



ETIS
POOL OF EXPERTS

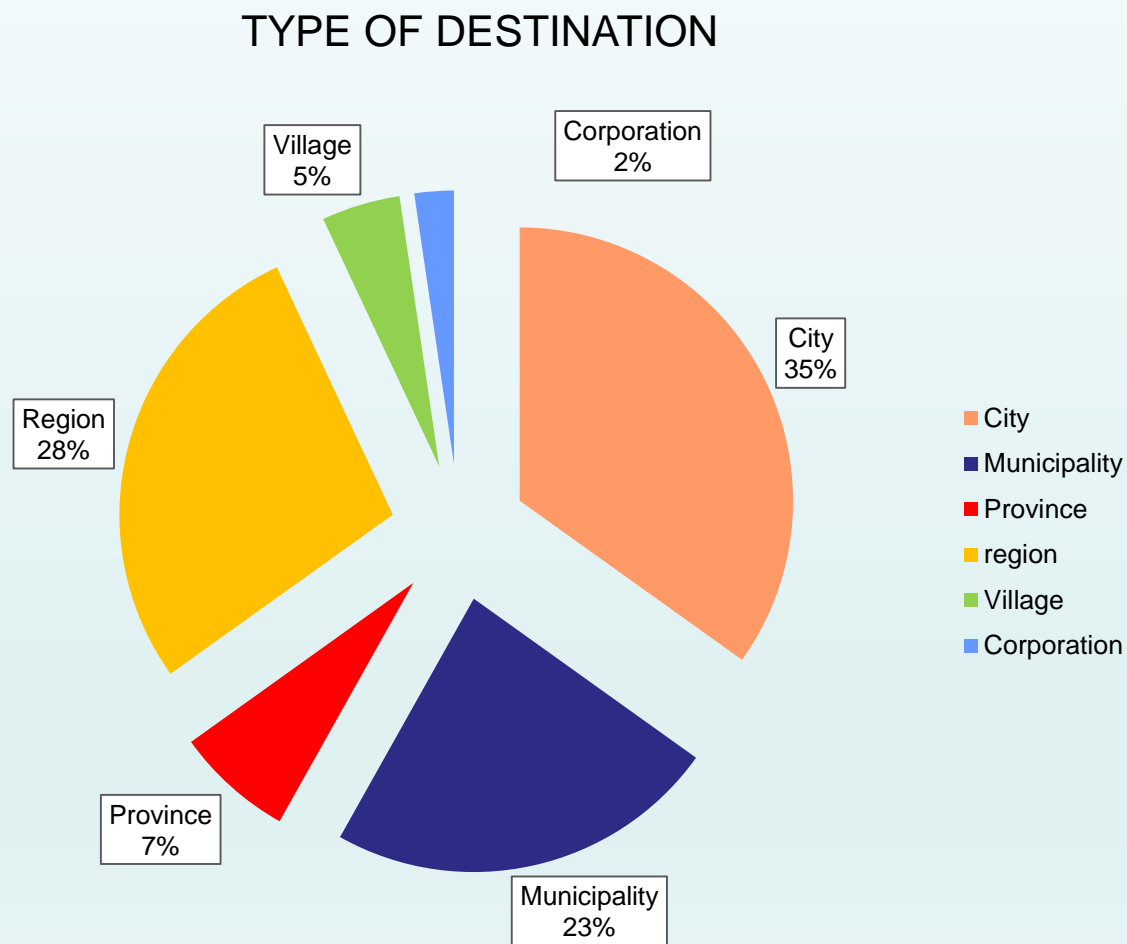
ETIS – The European Tourism Indicator System for Sustainable Destinations

**Analysis of
1st Pilot Implementation Phase
15. July 2013 – 15. April 2014**

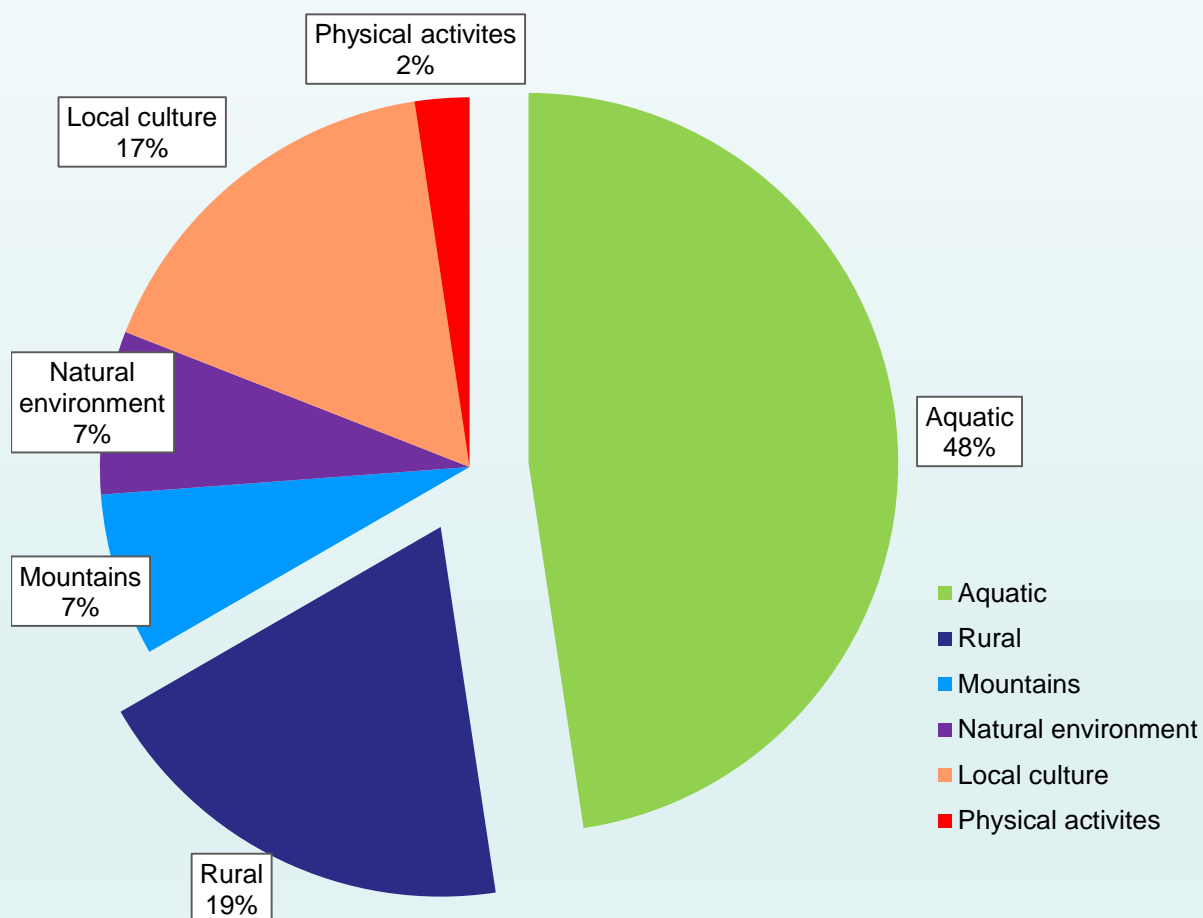
- Sustainability and competitiveness of European tourism is one of the priority aims of tourism policy of the European Commission
- ETIS – European Tourism Indicator System for sustainable destinations is implementation of EC tourism development strategy and policy, operationalization of instruments promoting and monitoring sustainability and guidelines for tourism destinations and destination organizations to transfer the system into everyday practice
- In February 2013 DG Enterprise and Industry – Tourism Policy Unit prepared for tourism sector ETIS TOOLKIT with dataset and invited tourism destinations to participate in pilot testing of ETIS; To this aim two testing phases were planned.
- The response to the first expression of interest to participate in ETIS testing was great: 104 tourism destinations from 18 countries accross Europe joined 1st testing phase; midterm evaluation was done on the basis of 50 tourism destinations while the overall evaluation at the end of testing phase – 15 April 2014 was done on the basis of 26 tourism destinations;

50 DESTINATIONS FROM 18 COUNTRIES IN 1st ETIS IMPLEMENTATION PHASE

Countries	No of Destinations
Belgium	1
Bulgaria	1
Croatia	4
England	1
Estonia	1
Finland	1
Greece	9
Ireland	1
Italy	10
Latvia	2
Lithuania	6
Portugal	3
Slovakia	1
Slovenia	3
Spain	3
Sweden	2
Turkey	1
Total	50



MAIN TOURIST OFFER OF 50 DESTINATIONS IN 1st ETIS IMPLEMENTATION PHASE



SEASONALITY IN 50 TOURISM DESTINATIONS

(0 = min = no season; 1 – low occupancy; 4 = max = overcrowded)

ALL DESTINATIONS



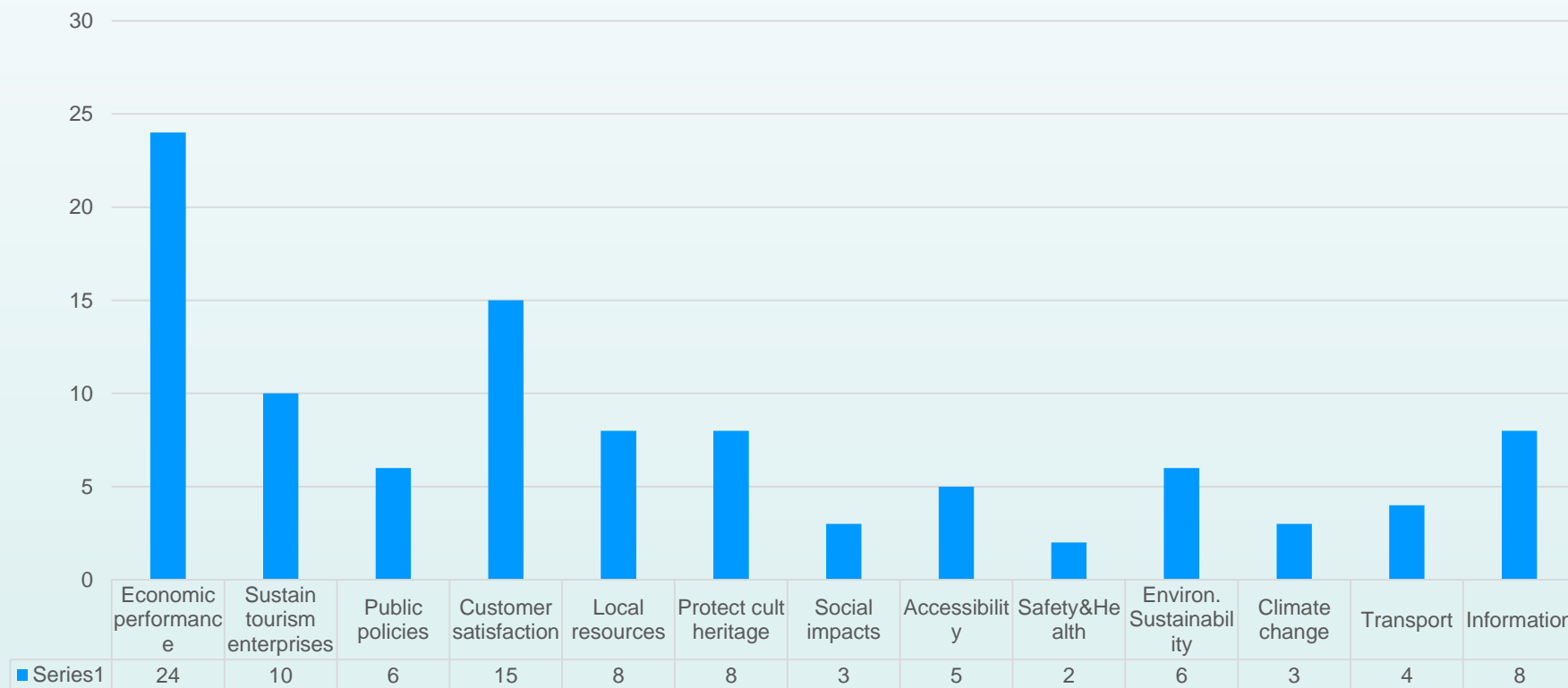
WITHOUT AQUATIC DESTINATIONS



**26 OUT OF 50 DESTINATIONS ARE REPORTING OVERCROWDED
SITUATION IN PEAK SEASON**

EXISTING MONITORING OF SUSTAINABILITY IN 50 DESTINATIONS

No of monitoring policies in destinations – total 102 policies



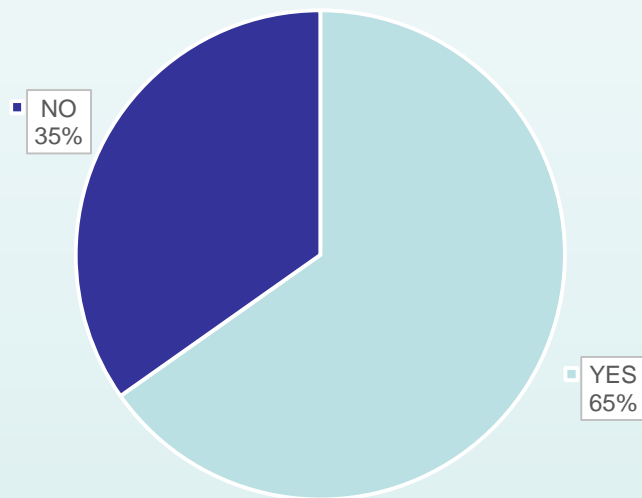
13 OUT OF 50 DESTINATIONS HAVE NO MONITORING OF SUSTAINABILITY YET

THERE ARE SOME BASIC CHARACTERISTICS OF DESTINATIONS PROFILE:

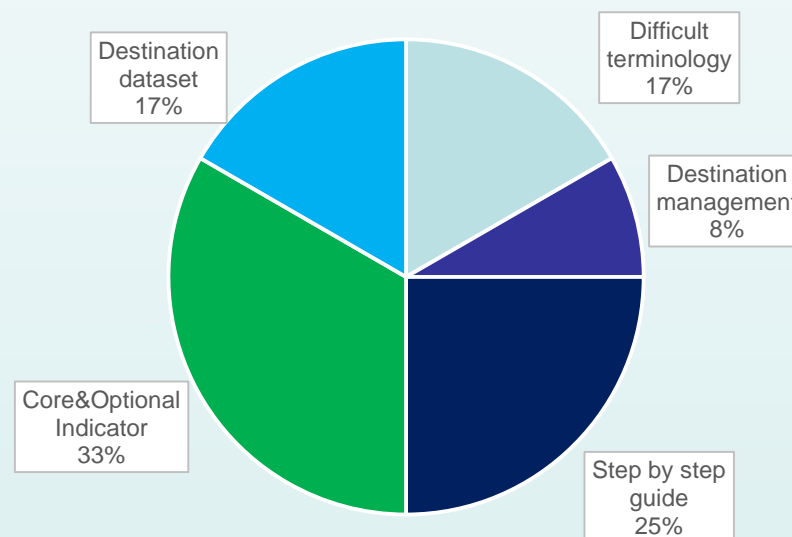
- There is big concentration of interested destinations from some countries (Italy, Greece, Lithuania) with city or municipality administrative structure (58% of all destinations);
- Aquatic tourism offer is prevailing (48%) followed by rural (19%) and local culture (17%) offer in tourism destinations;
- Seasonality of tourism is very high in summer time in all destinations and only slightly lower in other destinations than those with aquatic prevailing offer;
- It is remarkable that 26 destinations out of 50 report overcrowded situation which is not a surprise as nearly half of destinations have aquatic character and more than half are cities and municipalities;
- On average, each sustainable proactive destination has nearly 3 sustainable monitoring & policies in force! Still, there are 13 destinations without any sustainable tourism policy (6 regions, 6 cities and 1 corporation);
- Destinations' sustainability monitoring mainly focuses on economic issues of sustainability (37,3%), environment and culture (24,5%), customers (22,5%) and social issues (15,7%).

TOOLKIT PROVIDES SUFFICIENT GUIDANCE & PROPOSALS FOR IMPROVEMENT

Does Toolkit provides sufficient guidance for the implementation of the ETIS?



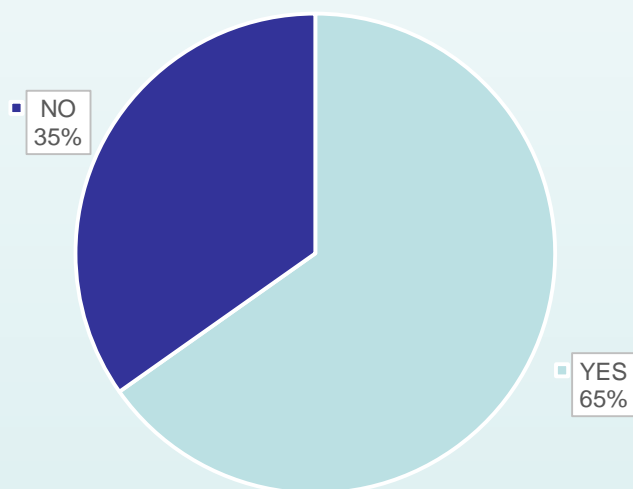
Which aspects of the Toolkit should be improved?



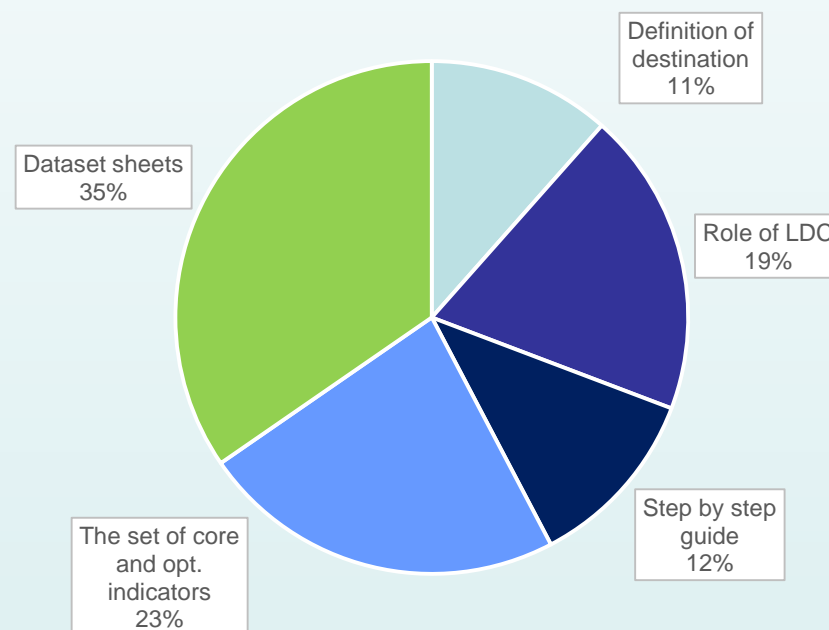
15 OUT OF 24 DESTINATIONS THAT COMPLETED QUESTIONNAIRE AGREE THAT TOOLKIT PROVIDES SUFFICIENT GUIDANCE FOR ETIS IMPLEMENTATION

ADDITIONAL SUPPORTING DOCUMENTS / GUIDELINES TO DESTINATIONS

Do you mean that additional supporting documents should be provided to destinations?



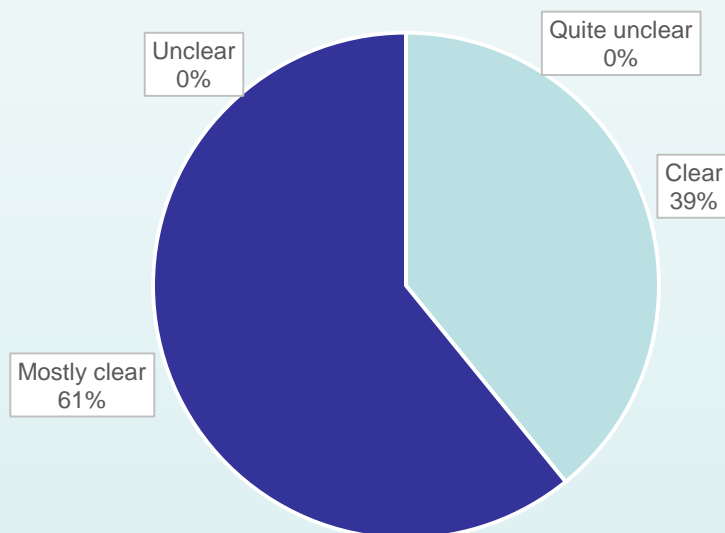
Supporting documents should be provided on:



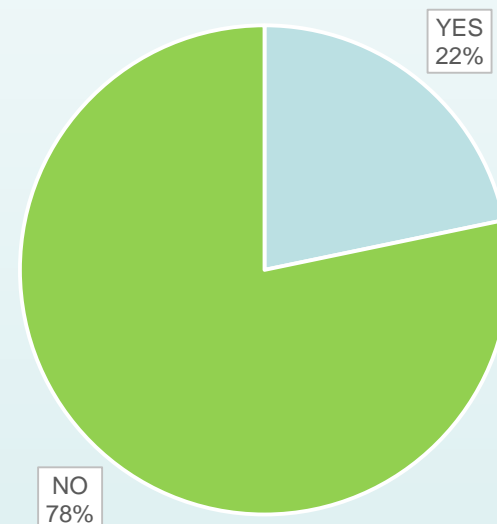
15 OUT OF 24 DESTINATIONS THAT COMPLETED QUESTIONNAIRE NEED ADDITIONAL SUPPORTING DOCUMENTS ON DATASET SHEETS AND ON THE SET OF CORE AND OPTIONAL INDICATORS

ROLE AND TASKS OF THE LOCAL DESTINATION COORDINATOR (LDC)

How did you find the role and the tasks of the LDC?



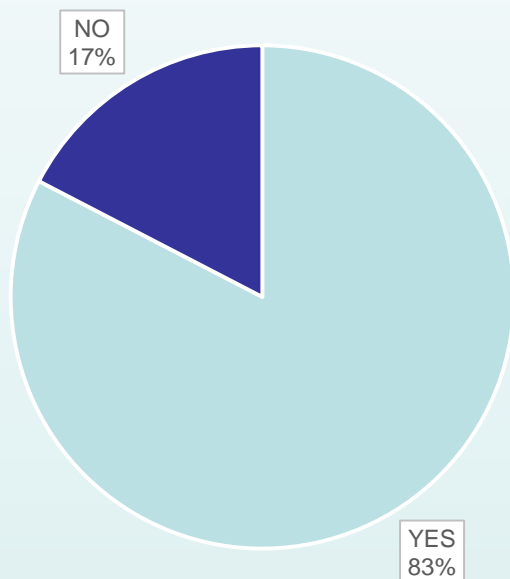
Did your destination find it difficult to appoint a LDC?



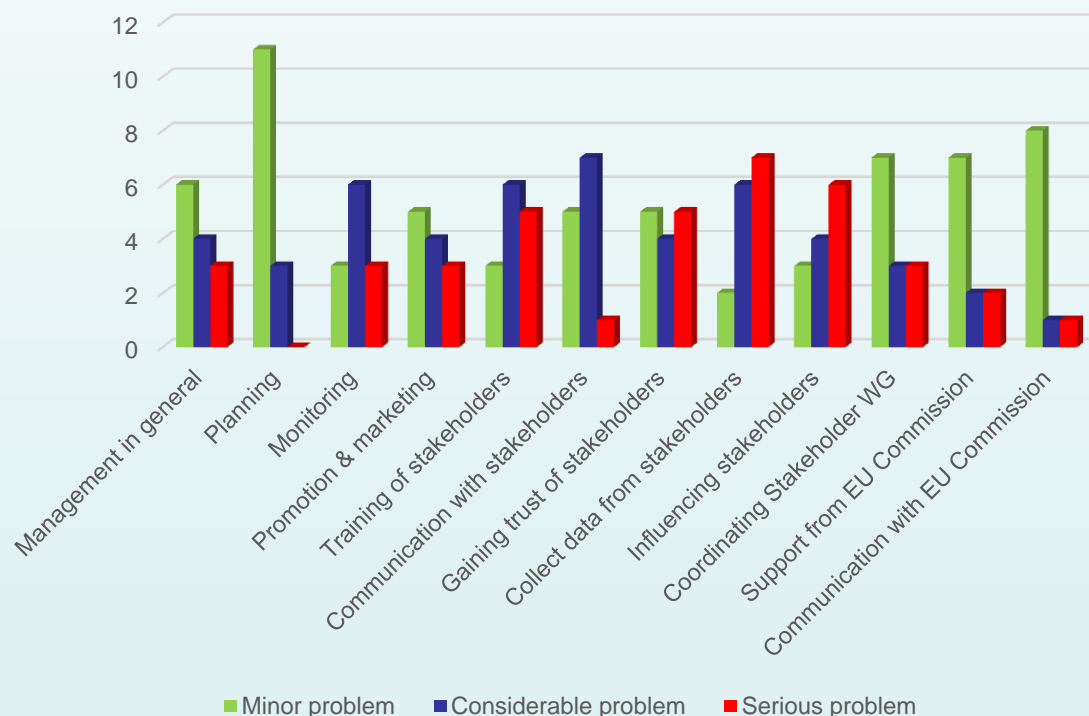
THE ROLE AND THE TASKS OF THE LDC IS MOSTLY CLEAR AND WITHOUT DIFFICULTIES TO APPOINT A LDC.

LDC DIFFICULTIES AND MAIN PROBLEMATIC AREAS

Did LDC experience any difficulties in carrying out tasks?



Main problematic areas



19 OUT OF 24 DESTINATIONS HAVE EXPERIENCED DIFFICULTIES IN CARRYING OUT TASKS, MAINLY WITH COLLECTING DATA FROM STAKEHOLDERS, GAINING TRUST OF STAKEHOLDERS AND INFLUENCING THEM. MINOR PROBLEMS WITH PLANNING.

Based on analysis of survey completed by 24 tourism destinations we can summarize:

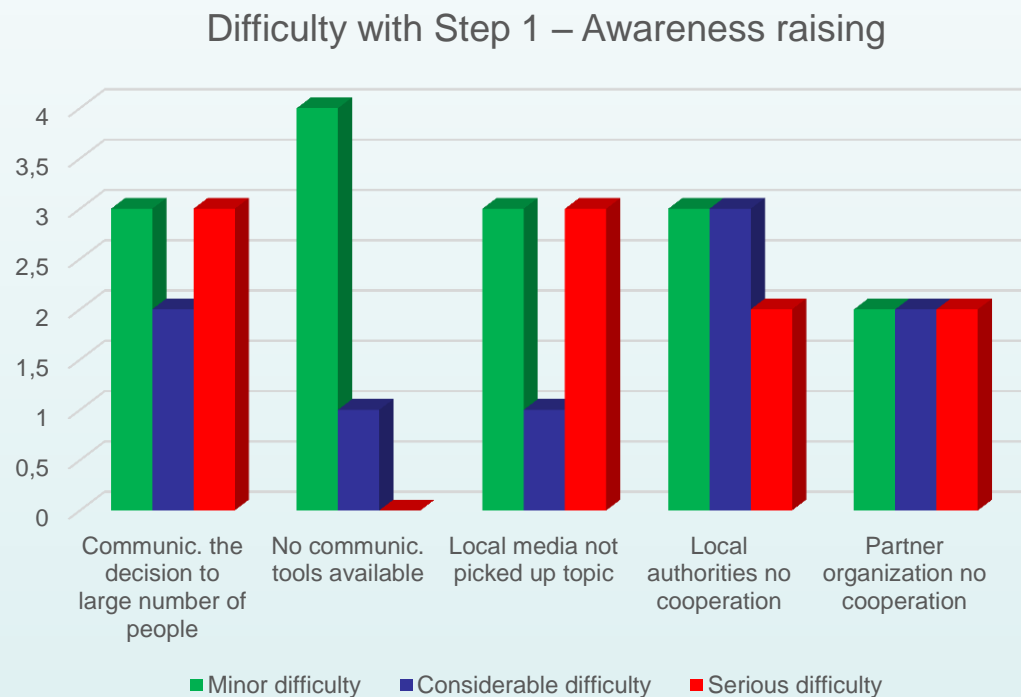
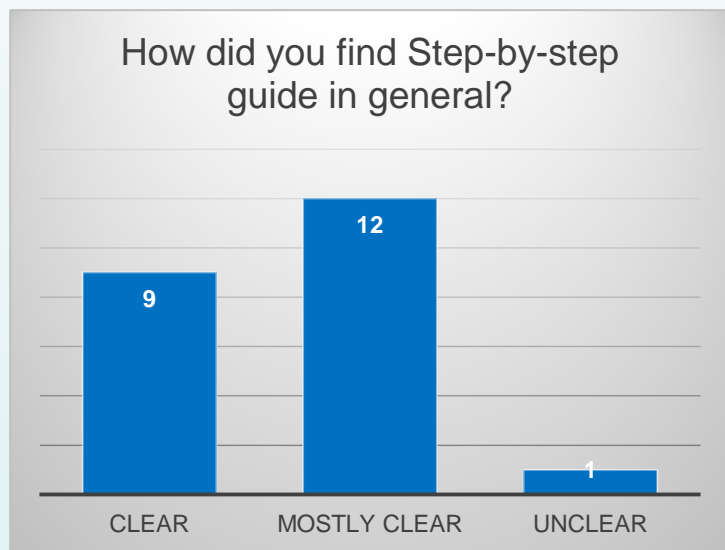
ETIS TOOLKIT gives sufficient support and guidelines to destinations for implementation of the system; there should be some improvements even with terminology and destination definition, but majority of additional work and documents should be focused on explanation, clarification and evaluation of core and optional indicators and data sheet;

LDC – Local Destination Coordinator, his role and tasks were the best evaluated. It was rather easy to appoint LDC in destination;

LDCs experienced several problems with their work connected mainly with getting trust and confidence of stakeholders, influencing them and collecting data from them, even coordinating meetings with them;

LDCs haven't experienced any problems in communication with EC – Tourism Policy Unit and their support.

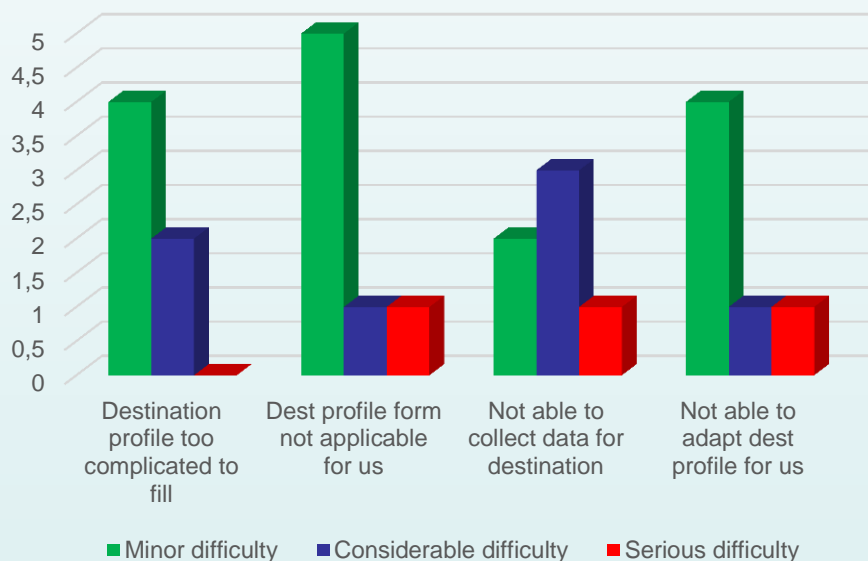
UNDERSTANDING OF STEP-BY-STEP GUIDE AND DIFFICULTY WITH AWARENESS RAISING



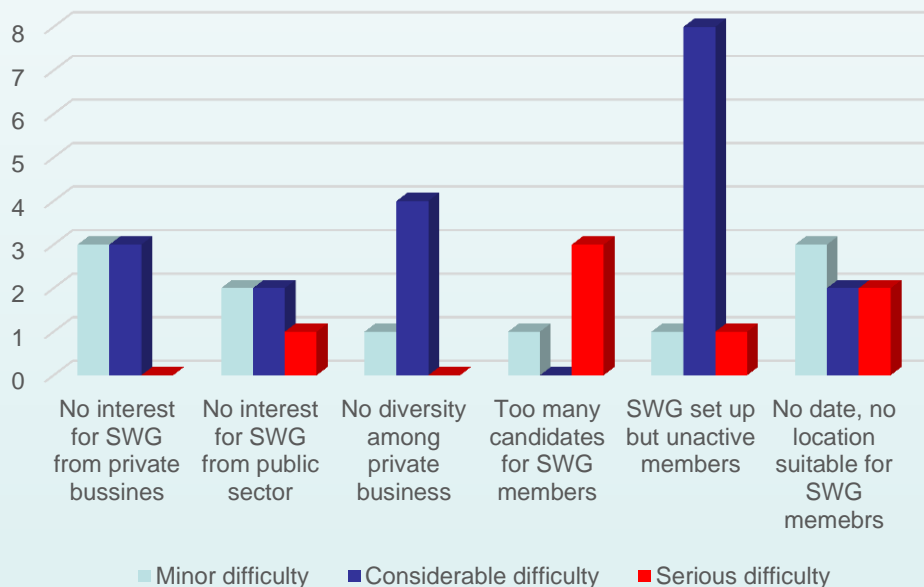
STEP-BY-STEP GUIDE IS MOSTLY CLEAR. DESTINATIONS HAVE FOUND DIFFICULTY WITH COMMUNICATION OF THE DECISION TO A LARGE NUMBER OF PEOPLE. MINOR DIFFICULTY WITH AVAILABILITY OF COMMUNICATION TOOLS.

DIFFICULTIES WITH DESTINATION PROFILES AND FORMULATION OF STAKEHOLDERS WORKING GROUPS (SWG)

Difficulty with Step 2 – Creation of Destination Profile



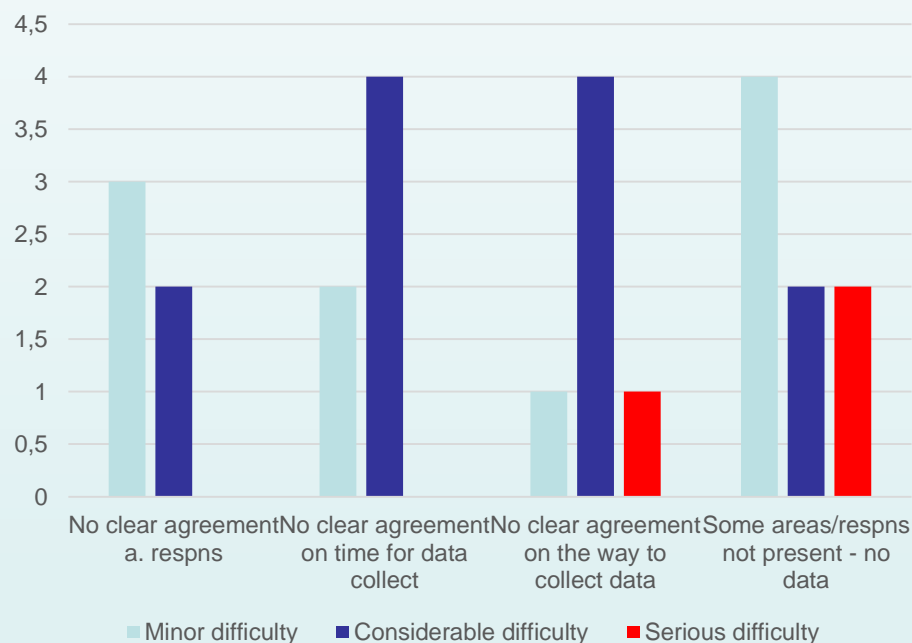
Difficulty with Step 3 – Forming a SWG



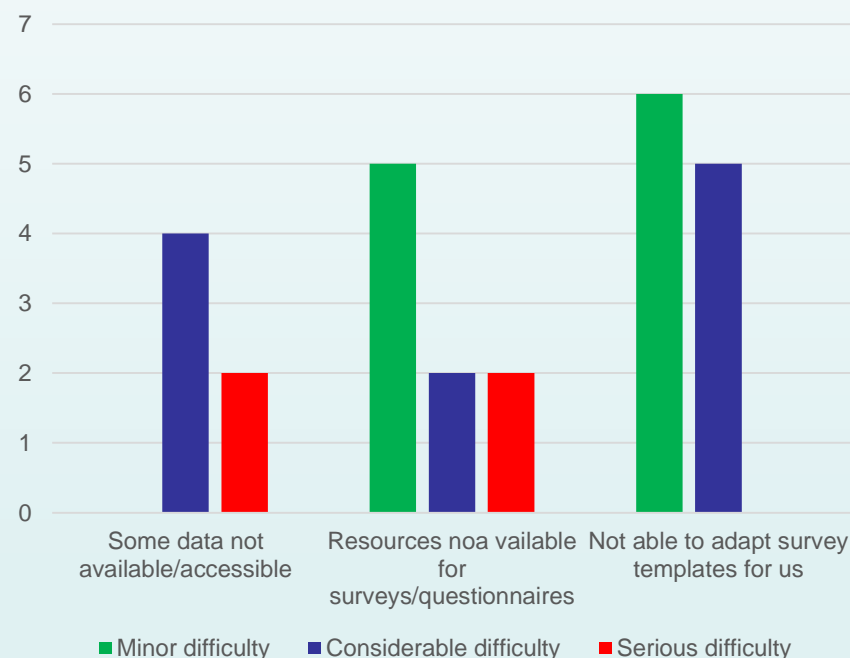
SERIOUS DIFFICULTIES WITH ADOPTION OF THE PROFILE TO THE DESTINATIONS AND CONSIDERABLE DIFFICULTY TO COLLECT DATA. DESTINATION HAVE ESTABLISHED THE SWG, BUT THE MEMBERS ARE UNACTIVE.

DIFFICULTIES WITH ESTABLISHMENT OF ROLES AND COLLECTION OF DATA

Difficulty with Step 4 – Establishment of roles & responsibilities



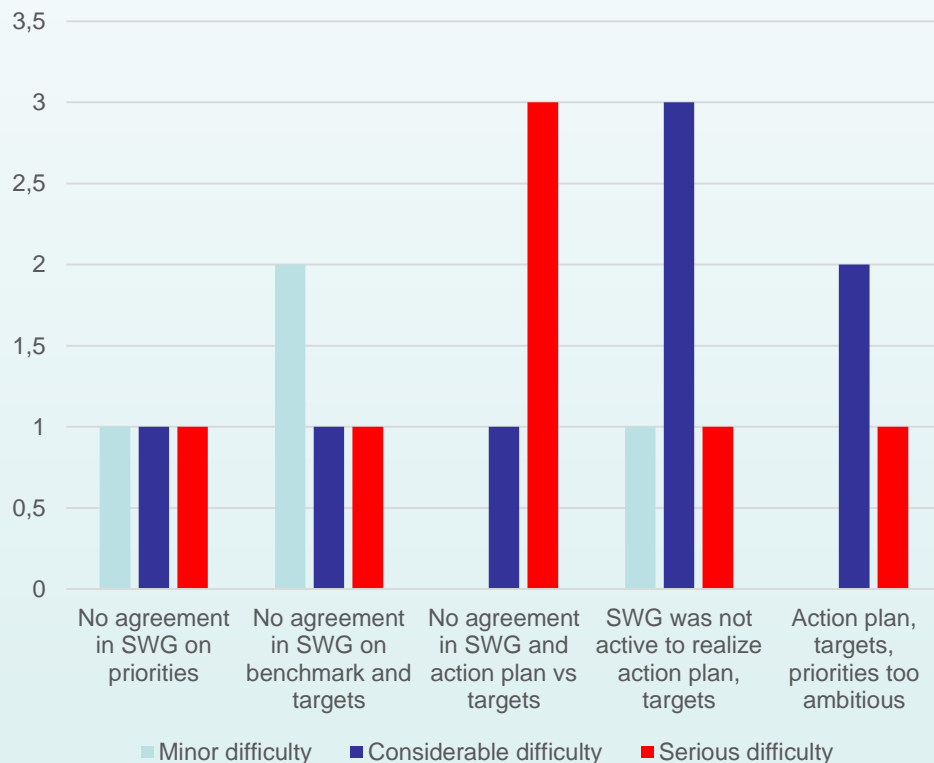
Difficulty with Step 5 – Collection & recording of data



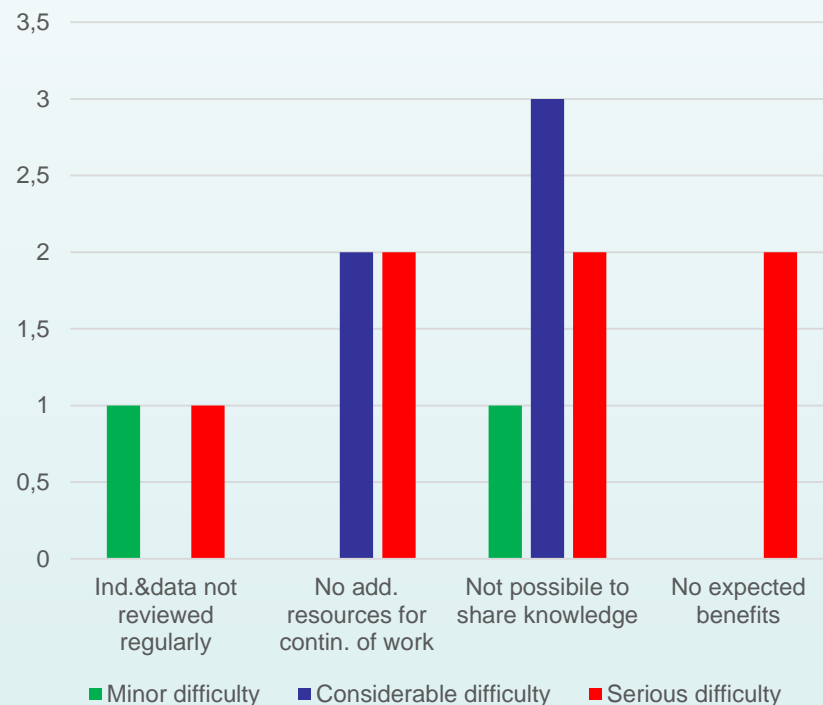
DESTINATIONS HAVE DIFFICULTIES WITH AGREEMENT ON TIME AND THE WAY TO COLLECT THE DATA. SERIOUS DIFFICULTY WITH RESOURCES AVAILABILITY FOR SURVEYS AND AVAILABILITY OF DATA.

ANALYSIS OF THE RESULTS AND CONTINUOUS DEVELOPMENT

Difficulty with Step 6 – Analysis of the results



Difficulty with Step 7 – Continuous development & improvement



SWG IN DESTINATIONS COULD NOT AGREE ON ACTION PLAN TO MEET THE TARGETS AND ARE NOT ACTIVE ENOUGH. THERE WAS NO POSSIBILITY TO SHARE KNOWLEDGE & EXPERIENCE WITH OTHER DESTINATIONS.

STEP by STEP guide is useful and mostly clear for all respondents /destinations, but....

- Awareness raising (step 1) met problems with communication to a large number of people, had problems with bad response of local media and bad cooperation of local authorities and partner organizations;
- Creation of destination profile (step 2): profile sheet is too complicated to fill and difficult to collect destination data;
- Forming SWG – Stakeholder Working Group (step 3): there were too many candidates for SWG, difficulties with coordination of its work and also unactive attitude of stakeholders in SWG;
- Establishment of roles and responsibilities (step 4): some areas of sustainability data were not covered by SWG, there was no clear agreement in SWG on a time and way to collect data;

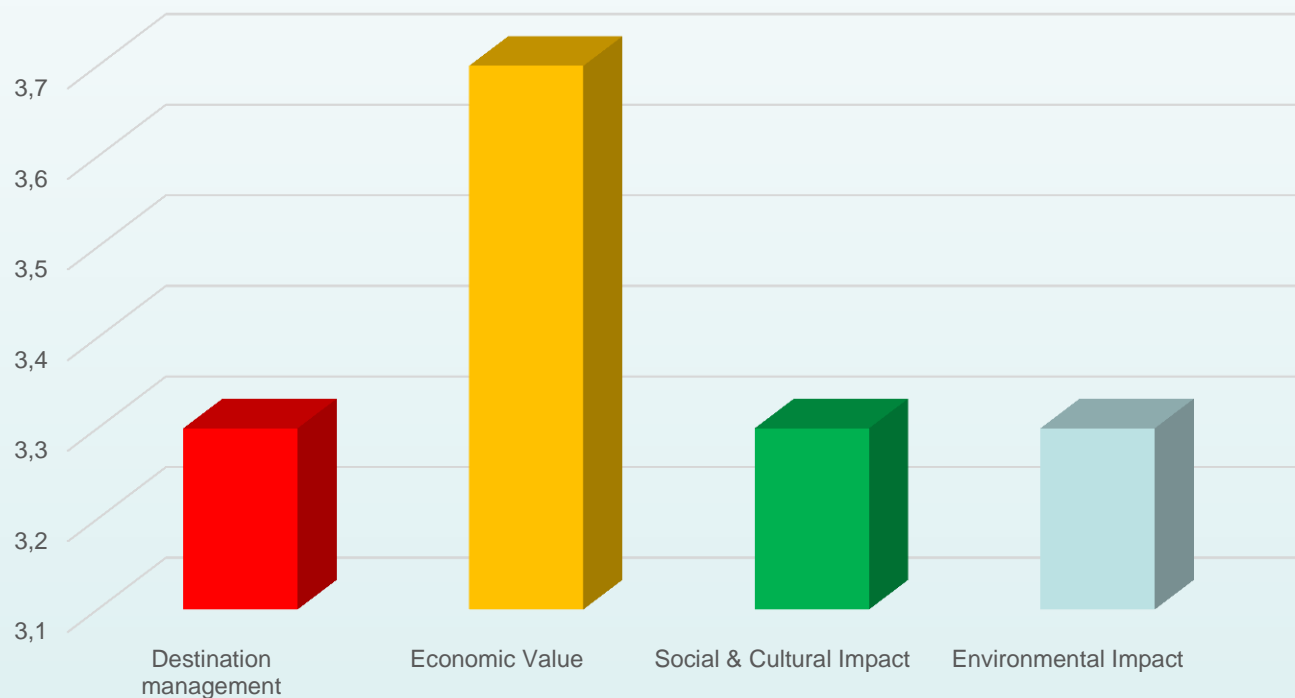
STEP by STEP guide is useful and mostly clear for all respondents /destinations, but....

- Collection and record of data (step 5): some data were not available, it was not able to adopt survey template to destination needs, there were no resources to conduct surveys for data collection;
- Analysis of the results (step 6): targets and activities were set too ambitiously, SWG were not active enough to realize action plans or to set action plan meeting the targets;
- Enabling ETIS continuity (step 7): no clear expected benefits of ETIS, no possibility to share knowledge and experinecs with other destinations and no additional resources for continuation.

24 out of 26 destinations evaluated 27 core and 40 optional indicators of ETIS based regarding Relevance, Costliness, Data availability, Accuracy, Clarity and Precision with scores from 1 to 5:

Scale	Relevance	Costliness	Data availability	Accuracy of measurement unit	Clarity/Comprehension	Precision of details of indicator
1	Irrelevant	No costs	Not available	Fully inaccurate	Unclear/Uncomprehensive	Imprecise
2	Low relevance	Low costs	Low availability	Low accuracy	Low clarity	Low precision
3	Medium relevance	Medium costs	Medium availability	Medium accuracy	Medium clarity	Medium precision
4	Very relevant	Considerable/Serious costs	Large availability	Mostly accurate	Mostly clear	Mostly precise
5	Fully relevant	Very high costs	Fully available	Fully accurate	Fully clear/comprehensive	Fully precise

RELEVANCE OF THEMATIC GROUP OF INDICATORS (1 – irrelevant; 4 – high relevance,):



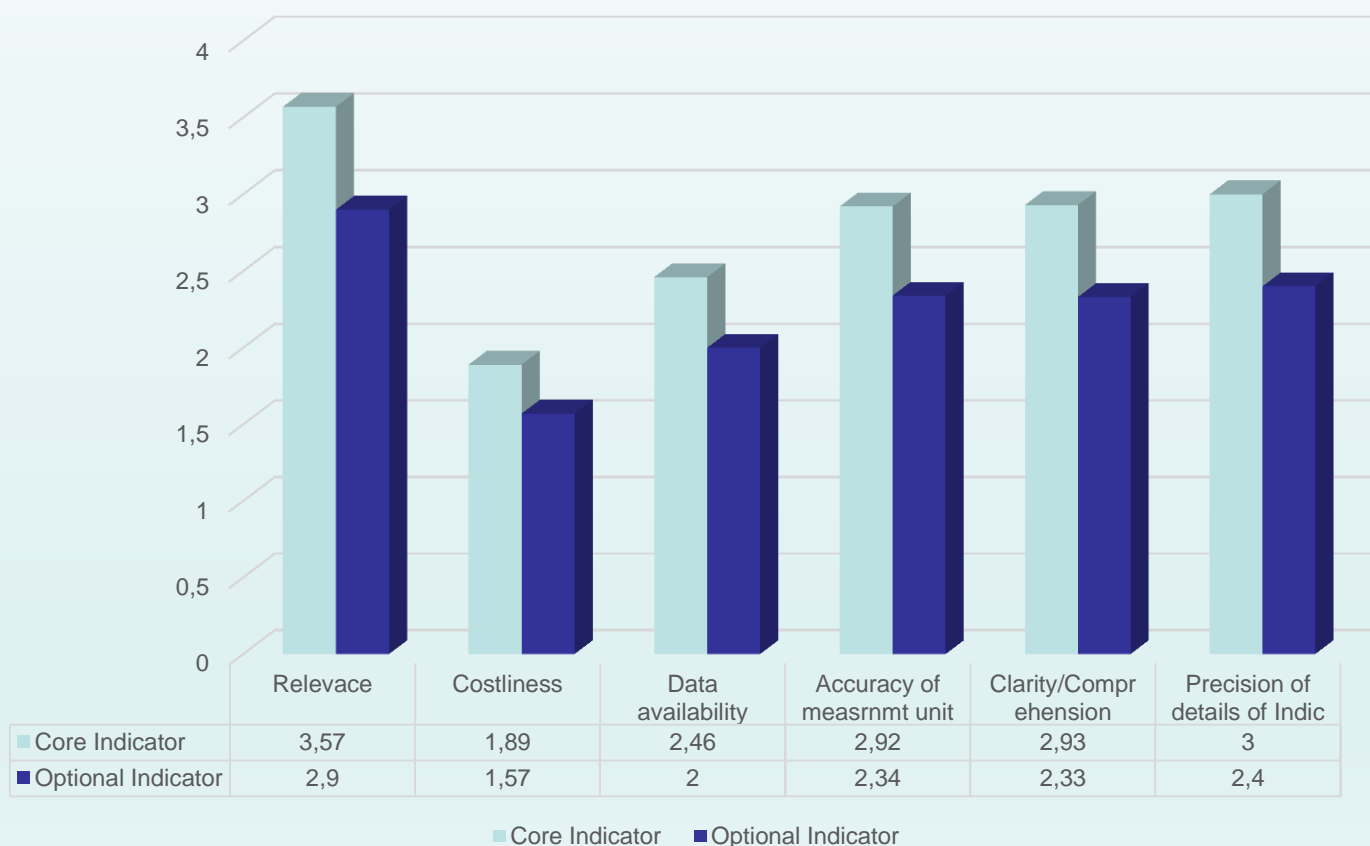
**A NEW GROUP OF INDICATORS WAS SUGGESTED: INNOVATIONS
and ENTREPRENEURSHIP**

THEMATIC GROUP OF INDICATORS IMPROVEMENTS/NEW INDICATORS:

- **Group A: Destination management**
 - Internationalization index (core)
- **Group B: Economic Value**
 - Gini index of seasonality (core)
- **Group C: Social & Cultural Impact**
 - Number of classified (UNESCO) historical buildings or sites in destination (core)
 - Number of classified (UNESCO) immaterial goods in destination (optional)
- **Group D: Environmental Impact**
 - Length of cycle tracks in destination (core or optional)

MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS A: DESTINATION MANAGEMENT (1 – the worst; 5 – the best)

Average note for core & optional indicators

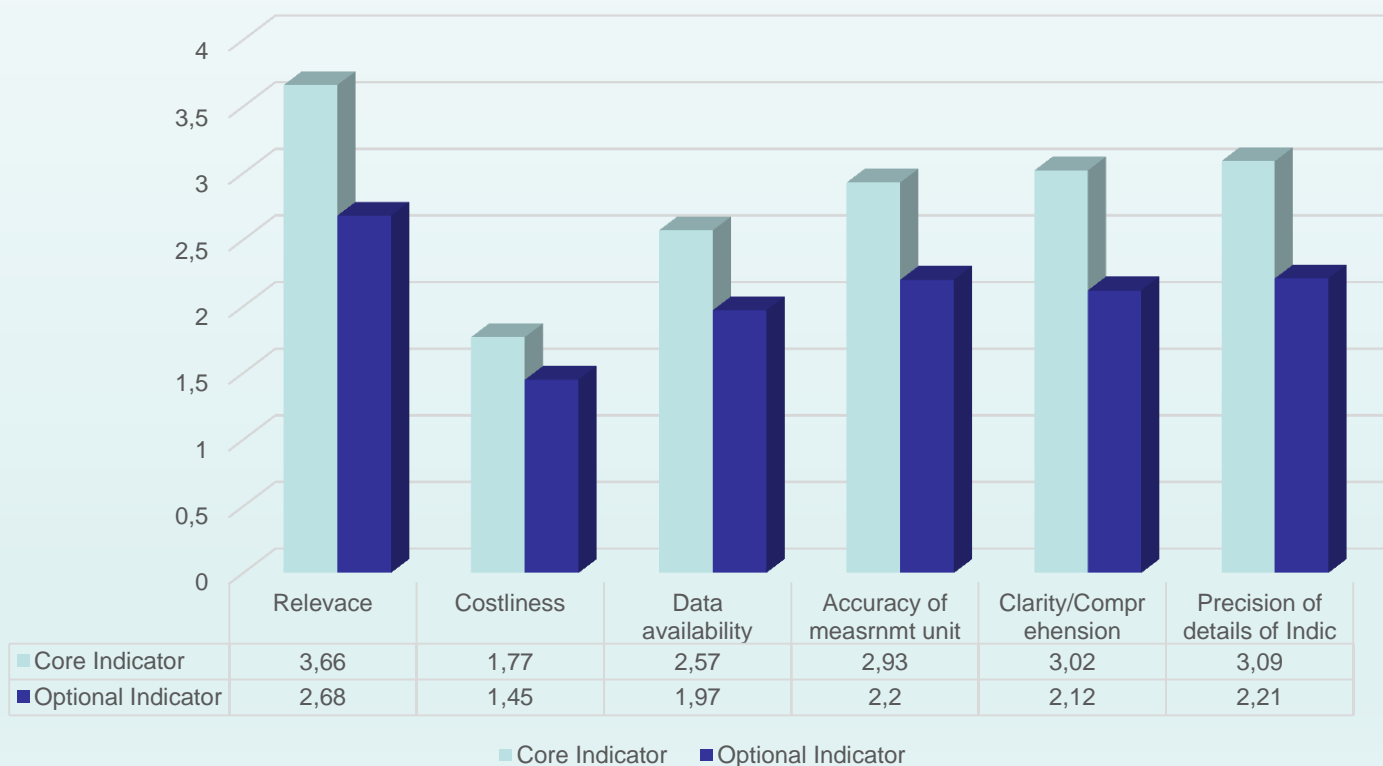


MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS A: DESTINATION MANAGEMENT (1 – the worst; 5 – the best)

A: DESTINATION MANAGEMENT	Relevance	Costs	Data availability	Accuracy	Clarity/comprehension	Precision
A1.1. (core): Share of destinations with su	3,57	1,48	2,74	3,30	3,00	3,09
A1.1.1. (opt): Share of inhabitants satisfied	2,83	1,65	1,91	2,48	2,61	2,57
A 1.1.2. (opt): Share of destination repres	2,74	1,17	2,43	2,26	2,00	2,17
A 2.1. (core): Share of tourism establishme	3,39	1,91	2,48	2,70	2,70	2,91
A 3.1. (core): Share of visitors satisfied wit	3,87	2,09	2,43	2,96	3,13	3,09
A 3.1.1. (opt): Percentage of repeat/return	3,22	1,87	1,65	2,26	2,57	2,52
A 4.1. (core): Share of visitors who are awa	3,43	2,09	2,17	2,74	2,91	2,91
A 4.1.1. (opt): Share of businesses commu	2,83	1,57	2,00	2,35	2,13	2,35

MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS B: ECONOMIC VALUE (1 – min; 5 – max)

Average note for core & optional indicators

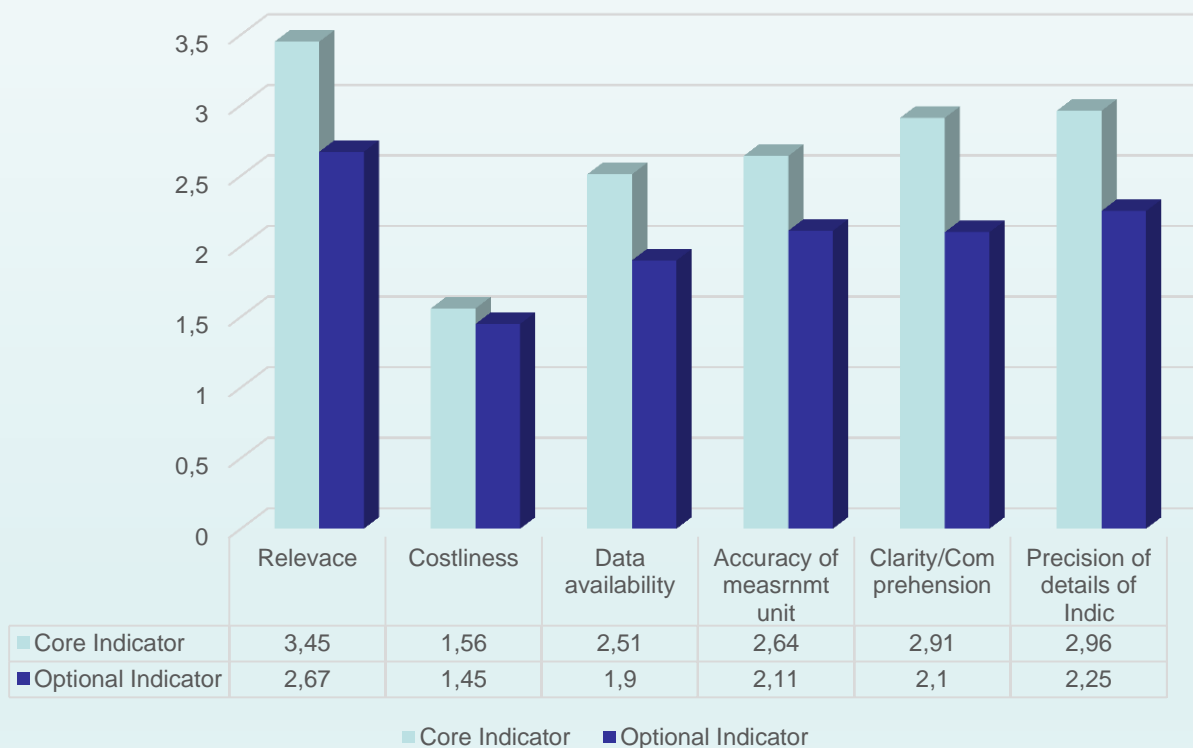


MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS B: ECONOMIC VALUE (1 – the worst; 5 – the best)

B: ECONOMIC VALUE	Relevance	Costs	Data availability	Accuracy	Clarity/comprehension	Precision
B 1.1. (core): Number of tourist nights per	3,83	1,74	2,87	3,22	3,09	3,30
B1.1.1. (opt): Relative contribution to dest	3,22	1,61	1,83	2,13	2,04	2,26
B 1.1.2. (opt): Number of same day visitor	2,87	1,87	1,91	2,26	2,17	2,39
B 1.1.3. (opt): Daily spending per same da	2,91	1,78	1,70	2,04	2,09	2,17
B 1.2. (core): Daily spending per tourist (a	3,83	2,13	2,09	2,61	3,00	2,91
B 2.1. (core): Average length of stay of tou	4,04	1,65	3,22	3,26	3,26	3,57
B 2.1.1. (opt): Average length of stay of sa	2,65	1,65	1,52	1,70	1,83	2,00
B 2.1.2. (opt): Share of 10 largest tourism b	2,65	1,52	2,13	2,22	1,91	2,04
B 2.2. (core): Occupancy rate in commerci	3,83	1,78	2,70	2,91	2,87	3,09
B 2.2.1. (opt): Average price per room in c	2,91	1,43	2,65	2,65	2,57	2,57
B 3.1. (core): Share of direct tourism empl	3,61	1,74	2,39	2,78	3,00	2,91
B 3.1.1. (opt): Share of seasonal jobs in toi	3,00	1,30	2,43	2,61	2,43	2,61
B 3.1.2. (opt): Share of tourism enterprise	2,09	1,09	1,74	2,09	2,04	2,22
B 4.1. (core): Share of tourism enterprises	2,96	1,52	2,22	2,70	2,78	2,70
B 4.1.1. (opt): Share of tourists who regist	2,30	1,22	1,83	2,22	2,13	1,96
B 5.1. (core): Share of tourism enterprises	3,52	1,83	2,48	3,04	3,17	3,17
B 5.1.1. (opt): Share of destination covere	2,48	1,39	2,13	2,17	2,09	2,00
B 5.1.2. (opt): Share of tourism enterprise	2,43	1,13	1,78	2,09	2,04	2,04

MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS C: SOCIAL & CULTURAL IMPACT (1 – min; 5 – max)

Average note for core & optional indicators

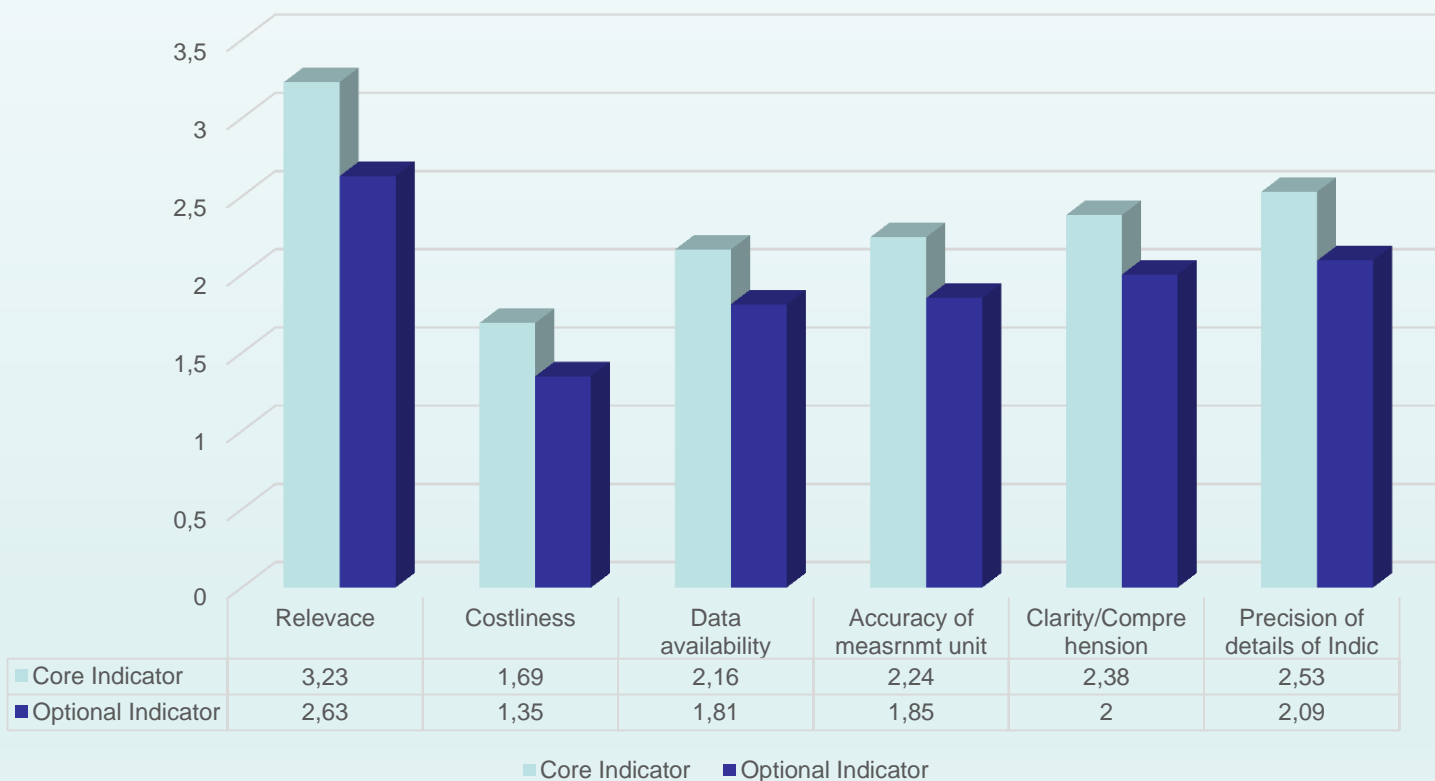


MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS C: SOCIAL & CULTURAL IMPACT (1 – the worst; 5 – the best)

C: SOCIAL & CULTURAL IMPACT	Relevance	Costs	Data availability	Accuracy	Clarity/comprehension	Precision
C 1.1. (core): Number of tourists/visitors per 100 residents	3,17	1,57	2,87	2,96	3,09	3,13
C 1.1.1. (opt): Share of residents who are satisfied with the number of tourists/visitors	3,09	1,65	2,00	2,57	2,35	2,52
C 1.1.2. (opt): Number of beds available in hotels and other accommodation	2,57	1,30	2,48	2,52	2,26	2,39
C 1.1.3. (opt): Number of second/rental homes	2,35	1,17	1,65	2,04	1,61	1,96
C 2.1. (core): Share of men/women employed in tourism	3,30	1,35	2,30	2,70	2,91	3,00
C 2.1.1. (opt): Share of tourism enterprises with employees	2,43	1,17	1,87	2,57	2,48	2,57
C 2.1.2. (opt): Average wage/woman vs average wage/man	1,96	1,30	1,35	1,61	1,57	1,78
C 3.1. (core): Share of commercial rooms occupied by tourists	3,74	1,65	2,65	2,91	3,09	3,13
C 3.1.1. (opt): Share of destination public spaces used by tourists	2,83	1,39	1,74	1,65	2,00	2,09
C 3.2. (core): Share of tourist attractions and services	3,65	1,65	2,26	2,17	2,83	2,78
C 3.2.1. (opt): Share of visitors satisfied with the quality of services	2,91	1,65	1,70	1,78	2,17	2,13
C 4.1. (core): Share of destination covered by cultural heritage	3,39	1,57	2,48	2,48	2,65	2,74
C 4.1.1. (opt): % of residents - positive/negative opinion on the cultural heritage	3,04	2,04	1,78	1,91	2,13	2,30
C 4.1.2. (opt): Share of destination big events focused on cultural heritage	2,87	1,35	2,52	2,30	2,30	2,52

MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS D: ENVIRONMENTAL IMPACT (1 – min; 5 – max)

Average note for core & optional indicators



MAGNITUDE OF PROBLEMS WHEN MONITORING INDICATORS D: ENVIRONMENTAL IMPACT (1 – the worst; 5 – the best)

D: ENVIRONMENTAL IMPACT	Relevance	Costs	Data availability	Accuracy	Clarity/comprehension	Precision
D1.1. (core): Share of tourist&same day vi	3,04	2,26	1,78	2,13	2,17	2,35
D1.1.1. (opt):Share of visitors using sof loc	2,57	1,61	1,35	1,57	1,91	1,87
D 1. 2. (core): Average distance by tourist	2,91	1,96	2,00	2,22	2,39	2,57
D 1.2.1. (opt): Average distance of same d	2,30	1,61	1,39	1,57	1,87	1,96
D 2.1. (core): Share of tourism enterprises	3,17	1,91	1,78	2,13	2,09	2,26
D 2.1.1. (opt): Share of destination include	2,87	1,61	2,00	2,00	2,04	2,17
D 2.1.2. (opt): Share of tourism accommod	2,65	1,39	2,17	1,61	1,83	2,00
D 3.1. (core): Waste volume produced by c	3,48	1,61	3,00	2,61	2,74	2,83
D 3.1.1. (opt): Share of tourism enterprise	3,04	1,39	2,39	2,13	2,39	2,35
D 3. 2. (core): Volume of waste recycled	3,48	1,48	2,39	2,43	2,52	2,70
D 4.1. (core): Share of sewage from destin	3,26	1,61	2,13	2,17	2,35	2,48
D 4.1.1. (opt): Share of commercial accom	2,52	1,26	1,61	1,65	1,78	1,96
D 5.1. (core): Fresh water consumption/to	3,30	1,91	1,74	2,09	2,39	2,57
D 5.1.1. (opt): Share of tourism enterpr - l	2,74	1,57	1,87	2,35	2,39	2,48
D 5.1.2. (opt):Share of tourism enterprises	2,48	1,30	1,65	1,87	1,91	1,96
D 5.1.3. (opt): Share of water use derived	2,17	1,04	1,35	1,57	1,57	1,74
D 6.1. (core): Energy consumption/tourist	2,96	1,91	1,35	1,87	2,22	2,30
D 6.1.1. (opt): Share of tourism enterprise	2,96	1,48	1,87	2,26	2,52	2,43
D 6.1.2. (opt): Share of energy consumed f	3,00	1,70	1,70	1,61	1,83	2,04
D 7.1. (core): Share of destination area de	3,43	1,30	3,22	2,78	2,70	2,91
D 7.1.1. (opt): Share of tourism enterprise	2,78	1,30	1,96	1,91	2,09	2,17
D 7.1.2. (opt): Share of destination cover	3,00	1,17	2,48	2,22	2,30	2,35
D 8.1. (core): Destination has active policy	3,39	1,22	2,48	2,35	2,57	2,65
D 8.1.1. (opt): Share of destin&residents c	2,52	1,09	1,91	1,91	2,13	2,13
D 9.1. (core): Level of contamination/100 r	3,04	1,39	1,91	1,87	2,00	2,22
D 9.1.1. (opt): Number of days beach/shor	1,87	0,74	1,43	1,52	1,48	1,74

CORE INDICATORS PROPOSED TO BE REMOVED:

- **Group A: Destination management**
 - A.2.1 Percentage of tourism enterprises/establishments in the destination using a voluntary verified certification/labelling for environmental/quality/sustainability and/or CSR measures
- **Group B: Economic Value**
 - B.2.2 Occupancy rate in commercial accommodation per month and average for the year
 - B.4.1 Percentage of tourism enterprises inspected for fire safety in the last year
- **Group C: Social & Cultural Impact**
 - None
- **Group D: Environmental Impact**
 - D.4.1 Percentage of sewage from the destination treated to at least secondary level prior to discharge
 - D.6.1 Energy consumption per tourist night compared to general population energy consumption
 - D.9.1 Level of contamination per 100 ml (faecal coliforms, campylobacter)

There are several more optional indicators proposed to be removed

All removals, comments and suggestion are proposed by destinations: Sermoneta, Abano Terme, Alentejo, Burren Geopark and Dervena and Svencele Village

INDICATORS PROPOSED TO BE CHANGED:

- **Group A: Destination management**

- A.3.1 - % of visitors satisfied with overall experience - This indicator can be turned into optional one. Core indicator expressed as „% of visitors that are aware and satisfied with the sustainable tourism development efforts in the destination“

- **Group B: Economic Value**

- B.4.1. - % of tourism enterprises inspected for fire safety - this indicator can be turned into an optional one; a more general indicator can be added as the core indicator such as “percentage of tourism enterprises taking physical measures for health and safety issues”
- B.4.1.1 - % of tourists with registered complaint with the police - to become core
- B.5.- Tourism supply chain indicator 5.1. change to optional one and B.5.1.2 to core indicator (maybe both can be merged)

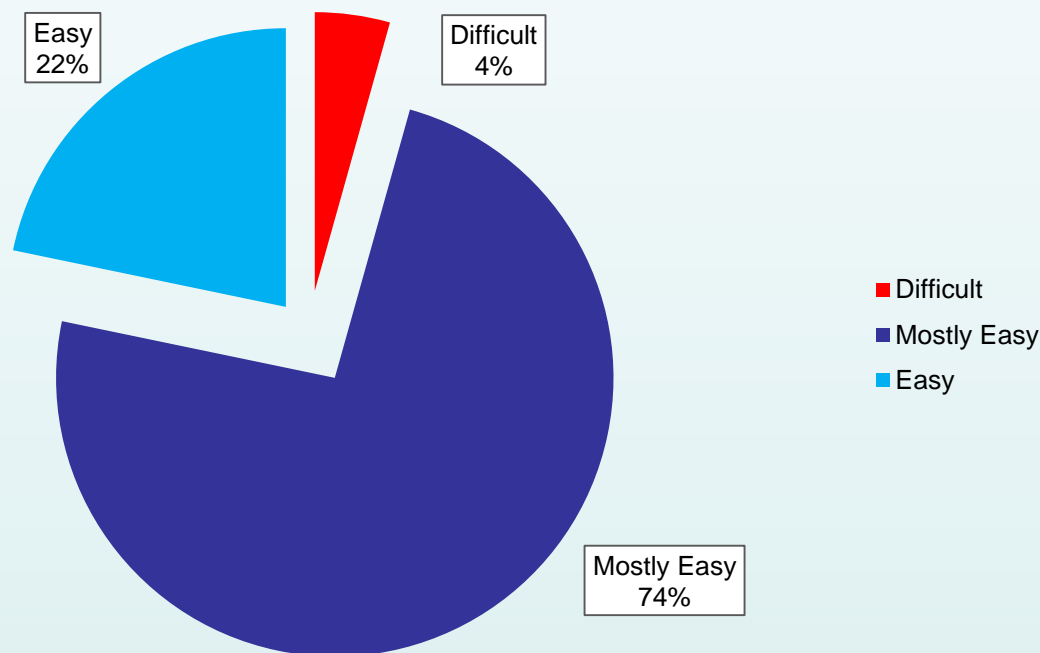
- **Group C: Social & Cultural Impact**

- C.1.1.1 indicators (resident satisfaction) would be a more appropriate universal - core indicator than C. 1.1. - number of tourists/visitors per 100 residents, which should become optional indicator,

- **Group D: Environmental Impact**

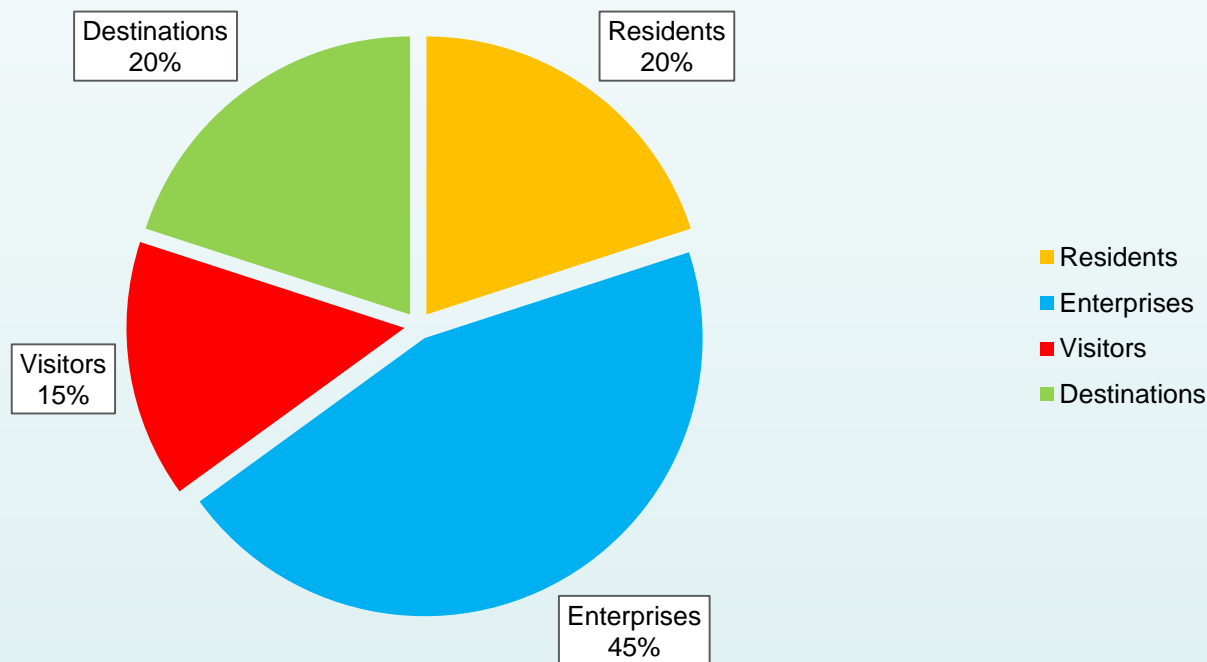
- D.6. - Energy use indicator D.6.1. change to optional one and D.6.2 to core indicator

HOW EASY IT WAS TO FILL DATA SHEET?



ONLY 1 DESTINATION FOUND IT DIFFICULT AND 5 EASY OUT OF 24 DESTINATIONS. 19 DESTINATIONS STATED THAT ON-LINE ICT TOOL WOULD BE USEFUL TO RECORD DATA.

HOW SURVEYS ARE EASY TO USE AND USEFUL?



THE MOST PROBLEMS ARE WITH ENTERPRISE SURVEYS, FOLLOWED BY RESIDENTS AND DESTINATIONS. THE LEAST PROBLEMS ARE WITH VISITORS SURVEYS. 16 DESTINATIONS STATED THAT VARIOUS SURVEYS ARE EASY TO USE AND USEFUL.

- the ETIS system has been welcomed in 1st pilot implementation phase by 104 destinations
- it provides a dynamic tool to secure broader stakeholder engagement in destinations and to monitor and understand performance and sustainability issues
- the tool needs to be improved and developed further with stronger support to destinations on how to interpret indicators and use ETIS tool
- it is important to clarify benefits and added value for destinations, and for public and private stakeholders
- it needs to be promoted more widely and more effectively at all levels

- it needs to be clearly positioned, supported and promoted by the Commission
- there should be ICT support and development to assist in data recording and benchmarking
- it should be adopted by destinations as an everyday, practical tool as part of effective destination management
- Costs for ETIS implementation, use and further development are important
- the ETIS pool of experts should be used more positively to support the development and implementation of the ETIS system

ETIS pilot implementation should be a continuous process in which EC ETIS team, ETIS Pool of Experts and NTOs should guide, support, monitor and award:



Thank you for your attention!

Welcome questions, remarks, comments, suggestions!

Data base organization and analysis were done by Janez Sirše assisted by Nina Pečoler. Members of ETIS Pool of Experts contributed their views and observations to analysis, conclusions and recommendations.