**ERNEST Indicator Survey – Analysis of the Results**

**Question 1: How does your region/area decide what tourism indicators to use?**

There were four broad areas of response:

* **Enforced or implied,** for example through international or national frameworks, government, institutes, National Statistics and data collection systems, Tourism Satellite Accounting, through funding requirements or set in strategy/charters
* **Independently determined** so the region decides and develops its own
* **Independent choice from existing national indicator sets** or data collection systems
* **In collaboration/cooperation/consultation** with others e.g. academic institutes, through project or programme developments, development programmes, stakeholder focus groups, networks e.g. NECSTouR

There were some considerations:

* Availability and sources of data
* Purpose varies e.g. programmes, projects or strategic
* Different levels - national, regional, sub-regional and the less popular local level
* Sustainable development indicators can exist but may not be clearly related to tourism or appear optional
* Additional studies, research and/or measurements (“own” methodology)

Mainly appear to use existing indicators, data and systems which predominantly collect traditional indicators and in some instances sustainability indicators or others

**Do you use indicators to consider how 'sustainable' tourism is in your region?**

The majority (6) are starting to consider or partly using indicators to consider how sustainable tourism is in the region. There are 4 using them and only 1 who is not.

Yes partly or starting to consider this (6)

Yes (4)

No (1)

**If you don't use indicators to measure and improve the sustainability of the tourist sector please describe why not?**

* Lack of specialist personnel in tourism
* Data not available at regional level
* Tourism industry is mainly focused on attracting tourists
* No comprehensive and acceptable system has been introduced yet
* It has not yet been a priority
* Sustainability is currently seen as a form of incentive for SMEs

**Question 2: Have you developed consistent techniques for data collection, for example indicator definitions and collection methodologies?**

The majority of respondents answered yes to this question:

Yes 72.7% (8)

No 27.3% (3)

**Comments from those who answered ‘no’:**

* It is unified at national level
* Apart for regional and local projects on cultural routes in the region

**Comments from those who answered ‘yes’:**

* Within the framework of the regional tourist development scheme measures were taken by the Region to set up a regional Network of expertise and engineering. A more detailed work should be led within the framework of the 3rd regional tourist development scheme.
* The CRT PACA also works with the Regional Observatory centre of the Energy on a study concerning the environmental impact of the tourist activities in the PACA region from which we should obtain new measures (energy consumption) detailed by both the type of activity and the territory, to include greenhouse gas emissions
* The region has produced a document which gives the guidelines to the indicators work. It defines the domains and contains the list of core indicators
* There is one indicator in the present budget programme, which has been recently implemented.

**Question 3: How did you decide how to measure and what definitions to use?**

**Please describe:**

There was almost an even split between National and Regional influence and approach:

National Decision (6)

* Although regions may be able to comment in the planning period
* Based on the existing statistics provided by National Institutes
* TSA-based definitions/methods used internationally
* Tourism research and measurement is controlled and co-ordinated by Government
* Official definitions (can include European and International influence)

Regional Decision (5)

* Decided using the concept and definition of sustainability
* One of the axes of the regional tourist development scheme
* Referred to previous works at an international, European, national and local level
* The accessibility and validity of data, motivation and partly on enforcement
* Based on statistical surveys introduced and followed traditionally
* Agreed a core set of indicators working with the universities and provinces, but each destination decides which indicators to use (from the core set) and if there is a need can add more indicators that are adequate to local needs

**What methodological uncertainties still exist?**

* Regional and local level uncertainties
* Data issues from other organisations
* Operational uncertainties
* Carbon footprint
* Continuity (data collection and standardisation of data collection procedures)
* Verification and benchmarking (i.e. verification of uniformity of the collection methods and data fluxes)
* Time consuming procedure involving too many levels

**Question 4: Do your tourism indicators help your region to:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **No** | **Yes** | **Partially** | **Don't Know** | **ResponseCount** |
| **1. Promote tourism** | 0.0% (0) | **100.0% (12)** | 0.0% (0) | 0.0% (0) | 12 |
| **2. Enhance quality** | 8.3% (1) | **83.3% (10)** | 8.3% (1) | 0.0% (0) | 12 |
| **3. Increase tourist numbers** | 0.0% (0) | **75.0% (9)** | 16.7% (2) | 8.3% (1) | 12 |
| **4. Inform policies for sustainable tourism development** | 16.7% (2) | **66.7% (8)** | 16.7% (2) | 0.0% (0) | 12 |
| **5. Improve economic competitiveness and sustainability** | 8.3% (1) | **58.3% (7)** | 25.0% (3) | 8.3% (1) | 12 |
| **6. Improve social and cultural identity** | 18.2% (2) | **54.5% (6)** | 18.2% (2) | 9.1% (1) | 11 |
| **7. Encourage benchmarking** | 0.0% (0) | **50.0% (6)** | **50.0% (6)** | 0.0% (0) | 12 |
| **8. Protect the environment** | 16.7% (2) | **41.7% (5)** | 33.3% (4) | 8.3% (1) | 12 |
| **9. Collect data on working conditions** | **33.3% (4)** | **33.3% (4)** | **33.3% (4)** | 0.0% (0) | 12 |
|  |  |  |  |  |  |

**Other responses to this question are that tourism indicators can also help a region to:**

* Improve the strategic and action planning process, encouraging a "reality" check and consideration of the bigger picture.
* Develop a more sustainable management style, and in addition increase the capacity of public and private stakeholders in the destinations

**Question 5: What is your approach to monitoring and managing your indicators?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Yes** | **No** | **Don’t Know** | **Count** |
| **1. Do you have long-term and consistent monitoring mechanisms in place?** | **83.3% (10)** | 16.7% (2) | 0.0% (0) | 12 |
| **2. Do you review your indicators periodically?** | **75.0% (9)** | 25.0% (3) | 0.0% (0) | 12 |
| **3. Do you publish or report your indicators?** | **66.7% (8)** | 25.0% (3) | 8.3% (1) | 12 |
| **4. Have you identified time-bound targets and thresholds?** | **36.4% (4)** | 45.5% (5) | 18.2% (2) | 11 |

**Additional comments and detail:**

* Once the indicators have been selected a second stage begins finding the optimum ways to monitor and manage those indicators that allows us to remain as a destination based focussed on sustainability
* The region and the agency follow and use the tourism indicators on a programme or project base and no comprehensive system of collection and monitoring exists yet
* We have a sustainable tourism framework, an associated action plan and agreed indicators for measurement
* Indicators are published in regional reviews and periodically updated

**Question 6: How do you use and apply your sustainable tourism indicators?**

**Briefly describe how your indicators are used to inform mainstream policy or strategy?**

The most popular type of response in order is:

* To inform and review policies, strategies and interventions (3)
* Monitor, analyse and report on data, trends and progress on an annual basis (3)
* A management tool (2)
* Strategic decision making (2)
* Background information (1)
* Through interpretation to composite indicators such as GDP (1)

**If they are not used to inform policy or strategy, please explain why not and what they are used for?**

* The indicators are part of the application leading to certification for the European Charter of Sustainable Tourism
* Following the program STEPPA but it is still in the experimental state
* Lack of resources
* Tourism organisations are not focused on sustainability

**Does sustainable tourism measures and management add to the destinations unique selling proposition and potential? (10)**

The majority of responses responded positively and that yes or in part they do:

* **No** (1)
* **Not yet** (1)
* **Yes, partly** (4)
* **Yes** (4)

Considerations include:

* Hopefully in the long term
* Some specific indicators are related to local identity, with the aim to map, define and strengthen it
* A way of enhancing the attractiveness of the destination itself
* Creates communication opportunities and ideas for development of new products
* Currently estimating the effects of an overall policy of sustainable development on the regional scale

**If yes to the question above, what evidence do you have of this?**

* Increased interest of labelling and use of label by stakeholders
* The indicators can help to implement policies and consider current and potential supply
* Some tourism destinations enjoy high numbers of visitors due to the limited access for cars, or because of the wilderness and rural untouched heritage
* Mapping the perceptions of the region as a sustainable tourism destination
* People and tourists recommend visits to the area for its unique value
* There are different Product-Plans

**What should be measured with tourism indicators in order to successfully evaluate tourism development in terms of sustainability?**

The most common response was to encourage a broader range of tourism indicators to measure the three key dimensions of sustainability: social equity, economic efficiency and environmental protection in order to successfully evaluate tourism development in terms of sustainability.

Other suggestions include:

* Need to measure beyond supported projects as this is not enough to illustrate the whole situation and extend to all tourism actors
* Should measure long term
* Measures for environmental impact, for example quality of physical environment and resource consumption

**Question 7: What lessons have your learnt using indicators?**

**Please describe the key lessons from your work with indicators?**

* No appointed organisation to measure the tourism sector comprehensively
* Optional sustainable commitments are not enough, they need to be enforced
* Public sector: under-utilisation of resources during low season and over-saturation of resources during peak season.
* Private sector: profits in a short space of time, very sensitive to the market conditions, appropriate balance by the end of season.
* Tourist product: dependence on a product (sun & beach), it’s important to specialize the tourist products in order to be competitive
* Currently experimenting with the Equalto Destination tool
* Tourism industry focuses on economic measures
* Using indicators to describe qualitative elements has been important in order to paint a comprehensive picture of our local tourism sector
* Thinking about management policies that consider all stakeholders and characteristics of the territory
* The collection of indicators in some cases is pretty tough and demanding work, the motivation to provide data for sustainable monitoring is often limited.
* The use of indicators must be evidence based and their use and need of collection well justified
* Difficult to collate indicators which cut across other sectors and therefore problematic to give an appropriate figure for tourism
* Necessity to concentrate not only on tourist promotion, but on integrated management. Important to be inclusive and involve stakeholders
* Provide a new perspective of tourism information and help define the meaning of sustainable development
* Tourist behaviours vary and indicators must be able to reflect these changes

**What do you see as the strengths of your sustainable tourism indicator work?**

* Unified methodology
* Innovative measurement and use of technologies
* Appropriate data and interpretation
* Improved competitiveness
* Increased interest in labelling
* Improved knowledge, understanding and decision making
* Informed policy and strategy development
* Benchmarking
* Improved attitude and relations

**What do you see as the weaknesses of your sustainable tourism indicator work?**

There were four themes emerging around quality, capacity, leadership and skills:

Quality

* Issues around timeliness
* Limited number of sustainable tourism indicators (only one non-economic indicator)
* Difficulty to describe qualitative elements
* Data collection issues (old patterns and adaptation is slow)
* Some indicators are still ambiguous

Capacity and scale

* Currently only applied to those who get funding
* We can’t cover all tourism actors.
* Hard to effectively manage the data and information

Leadership

* Scarce resources to motivate the indicator "owners"
* Lack of widely acceptable system for long term collection

Skills

* Tourist sector is weak, there is a lack of specialised training and a technological deficit
* Tourism indicator work is still in early stages

**Question 8: What operative models, conditions or support would be helpful for your work with indicators? Please describe your thoughts:**

Models

* It would be helpful to identify operative models in the most important tourist destinations all over the world
* Impact models
* The implementation of TSA could help

Conditions

* Specified statistical data should be available also at micro-level
* Indicators of sustainable development should be published not only at national level
* A set of internationally recognised indicators similar to TSA but measuring social and economic factors
* Should be mandatory and with shared methods and definitions
* A better integration of sectors and knowledge could be advisable (interaction with social, sanitary, environment sector).

Support

* More specific support around the ecological footprint and the RSE could be useful.
* Crossing of the information and the indicators with tools that evaluate impact.
* Nationally introduced and supported (partly enforced) system of data collection to the lowest level
* Help with transport surveys, carbon footprint and wellbeing (happiness) measurement
* A more effective coordination between the agents involved
* This sustainability group is helpful
* Benchmarking
* Necstour

**Question 9: Are you aware of any good practice or work on sustainability indicators that we should review, especially in domains still little investigated by tourism?**

Yes:

* Ecological footprint
* SENSOR-project has EU-wide measures on wastewater from tourism using BOD5. It is easy to use and calculate for tourists. Also indicators on waste, + two more are included at EU-wide scale.
* Cardiff Business School and Welsh Government, Visit Wales
* Work done in other sectors could serve as inspiration (environment sector and the European Agency for Environment)
* The visitors' number in museums and Venetian Villas
* In our opinion, it is not only important to measure and analyse the quantity of visitors or the occupancy rate of accommodations among others, but also to measure the quality of the visits. It can help to review literature on the capacity of tourism load, as well as on the emotional impact and satisfaction degree of the activities

**Question 10: Do you have any other observations or comments you would like to make regarding the development, use and application of sustainable tourism indicators?**

* Willingness to make sustainable tourism indicators unified and encourage comparability
* Delegate the task of collection and measurement to a relevant body / organisation
* Development, use and application of sustainable tourism indicators are very necessary in order to become more competitive day by day
* It needs to be mandatory and with shared methodology in line with the TSA system
* It is absolutely necessary to improve indicators to better measure qualitative elements/aspects in development tourist processes
* Good practices in this area would be beneficial for many stakeholders
* Methodology needs to be developed and co-ordinated on a pan European and International level to ensure consistency
* Utilise public procurement to drive use, for example in public tenders and related to tourism infrastructure development