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LIST DEFINITIONS AND TERMS

Economic Impacts Assessment (EIA) refers to ¹an assessment of the current or possible impact—positive or negative—that affects the natural environment; ²an environmental impact assessment as "the process of identifying, predicting, evaluating and mitigating the biophysical, social, and other relevant effects of development proposals prior to major decisions being taken and commitments made."

Environmental Auditing (EA) refers to a management tool which determines the actual and potential environmental impacts of both public and private sector activities. This technique may be used to assess the magnitude, level and importance of environmental impacts caused by tourism development.

Industrialization refers to the process of social and economic change, part of a wider modernization process, whereby a human group is transformed from a pre-industrial to an industrial society, where social change and economic development are closely related with technological innovation.

Social Impact Assessment (SIA) refers to a methodology to review the social effects of infrastructure projects and other development interventions.

Urbanization refers to the process by which large numbers of people become permanently concentrated in relatively small areas, forming cities; a country is considered to urbanise when over 50 per cent of its population live in the urban areas.¹

DMS Destination Management Organisation
 NGO Non-Government Organisation
 R&D Research and Development

¹ Long (1999)

SECTION 1.0 OVERVIEW

Following a brief information exchange among regional Partners at the inception of the ERNEST Project, a survey was developed (Deliverable 2.1 “Survey 1 – Mapping & Coordination of Regional Policies, Strategies, Programmes & Technological Capabilities”) to solicit information from each ERNEST Partner in order to identify joint call opportunities. Survey topics areas included general information about regional industry, the tourism sector, research policy, priorities concerning sustainable tourism practices and measurement, and existing sustainable tourism programmes.

The results of Survey 1 (as represented in Deliverable 2.1) were collected by the twelve (12) ERNEST Partners:

1. CATALUNYA/SPAIN
2. CCTD/France
3. BALEARS/SPAIN
4. EMILIA ROMAGNA/ITALY
5. ILIA/GREECE
6. AQUITAINE/France
7. NORDA/HUNGARY
8. SWT/UNITED KINGDOM
9. DFNA/DENMARK
10. SERDA/ROMANIA
11. TOSCANA/ITALY
12. BASQUETOUR/SPAIN

This report, Deliverable 2.2 “Survey 2 – Interregional Comparison” provides a concise textual summary comprising highlights of the results of Deliverable 2.1, and concludes with some suggestions and observations based on the results presented.²

Deliverable 2.2 is organized in three (3) main sections:

- 1.0 Overview
- 2.0 Survey Results
 - 2.1 Survey Section I: General Information
 - 2.2 Survey Section II: Tourism Sector (Regional)
 - 2.3 Survey Section III: Sustainable Tourism Programmes (Regional)
- 3.0 Conclusions

² Data collected as a result of Survey 1 has been transferred to the proceeding work package, and it is anticipated that the results will be used to allow cross-referencing and or other search-related features.

SECTION 2.0 SURVEY RESULTS

2.1 Survey Section I: General Information

Survey Section I requested general information about each regions' economy, industry, socio-economic structure, and level of industrialization. Specifically, when asked, 11 of 12 Partners identified Tourism as a main economic sector in their region, at the same time 9 of 12 Partners also identified Manufacturing, Industry and Trade, 8 of 12 Partners identified Agriculture, Fishing and Forestry, and Construction. Business Services, Electronics, Distribution, Mechanics, and Services were among the main economic sectors least identified by ERNEST Partners. Additionally, over 80% of Partners perceived their region as having either an *Average* or *High* level of industrialization.

Partners were also asked to identify any major shifts in industry or market in their regional within the last 10 years. Of the 7 Partners who replied *Yes* to their region having experienced a shift, 4 of 7 have changed from either an Industrial or Agricultural focus to Tourism. Furthermore, 3 of 7 regions also experienced a shift from Manufacturing, Industrial, or Agriculture to a Services – based industry.

In an effort to attain a more holistic view of each region's research and development (R&D) activities, Partners were also asked to list all official areas of R&D currently pursued and endorsed/funded by national or regional government. A greater number of Partners, 13% respectively, selected either or both Agricultural Sciences/Natural Resources and/or Engineering. Among the top four R&D areas identified, 12% of Partners currently pursue R&D activities in Biological Sciences/Biomedical Science, Computer and Information Sciences, Biotechnology/Nanotechnology, and Tourism.

Data was also collected on regional population ranging from 1.07 million (Iliia/Greece) to 7.21 million (Catalunya/Spain) habitants. Following regional population, Partners also provided the median income level for their region by selecting from a minimum of *Below 15.000€* to *Above 75.000€*, where of 12 of 12 Partners selected a median household income range of *15.000-45.000€*.

2.2 Survey Section II: Tourism Sector (Regional)

Survey Section II covered topics regarding the regional tourism. Specifically, Partners provided information concerning the 2009 Tourism Budget, human resources, new infrastructures/initiatives as an outcome of regional policy, regional tourism management, travel and tourism measurement, and measurement of economic, social, and environmental impacts as related to regional tourism.

Tourism Budget and Human Resources

Partners were asked to provide an approximation of their regional Tourism Budget for 2009. Ten of 12 regions confirmed a 2009 budget over 1 million Euros, with three regions reporting a budget between 1 and 5 million Euros, four regions between 15 and 50 million Euros, and the remaining three regions report a budget of upwards of 50 million Euros.³

³ Note: Regional tourism budgets were based on information provided by the Partner, who in some cases is utilizing secondary data, that may not include funds allotted for other regional activities or research related to tourism, and that Partners were not required to include the components of budgets submitted.

Information regarding human resources in regional tourism was collected by an account of the number of employees in the Tourism sector. Overall, results across all 12 regions revealed an average range of between 75,000-82,000 employees employed in the Tourism industry. Catalunya (Spain) and South West Tourism (U.K.) employ the largest number of employees in tourism at 450,000 and 237,000 respectively. Not surprisingly, of the regions employing fewer employees, 14,000-130,000, all five answered *No* to having experienced any significant industry/market shifts in the last 10 years. No consistent direct relationship was found between regional Tourism Budget and human resources in the tourism sector.

This may be of additional importance when taking into consideration that 83% or 10 of 12 Partners said *Yes* to the recent formation of new tourism infrastructures/initiatives based on research and as an outcome of new regional policy in between 2004-2008, and its influence on the labour market.

Travel and Tourism Measurement

Other essential information collected included information on travel and tourism measurement, as well as the measurement and evaluation of certain impacts directly or indirectly related to tourism. Thus, several questions focused on travel and tourism measurement under two categories, Tourism Flows and Tourism Accommodation Facilities where a separate line of questioning was developed for measurement of economic, social, and environmental impacts of tourism.

With regard to measuring travel and tourism, Tourism Flows was divided into the *Number of Annual tourist arrivals* and *Number of Annual overnight stays*. Results show, with the exception of two regions whose data was unavailable, and one region experiencing the opposite situation, 9 of 12 regions experience anywhere between two to eight times the number of overnights stays than annual tourist arrivals per annum.

With regard to measuring Accommodations Facilities, Partners were asked to provide data for the number of *Beds available* both *in hotels and non-hotels* in their region. Surprisingly, 6 of 11 Partners indicated a significantly larger number of beds available in *non-hotel* facilities, with the 5 remaining regions exhibited opposite behaviour.

Taking into consideration the goals and objectives of the ERNEST Project, it is necessary to understand if and how each region measures their economic, social and environmental impacts related to tourism. Partners completed three separate series of questioning focused the measurement of each of these impacts. Taking into consideration that measuring these types of impacts are subjective to the use of different methodologies, indicators, and systems, therefore, each line of questioning was based on the use/non-use of an Economic Impacts Assessment (EIA) or Social Impacts Assessment (SIA). Of those Partners utilizing either of these assessments an opportunity to select the approach used within the EIA or SIA (e.g. multipliers, conducting interviews) was also provided. In the case of measuring environmental impacts, questions were based on the use/non-use of Environmental Auditing (EA) and selection of specific areas of data collection within the EA.

Results reveal a majority of regions currently measure both their economic and social impacts using an EIA and SIA approach. While the use of specific indicators within the EIA or SIA varied among regions, the results show that *Tourism activity (# of visits)* and *Spending* where the most commonly used indicators in EIA measurement with 8 and 7 regions respectively. For those regions using a SIA approach to measure social impacts, 5 of 7 Partners identified *Conducting and analyzing resident surveys* as the most common indicator used.

Recognizing those regions not currently employing any specific methodology in measuring the economic or social impacts related to tourism, but expressed doing so in the future as a priority

interest of the region. These regions include, for both economic and social impacts: Ilia (Greece), Aquitaine (France), NORDA (Hungary), and SERDA (Romania).

Regarding measurement of environmental impacts, the results indicate an even split (2-2-2) among the six regions currently measuring environmental impacts utilizing an EA approach, either alone, included in a larger EIA, or as part of a national assessment. The remaining six regions do not currently employing any specific methodology in measuring environmental impacts related to tourism, but expressed doing so in the future as a priority interest of the region. These regions include: Catalunya (Spain), Balears (Spain), Ilia (Greece), Aquitaine (France), DFNA (Denmark), and SERDA (Romania).

Tourism Management

Looking toward the creation of joint call opportunities, it will be fundamental that ERNEST Partners acquire a better understanding of the tourism management of each Partners region. In order to facilitate this understanding Partners were asked to provide a top-down view of the tourism management structure within their region.

This information led to the creation of a flowchart of each regions tourism management structure (see WP2 - Deliverable 2.1). Overall, the degrees (i.e. levels of authority or managing bodies) of tourism management ranged from anywhere between 2 to 6 levels of management including, entities such as local tourist agencies, city councils, destination service providers, and research centers. Of the 11 flowcharts constructed, one-third of Partners recognized a national entity at or near the top of their management structure (ILIA/Greece, SWT/U.K., DFNA/Denmark, SERDA/Romania), while the remaining eight partners identified either a regional government or regional council as their highest managing body.

While not all Partners identified a national entity within their tourism management structure, it is not unrealistic to assume that a national entity is consulted or has influence at some point during the regional tourism decision-making process, especially when considering programme funding.

Among other tourism management entities identified, more than half of Partners listed a local tourist agency/office, DMO, NGO, and for a few, an academic institution, research centre and an observatory were also listed.

2.3 Survey Section III: Sustainable Tourism Programmes (Regional)

Survey Section III was created to solicit information regarding each Partners regional sustainable tourism development, specifically, regional programmes and initiatives. Partners were administered as series of questions which allowed them to list and describe any *current* regional sustainable tourism programmes including an extensive line of questioning covering different programme characteristics under each of the following categories:

- Programme Information
- Programme Focus
- Programme Participants
- Programme Funding
- Programme Competency and Projects
- Programme Calls, Proposals.

All programmes listed were compiled and placed into a spreadsheet to facilitate cross-comparison among programmes. The following includes some highlighted results found in Survey Section III. Thirty-two sustainable tourism programmes were listed by 11 Partners.

Each region has distinctly different goals and needs in terms of sustainable development; however, some emerging patterns should be noted.

Choosing from a listing of nine areas under sustainable tourism, Partners were asked to identify those areas applicable to each of their region's programme. The majority of Partners identified (among others) that the programme(s) focused on *Conservation of environmental heritage*. At the top of the list, other commonly selected areas included *Reduction and optimization of natural resources*, *Reduction and optimization of energy consumption*, and *Waste Management*. Partners were also required to indicate if a programme specifically addressed 'competitiveness' and/or 'innovation' or neither. Half, 18 of 32 programmes were said to focus on *Both innovation and competitiveness*, followed by 3 programmes addressing either *Competitiveness* or *Innovation* and finally 8 programmes who do not focus on either with *Neither innovation or competitiveness*.

Furthermore, when asked about programme funding, the results indicate that while a number of programmes do not have access to additional funding for transnational or international activities, some programmes do have the capability to participate in cooperative research initiatives with other regions and/or countries.

Following each line of questioning, Partners were given the opportunity to list any best practice scenarios, obstacles & solutions or lessons learned pertaining that particular programme as well as any additional information useful to the goals and objectives of ERNEST but not listed with a specific programme. In general, a cursory review of individual programmes characteristics indicates some significant differences among programmes, however, with regard to Partners' responses for best practice scenarios, obstacles & solutions or lessons learned, emerging themes were identified. These themes are best described by the use and grouping of the keywords below:

- Innovate, Create and Restore
- Evaluate, Audit and Incentive
- Observe, Discuss, Educate, Evolve
- Protect & Quality of Life

SECTION 3.0 CONCLUSIONS

Travel and tourism researchers have put a tremendous amount of time and effort into identifying and understanding their counterparts in other regions and countries in order to more efficiently address the needs of both the region and the travel and tourism consumer. One aspect clearly understood is the need for more sustainable tourism research. The information collected from the twelve ERNEST Partners sheds some light on the current activities and needs of each of the participating regions, as well as provides some insight to where joint call opportunities and activities may lie.

The results of this Survey identified useful background information, and provided general direction and understanding about the interests, goals and accomplishments of each region. Most importantly, the results reveal that while some immense complexity exists between each region's economy, research policy, and actions in sustainable tourism development or lack thereof, common criteria and goals do exist.

Furthermore, while several important patterns emerged in the results of Survey 1, future research and inquiries should seek to explore several dynamics in greater depth, raising additional questions such as,

- What other barriers or obstacles have existed in the past that may have slowed or prevented sustainable development in tourism (e.g. other financial constraints, certifications, governmental 'red-tape'?)
- What other informational sources can be utilized in collecting information (e.g. stakeholders, academic discussion/student think tanks)
- What other current roadblocks exist and suggestions on how can they be mitigated?

Based on the findings thus far, still humble in representation, the following actions, some already being pursued include,

- Joint education and vocational training (including e-learning)
- Personnel exchange and study visits
- Equipment/facility sharing
- Interregional evaluation procedures (common evaluation criteria and methods of implementation)
- Specific cooperation agreements
- Commonly defined action plans
- Clustering of research projects, to develop complementarities or mutual reinforcement among programmes
- Development of common project evaluation procedures

This research has proven beneficial in several ways. First, it has proven useful in expanding our knowledge of each ERNEST Partner and the region they represent, specifically within the scope of research areas pursued, travel, tourism and sustainable tourism development, in which very little empirical data exists in the context of comparing European regions/countries. Second, it provides a distinct opportunity to examine future collaboration efforts among ERNEST Partners. Both researchers and industry professionals would be wise to recognize the need for expanding sustainable tourism development and its ability to critically influence regional economies and the travel decision-making behavior of current and future consumers.