Blue Plan Papers 12

TOWARDS AN OBSERVATORY AND A "QUALITY LABEL" FOR SUSTAINABLE TOURISM IN THE MEDITERRANEAN

Ioannis Spilanis, Julien Le Tellier

PLAN BLEU
UNEP/MAP Regional Activity Centre

June 2012

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Executive summary

The "Profile of Sustainability in some Mediterranean Tourist Destinations" project comes out of the recommendations of the Mediterranean Strategy for Sustainable Development (MSSD) adopted in 2005 by the Contracting Parties of the Barcelona Convention. The objective is to assess the sustainability of tourism in several destinations[1] but also to provide a common tool for the monitoring and promotion of sustainable tourism in the Mediterranean. The orientations and actions of the MSSD for promoting sustainable tourism include the following recommendation: "Draw up (…) 10-year promotional framework program for the Mediterranean (…) highlighting the assets of Mediterranean cultural and environmental heritage, with a view to developing a Mediterranean tourism quality label". This orientation leads Plan Bleu to raise the issue of "labelling" (certification of the sustainability of Mediterranean tourist destinations), which would constitute the final stage of the process.

The "Profile of Sustainability in some Mediterranean Tourist Destinations" project is based on systemic and territorial approaches, which consider the destination as the basic unit for assessing the development of tourism. The relations between the Mediterranean tourist system and the other priority fields in the MSSD (water, transport, waste, energy, urban and rural development, etc.) and the various stakeholders have to be addressed at several levels: local, national, regional, and global.

The aim of the project is to measure and assess the results, performance and impacts of tourism, and to link it with the sustainable development of the destinations. The proposed approach addresses environmental, economic and social parameters.

Firstly, the tourism is considered as a driving force. Secondly, its results and performance within the destinations have to be measured following the three pillars of sustainable development: economic, social and environmental components. Thirdly, the impacts of tourism are estimated in order to assess the sustainability of the destinations. Finally, conclusions are drawn in terms of multi sectoral policy measures that could improve the performance or impacts of tourism within the destinations. Policy measures have to be focused on addressing specific problems affecting the sustainability of the destinations.

1 Alphabetic order: Alanya (Turkey), Cabras and Castelsardo (Italy), Djerba (Tunisia), El Alamein, Marsa Matrouh and Siwa Oasis (Egypt), Rovinj (Croatia), Tetouan coastal area (Morocco), Tipasa (Algeria), Torremolinos (Spain).

We proposed a global framework, the **Tourism Sustainability Assessment and Policy Approach**, a methodology based on an extended version of the DPSIR approach (Drivers, Pressures, State, Impacts, Responses), with common definitions of sustainable tourism and sustainable destinations. Since the destination is considered to be the basic unit for tourism development, a systemic and territorial approach was adopted, requiring the role of internal and external stakeholders to be identified. Next, a wide range of economic, social and environmental variables and indicators were proposed to measure supply and demand in tourism (tourism as a driving force), the results and performance of tourism, and finally the impact of tourism on the destination's sustainability.

As a result of this process, we suggested a classification of the selected destinations within three groups:

- Alanya, Djerba, Torremolinos, the **3S (Sea, Sun and Sand) resorts offering an international (global) product**, are mature destinations where many variables indicate a saturation even a decline of the economic, social and environmental sustainability of the whole host area (economic and social performance falling, serious environmental problems, problems in attracting tourists, high costs for "rejuvenation" to maintain their attractiveness, and issues of quality of life for residents), following a period of major economic growth that has totally transformed the destinations, their economy, environment and society.
- El Alamein, Marsa Matrouh, the Tetouan coastal area and Tipaza, the **3S resorts/towns with a domestic character**, are destinations where the predominance of increasing domestic demand has led to a large number of residential homes rather than to the development of the tourism economy, threatening the destination sustainability. This type of offer, dictated more by real estate developers than by a planned tourism development process, has negative impact on the environment without generating clear positive socio-economic results: black economy, low employment, and low impact on the economy in general.
- Cabras, Castelsardo, Rovinj, Siwa Oasis, with a **distinctive tourism product and local character**. Their common feature is that all of them have promoted their destination based on their cultural and natural assets, rather than on the "sun, sea, sand" mantra. In these destinations,

the “place” matters and tourism activity seems to be better integrated into the local economy with high performance, which might be considered as a route towards sustainable development. The main “disadvantage” is the lower socio-economic results compared to other destinations, due to high seasonality.

Within the national and the international context, the various stakeholders have a very significant role in the development and current situation of the destinations:

- **National authorities** have played a crucial role, mainly in countries with a centralised political system: Southern & Eastern Mediterranean Countries (SEMCs) in particular. Their impact on the destinations varies, since different approaches to planning give different results, even if the main goals (short-term economic results, currency inflow, employment, economic activity, regional development) seem to be the same almost everywhere.
- (International and national) **Tour Operators** have initiated, supported and controlled the development of tourism, mainly in the first category of destinations, with both positive effects (short-term impacts during development phase) and negative effects (long-term impacts through the standardisation and *massification* of the product). They have put the destinations on the global tourism map, creating demand, low seasonality, high employment and revenue, but also low per capita revenues, high economic leakages, dependence and environmental pressure.
- (International and national) **Real Estate Agencies** have gradually replaced both traditional hoteliers and also the local but anarchic investment in residential homes, creating a new situation in most of the 3S destinations, undermining tourism but also the national economy and the environment.

Other stakeholders generally have a less important role, although the **strengthening of local authorities** and the **increasing awareness of tourists** (and also their transformation from passive consumers to active seekers of “different” and authentic products) will be significant parameters in years to come.

The principles behind the preliminary guidelines proposed are as follows:

- To develop a diversified offer (**supply**), drawing on territorial/local economic, social, cultural and environmental specificities to produce a high-quality tourism product, and on authentic and high added value tourist services that incorporate innovations and skilled labour, and respect the carrying capacity of the destinations (scale of the activity);
- To attract tourists (**demand**) from the global market, who want to discover the different and specific “products” that Mediterranean destinations have to offer;
- To promote the distinctive locally specific “brands” of the different destinations under the overall umbrella “Brand” of the “Mediterranean Destination of Excellence”, rich and famous not only because of its glorious past but also for what it is today (***territorial marketing***).

Finally, it is suggested that all players have to change their usual practices in order to adopt a more sustainable attitude. Examples of possible paths are listed below:

- For the private tourist sector, the principles of the “**Responsible Business**” could be followed in order to improve performance;
- For local authorities, the concept of a “**Quality Mediterranean Destination**” could be the guide for the necessary improvements (*rejuvenation*) in the destinations;
- For tourists, the “**Mediterranean Passport**” could improve awareness;
- For investors, the “**Sustainability Assessment**” could guide their future actions.

In this context, it is suggested Plan Bleu to contribute to:

- Offering recommendations, guidelines, decision-support tools such as sets of indicators and, upon request, technical support to interested bodies (countries, regions, professionals, NGOs, etc.);
- Designing and implementing regional actions to promote sustainable development in the Mediterranean, as well as a different image of Mediterranean tourism, assisted by a “Mediterranean Observatory of the Tourism Sustainability” as a monitoring tool.

Finally, these recommendations could be developed into a “Charter of sustainable Mediterranean tourism” (or terms of reference for an action plan directed towards sustainable tourism’s improvement) at the destinations and/or Mediterranean region scale. It would be based on territorial marketing approach, aimed at making wealth and jobs creation compatible with environmental conservation in the destinations, as well as being supported by future certification schemes and monitoring systems to follow the Mediterranean destinations’ state of sustainability. In terms of decision support, these tools would have to help local and national authorities assessing a destination’s economic – as well as social and environmental – impact due to/from tourism development (or “rejuvenation”).

Introduction: context and objectives

In the context of the Plan Bleu programme of activities “Tourism and Sustainable Development in the Mediterranean” (2009-2011), the “Profile of Sustainability in some Mediterranean Tourist Destinations” project comes out of the recommendations of the Mediterranean Strategy for Sustainable Development (MSSD) adopted in 2005 by the Contracting Parties of the Barcelona Convention.

The objective is to assess the sustainability of tourism in several destinations[2] but also to provide a common tool for the monitoring and promotion of sustainable tourism in the Mediterranean. The orientations and actions of the MSSD for promoting sustainable tourism include the following recommendation: “Draw up (…) a 10-year promotional framework program for the Mediterranean (…) highlighting the assets of Mediterranean cultural and environmental heritage, with a view to developing a Mediterranean tourism quality label”. This orientation leads Plan Bleu to raise the issue of “labelling” (certification of Mediterranean tourist destinations), which constitutes the final stage of the process.

The “Profile of Sustainability in some Mediterranean Tourist Destinations” project is based on systemic and territorial approaches (*Figure 1*), which consider the destination as the basic unit for assessing the development of tourism. The relations between the Mediterranean tourist system and the other priority fields in the MSSD (water, transport, waste, energy, urban and rural development) and the various stakeholders have to be addressed at several levels: local, national, regional, and global.

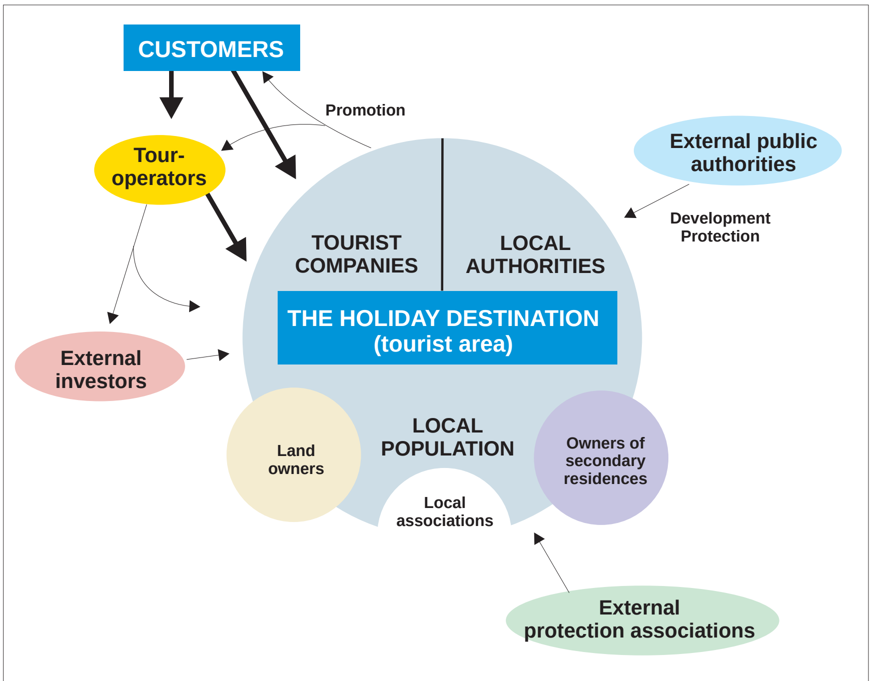
The main objective is to assess the economic, ecological and social footprint of tourism activities via detailed analysis of eleven destinations located in eight Mediterranean countries. The “profiles of sustainability” correspond to territorial assessments of different situations – in terms of maturity and life cycle of the destinations (longitudinal approach), the spatial and temporal distribution of tourism flows and seasonality effects, the economic benefits for local society, development of local potentials of each destination – for identifying the strengths and weaknesses of each model in terms of spatial and temporal distribution of tourist flows, patterns of “rejuvenation” (diversification) of destinations, and uses of natural, cultural and historical heritage

Following these diagnoses, policy measures are proposed for improving the economic performance of tourism, enabling a more equitable distribution of incomes, contributing to the welfare of local society and containing the pressure on the environment as well as minimizing the environmental damage. The final step is to prepare a “profiles of sustainability” synthesis in order to develop a regional framework promoting sustainable tourism in the Mediterranean.

Main steps of the project and contents of its final report are structured as follows:

Firstly, tourism is considered as a driving force. Secondly, results and performance within the destinations have to be measured in terms of the three pillars of sustainable development: economic, social and environmental components.

Figure 1 Tourism system: stakeholders and operational scales



Source: Ph. Moisset, Plan Bleu

2 Alphabetic order: Alanya (Turkey), Cabras and Castelsardo (Italy), Djerba (Tunisia), El Alamein, Marsa Matrouh and Siwa Oasis (Egypt), Rovinj (Croatia), Tetouan coastal area (Morocco), Tipasa (Algeria), Torremolinos (Spain).

Thirdly, the impacts of tourism are estimated in order to assess the sustainability of the studied destinations. Finally, conclusions are drawn in terms of policy measures that could improve the performance and impacts of tourism within the destinations. Policy measures have to be focused on addressing specific problems affecting the sustainability of the destinations.

The profile of sustainability is based on a variant of the so-called DPSIR framework (Driving forces, Pressures, State, Impacts, Responses) in order to assess the economic, environmental and social footprint of tourism and its impacts in a destination; it aims to identify the correlations between the results and impacts of tourism on an area and for different types of destinations.

Based on an experimental method (Part I), the objective is to propose a differentiated and detailed assessment of a range of Mediterranean tourist destinations in terms of economic, environmental and social sustainability through a common framework regardless of the specific characteristics and stage of development of each destination (Parts II and III). The main aim is to identify how to improve the performance and mitigate or reduce the impacts of tourism to enhance the welfare of the local communities in a sustainable development perspective. Finally, one of the main goals of the project is to provide a common tool for following up the promotion of sustainable tourism in the Mediterranean (Parts IV and V).

Part I "The assessment framework for tourism" explains the methodological context in which Plan Bleu works and the aims of the study: what we want to do and why. The way in which a profile of sustainability is drawn up for a tourist destination is described step by step, with explanations on the variables and indicators to be taken into account.

Part II "Tourism as a driving force" provides an integrated analysis and classification of the different destinations based on quantitative and qualitative information about the tourism business: supply and demand. This information is taken from the case studies carried out by tourism experts in five steps:

- ***Step 1. Selection and description of the destinations***. The studied destinations had to be an equivalent NUTS 3 level administrative unit[3] without a major city, or an equivalent NUTS 5 local administrative unit[4], where national and/or international tourism is already a significant activity and with permanent population. The experts provided a description of the destination, including geographical features and transport links, as well as a map showing the boundaries of the destinations.
- ***Step 2. Tourism as a driving force in the destinations***. The experts collected data about tourism supply and demand within the destinations in order to show the main characteristics and the complexity of tourism activities; the data used is presented in appendices. The objective was to analyse all the data to show how the driving forces have influenced the development of the destinations.
- ***Step 3. Economic, social and environmental results and performance of tourism in the destinations***. The results and performance of tourism were estimated according to the three pillars of sustainable development: expenditure (economic), employment (social), consumption of natural resources and changes in land use (environmental).
- ***Step 4. Impact of tourism on the sustainability of the destinations***. The experts analysed how tourism has influenced economic efficiency, social equity, and the environmental goods and services of the destinations. They looked at whether and to what extent tourism has influenced any changes in GDP and the structure of the local economy, changes in the population and income distribution, as well as the availability and state of natural resources.
- ***Step 5. Policy measures***. The experts analysed the results of the work undertaken in the previous steps in order to describe the main characteristics of the destination (profile), to explain where the sustainability problems lie, and to propose several options in terms of policies, institutions and processes for improving the level of sustainability of the destinations.

Part III "Tourism performance and impacts" focuses on (a) analysing the results of tourism in the various destinations in order to assess the sustainability of tourism through a comparative approach, and (b) analysing the impacts of tourism on the destinations sustainability. An attempt is also made to analyse the different clusters of destinations in order to clarify the role of the various internal and external stakeholders operating in the different situations.

Part IV "Policy implementation" focuses on assessing the policy measures applied by national and local authorities and on the experts' proposals.

Part V "Creation of an observatory and a "quality label" for Mediterranean sustainable tourism?" focuses on recommendations concerning the possible development of a "quality label" and a monitoring system for Mediterranean tourism and its sustainability.

3 Department, province, *nome, wilaya*, governorate, district, *comitat*, canton, *mohafazat*.

4 Commune, municipality.

The sustainability assessment framework for tourism

Assessing the impact of tourism in an area (country, region or destination) is a very important task and a prerequisite for anyone wishing to take measures in order to achieve a better level of sustainability.

Usually, when international, national and local institutions and experts try to measure the performance of tourism, they are referring first of all to the number of (international) tourists in the area in comparison with the previous years and in comparison with the equivalent changes in other – usually competing – destinations. The economic performance of the activity is generally assessed using parameters such as tourism expenditure, and its impacts on various indices, such as GDP, investments, foreign currency inflow, imports, tax revenue, etc. Social performance is also considered to be a very important parameter: direct employment created and its qualitative characteristics (sex, age, qualification level, seasonality, residence), and the indirect effects on social structure and behaviour.

In recent years, the concept of “sustainable tourism” has significantly changed the way the impact of tourism is assessed: not only does the environmental performance of the activity and its impact on the host community have to be assessed alongside the economic and social performance, but there is also a need to incorporate a long-term perspective, particularly of the impact on the host area, within the approach. Consequently, a lot of literature has been produced in recent years by academics and by different international organizations such as UNWTO, UNEP, UNESCO, EU, etc., in order to provide in-depth analysis of the applicability of principles of sustainability in tourism and to elaborate policy guidelines.

In this section, the emphasis is placed firstly on presenting an operational approach to the notion of sustainable tourism and secondly on drawing up an experimental framework for assessing the performance of the tourism industry and its impact on the host area, for assessing the sustainability of tourism and developing a policy approach. Thirdly it gives the guidelines about data and other information that has to be collected in order to create the profile of sustainability of a destination.

“The evaluating framework of the tourism activity - Protocol for the Elaboration of the Profile of Sustainability in some Mediterranean Tourist Destinations” is available at Plan Bleu Website at: http://www.planbleu.org/publications:Note_Methodo_Profil_DurabiliteUK.pdf.

Operational definition of sustainability for measuring the performance and impact of tourism

The development of tourism is not an end in itself for any area (destination in our case). Its success should not only be examined in terms of the number of (international) tourists that visit the destination - even if this is an important indicator - but also in terms of its impact on the development of the host area (i.e. the economic welfare of the local community). The latter is based on the performance of the tourism activity, meaning the expenditure by tourists and the employment generated in the destination. According to conventional economics, the direct and indirect effects of tourism on GDP and on total employment in an area are the basic indicators for assessing the development of this area (as with any other business activity).

The worldwide emergence of the term “sustainable development” as a framework for the assessment of human welfare (in that an activity ceases to be exclusively economic, but acquires a social and environmental dimension), has led to two critical changes to the conventional approach:

- Firstly, the assessment of the impact of any activity (tourism in our case) cannot be based only on estimating its impact on the economic development of the area (economic efficiency), but also on its contribution to social equity (dissemination of the gains from development to different social groups) and to environmental conservation (maintenance of the functions of its ecosystem that are necessary for its ability to provide environmental goods and services – Costanza et al., 1997; TEEB, 2009).
- Secondly, the assessment refers not only to the short term (e.g. annual increase in income and employment), but also to the long term. The conditions of development for the needs of future

generations need to be ensured (inter-generational equity), mainly through the legacy of different quantities of man-made, human, natural and social capital (Turner et al., 1994; GHK, 2002).

But how can the performance of tourism be measured and valuated, and linked to the sustainable development of the area? Within the experimental methodological framework – based on an extended version of the DPSIR approach in order to include economic, social and environmental parameters (OECD, 1993; Peirce, 1998) –, for every activity taken to be a **driving force** (tourism in our case) the experts must first consider and measure the **results and performance** in terms of the three pillars of sustainable development. Secondly, the assessment should focus on the **impacts** of tourism results in the studied destinations. Finally, **policy measures** can be recommended either to improve the performance of tourism or its impact on the destinations. Policy measures have to target specific problems observed in a destination (e.g. lack or the inadequacy of tourism infrastructure, low levels of expenditure by tourists, high levels of seasonality, pressures on protected areas, high water consumption) that can affect the sustainability of an area.

1. On an initial level, tourism has to be considered as one of the driving forces for economic, social and environmental changes that affect the state (and the sustainability) of the destination[5]. The changes are dependent on the development pattern, intensity of the activity and its performance. In the case of tourism, intensity can be measured by:
   - The number, type and size of the tourist infrastructure projects (hotels, restaurants, spas, marinas, golf courses, conference centres) and the general infrastructure projects (roads, ports, airports, energy production, telecommunications) constructed in order to meet the demand generated by tourism. These infrastructure projects permanently influence land use and the management of natural resources in the destination and create temporary economic output and employment in the construction sector;
   - The number of (domestic and international) tourists visiting the destination, measured by nights spent in the different types of accommodation.

In order to meet their needs, tourists:

- Spend money purchasing goods and services such as accommodation, transport, recreational activities, retail, and any other service that can be considered as a part of the tourism "product";
- "Use" human resources that are required for the supply of these services, and in so doing, create new jobs. These jobs have various characteristics related to the gender of the employees, duration of the employment, level of qualification needed, employee's position in the enterprise, salary level, etc.
- Consume natural resources (energy, water, land) and produce waste of various types.

These are the direct effects that each tourist generates in an area. Of course, all tourists do not have the same needs and the same behaviour, and therefore do not produce the same per capita effect. The sum of these effects constitutes the overall performance, the so-called "result" of the tourism activity, which is dependent not only on the number of tourists but also on their daily behaviour. The "result" (spending per capita and per night) can be considered as the basic unit of measurement that can facilitate comparison over time and between different geographical areas.

2. On a second level, the direct economic, social and environmental effects of the tourist activity also have an impact on the host area:
   - The total expenditure by tourists constitutes a factor for change in the local economy that can be measured by the change in GDP, the demand for non-tourist goods and services (indirect and induced demand), the emergence of new activities with a direct or indirect relationship to tourism as well as the discontinuation of existing ones, the diversification of private and public investment, etc. These changes affect the economic efficiency of the tourist destination and the structure of the GDP.
   - Total direct tourism employment is also a factor for change in the population structure of the destination, as it can change the percentage of active and employed population, the percentage of female and young employment, the migration flows, the total income and income distribution in the area, all of which affects the social equity and the cultural heritage of the destination[6].
   - Finally, the pressure on the environment is a factor for change in the environmental state of the area, specifically in its capacity to produce environmental goods and services for the population (provision of drinking water, absorption of waste and UV radiation, pollination, etc.). The major issues for

5 Agriculture, manufacturing and population needs are other main driving forces.

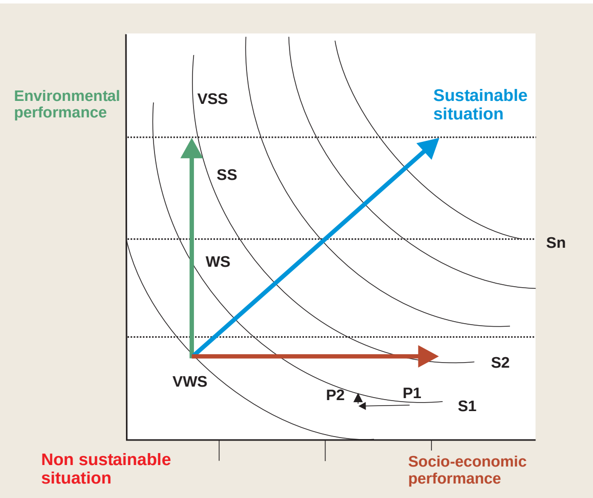
6 Changes in social structures and behaviour are not measured in this approach.

assessing the environmental preservation of the area are quality of the seawater, quantity and quality of drinking water, biodiversity in the area, soil quality, air quality, landscape and urban environment.

Even if the economic result of tourism is the same, the impact may be different between different destinations because the economic, social and environmental carrying capacity of the destinations differs. For instance, hotel capacity of 1,000 beds creating employment for 500 people has bigger socio-economic impact in a small city of 5,000 people than in a town of 1 million. The same is true for a daily water consumption of 25,000 litres; the impact is higher in a desert area than in a place where rain is abundant and there are large water reserves.

These changes have to be assessed in order to provide an assessment of the sustainability situation in different areas and improve their performance or, subsequently evaluate the efficiency of tourism policy measures and plans. Higher levels of sustainability and welfare in an area can be achieved through combined improvement of the sustainability parameters, as can be shown with a system of indifference curves (*Figure 2*).

Figure 2 Sustainable development and welfare



Legend:
VSS = very strong sustainability; SS = strong sustainability; WS = weak sustainability;
VWS = very weak sustainability
P1, P2 = point 1, point 2
S1, S2....Sn = sustainability curve 1, sustainabiity curve 2... sustainability curve n

Source: based on the "Barometer of Sustainability" (IISD, 1997; Sebastian & McArthur, 1998; Pinter et al., 2000).

The "Profiles of sustainability - Mediterranean tourist destinations" project highlights the idea of political regulation of economic growth and sustainable tourism. To link economic growth, human development and control of environmental damage, impact studies/assessments should be systematized both on environmental and social costs and economic impacts of tourism activities. This kind of studies could support public authorities to "anticipate not to regret" which needs for the definition of local systems of observation, as well as monitoring systems and prospective approaches on tourism activities.

When the economic, social and environmental performance of tourism is low, it is not sustainable. "Sustainable tourism" is tourism with high economic, social and environmental performance that contributes to the highest possible welfare and long-term sustainability of an area; there is no upper limit on sustainability. Based on international literature, it can be argued that mass-3S tourism is not sustainable because the economic gains for the host area are low, while the negative social and environmental impacts are high (Briassoulis, 1995; Nijkamp & Verdonkschot, 1995). Any positive shift along the system of axes (*Figure 2*), either by improving the performance of the 3S model, or by replacing it with another tourist product that has a better performance level (*rejuvenation*), is preferable, since it improves the existing situation and represents a move towards a more desirable situation.

Feasibility of the profiles of sustainability

The first task was to choose the destinations to be studied. The destination had to be administrative unit (anything from a large commune up to a NUTS 3 coastal zone), without a large city – such as Barcelona, Casablanca or Alexandria –, where domestic and/or international tourism is an already developed and significant activity. Once the area to be studied had been specified, all the data had to refer to this area. A brief description of the area including its geographical features and its transport links had to be provided, as well as a map with its boundaries.

The next step was to decide what kind of data and other information was necessary in order to assess tourism impacts on the destination. Firstly, good knowledge was required of the supply and of the demand of tourism services that are the **driving forces** of changes in the destination. The driving forces include:

- Tourism infrastructures, such as accommodation, marinas, conference centres, golf courses, restaurants, etc. The capacity of the infrastructure (number of beds, number of moorings) and the area occupied, as well as the category of the accommodation are required to assess the type of tourism in an area;

- Tourism resources, such as the cultural and natural assets of the destination that constitute its attractions;
- General infrastructure necessary for tourism activity, such as transport, energy, waste and sewage treatment systems and developments of these networks due to tourism;
- Number of tourist arrivals and nights spent by nationality or at least distinguished into domestic and international tourists, and by accommodation type. This data is necessary in order to estimate the intensity of the tourism activity, the duration of the season and the occupancy rate.

Secondly, the **results and performance** of the tourism activity had to be estimated, including:

- The economic effects, as represented by expenditure by tourists in the destination (by nationality and type of tourist, if available);
- The amount of direct employment generated by tourist demand in the accommodation sector, resorts, restaurants, bars, travel agencies, entertainment, car rentals, and other activities;
- The environment pressure caused by tourism, both permanent pressure (e.g. land use changes) and operational pressure (e.g. water and energy consumption, waste production), related to the number of tourists and their behaviour but also to the characteristics of the facilities (e.g. category of hotel).

In order to make comparisons over time, the performance of tourism needed to be expressed "per overnight" (e.g. expenditure or water and energy consumption per overnight stay), but also "per bed" (e.g. job creation per bed).

Thirdly, the overall **impact** of tourism on sustainability in the destination had to be addressed. The question to be answered was how tourism activity has influenced economic efficiency, social equity and environmental conservation in the destination.

- With regard to the **economic efficiency of an area**, the current effectiveness and competitiveness of the economy under the influence of tourism needed to be ascertained, and information needed to be provided about the future outlook.
- **Social justice/equity** concerns the dissemination of the benefits of economic growth due to tourism to the society in general; it has been seen in the structure of and changes to the population, and in social cohesion.
- **Environmental conservation** is about the capacity of the natural capital to ensure the supply of environmental goods and services to a specific society and to preserve ecosystem functions under pressure from tourism, in an effort to increase quality of life. Here, both the built and cultural environments were included alongside the natural environment, since they are not renewable resources and also contribute to the quality of life, as well as being crucial components of the tourism product.

Thus, the question to be answered was whether and to what extent tourism activity has influenced the changes in GDP and the structure of the local economy[7], changes in the population evolution and structure as well as income distribution, the availability of drinking water, soil quality, biodiversity, the landscape and the other components of the environment. This was not always easy, since the situation in any given area is the result of all local activities (including activities that meet the needs of the local community) but also of nationwide and worldwide economic, technological, demographic and environmental changes.

In order to collect the three types of data, information on the following "resources" had to be collected: services provided by national governments and local authorities, the tourist enterprises and finally the number of tourists. The first task was to collect existing data and other information from national and local authorities. This data then had to be analysed to help in understanding the main characteristics of each destination (profile), to identify the sustainability issues and to propose actions (policy measures) for improving the level of sustainability.

The final step of the study was a common presentation and analysis of all the case studies in order to highlight the common characteristics and disparities between Mediterranean destinations. SWOT analysis was used to shape the policy guidelines necessary to improve the sustainability of tourism. When all these studies were completed, the experience gained paved the way for developing a regional framework to promote sustainable tourism in the Mediterranean.

7 Very often tourism is "accused" of diminishing an area's traditional activities by creating a "mono-activity" situation that makes the local economy fragile and dependent on imports.

Tourism as a driving force

This section presents the 11 destinations studied, based on quantitative and qualitative information about the driving forces: supply (tourism infrastructure and attractions), demand (tourist arrivals and nights spent), and characteristics of the destinations to the extent that they determine the results of the development of tourism and its impact on the destinations.

The Mediterranean destinations: a short description

The experts studied the following eleven destinations (classified by annual nights spent):

Table 1 Mediterranean tourist destinations studied

Countries	Destinations	Location
Turkey	Alanya	South-West of Turkey, coastal area of Antalya
Tunisia	Djerba	Governorate of Medenine
Spain	Torremolinos	Junta de Andalusia, Costa del Sol, Malaga Province
Egypt	Marsa Matrouh	Matrouh Governorate
Croatia	Rovinj	Istria County
Morocco	The Tetouan Coastal Area	Tangiers-Tetouan Region, Provinces of Tetouan & Fnideq M'Diq(*)
Egypt	El Alamein	Matrouh Governorate
Algeria	Tipaza	North Centre Region, Wilaya of Tipaza
Egypt	Siwa Oasis	Matrouh Governorate
Italy	Castelsardo	Sardinia, Region of Sardinia
Italy	Cabras	Sardinia, Region of Sardinia

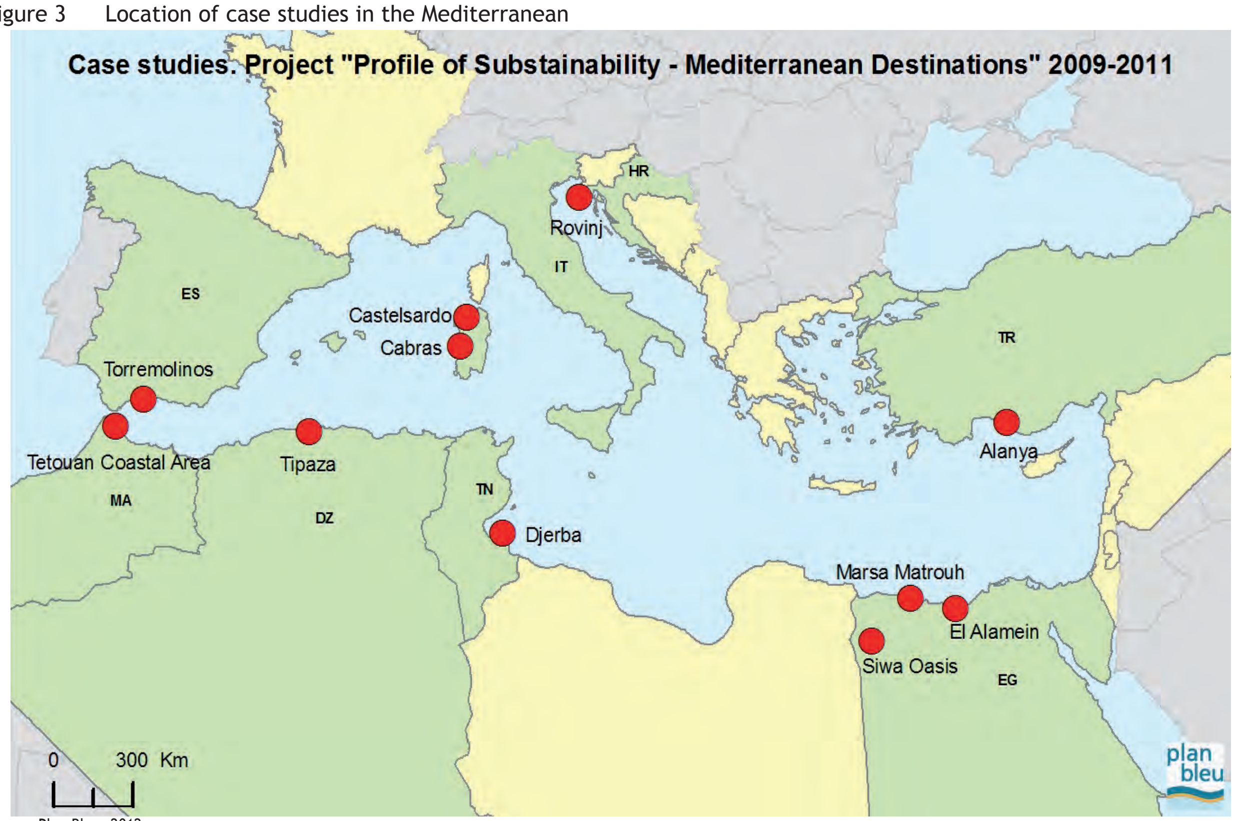
(*) Chefchaouen was initially proposed for study as an alternative destination in Morocco, but was not included in the end, as data was not available.

The choice of the studied destinations does not require leading towards an exhaustive sample of the various types of Mediterranean destinations, nor does it have to focus on specifically representative cases of each country's tourism sector: as an example, Tetouan coastal line does not fit the prevailing model of Moroccan tourism destinations. However, even if the studied destinations cannot strictly be compared (in maturity, size, general characteristics) the elected territories are representatives of the Mediterranean destinations' diversity and the different levels of tourism development in the region.

A short presentation of the destinations (classified by annual nights spent) follows[8]:

8 Basic data about the destinations are available at Plan Bleu Website at http://www.planbleu.org/publications/tourismeUk.html.

Figure 3 Location of case studies in the Mediterranean



Source: Plan Bleu, 2012

Alanya, near Antalya in south Turkey, has become a major resort area in the Eastern Mediterranean, with 147,541 beds. It has developed more recently than Djerba and Torremolinos as in 1980 it had “only” 7,774 beds. Since then its population has tripled and the society has changed from a traditional Anatolian society to a “modern” one (Tosun, 2011). Of the resident population, around 10,000 inhabitants come from various EU countries. The development model is the same as in most coastal parts of Turkey; tourism investment incentives and unplanned growth has resulted in the development of large hotels along the coast of Alanya and resort hotels in the surrounding areas and towns. These facilities host foreign tourists, who represent 91% of the clientele. There is a major difference between this destination and the other case studies in that people from the Former Soviet Union are the main clients of the area (36.7%), followed by Germans (26%). The international airport of Antalya, 130 km away to the west of Alanya, is the main transport link for foreign visitors.

The island of **Djerba** is the largest destination in Tunisia as it plays host to about 18% of the tourism accommodation and visits to the country. Djerba’s development into a significant Mediterranean resort started at the end of the 1950s with the establishment of one of the first Club Med resorts. The dominant type of accommodation is large hotels (more than 500 beds) of high rating (4 and 5 stars), which are built along the coastline in a specially designated tourist area that operates all year round. The main clientele of the island is made up of European tourists, with the French being a prominent group (50%), arriving by air. Djerba is served by an international airport with flights to 122 European airports and by 39 charter companies. Djerba is also connected to the Tunisian mainland by road.

Torremolinos is one of the oldest Mediterranean resort destinations as its development dates back to the 1950s after the first tourist facilities were created during the 1940s. It is part of a larger well-known destination, the Costa del Sol, which operates all year round due to its pleasant climate. The hotels and other professional and private accommodation facilities have developed either along the coast, or in a diffuse manner within and around the town, creating very high population densities. Private accommodation (apartments and houses) has developed very rapidly over the last few decades, overtaking and outstripping the professional accommodation offer. This has transformed Torremolinos in a residential area, with more than 26% of the official residents being foreigners, predominantly British. The largest proportion of foreign tourists is also British (23.7%) in an area that domestic tourists also visit (39.4%). Due to the significant private accommodation and real estate offer, data about tourists is relatively important for tourism as a whole in the area. Torremolinos is very well connected with transport networks as it is located 2 kilometres from the international airport of Malaga. It is linked by the high speed train, and the *Autopista del Mediterráneo* (Highway of the Mediterranean) runs past the town.

Marsa Matrouh, located on the coast, 290 km west of Alexandria, is the capital of Matrouh Governorate. It is also the main tourism area as it contains nearly 60% of all hotel rooms on the northern coast of Egypt. The shoreline of the city, with its succession of bays and beaches, distinguishes the area from other coastal areas on Egypt’s north coast. At the end of 1990s Marsa Matrouh adopted an aggressive tourism policy: new luxury hotels were built out of town and by the coast. The real estate sector is constructing apartments and other secondary housing units, malls and other tourist constructions, as well as the hotels. The main clientele of the destination are domestic tourists, arriving more often by car and train than by air even if the role of the TOs and charter flights is increasing.

Rovinj is an old town on the North Adriatic coast in Istria County (Croatia). It is a destination that was already developed in the Former Yugoslavia (from the 1960s if not earlier), and is very close and well connected by road to a lot of countries and tourist markets in Central Europe: Italy, Austria, Germany (32.4%) but also Slovenia, Czech Republic, etc. 95% of Rovinj’s clients are Europeans and only 2.7% are Croatians. The Italian influence is particularly present, as well as Italian people: 11.4% of the population of the town. The appeal of the destination is based primarily on the very picturesque old town, which is protected and boasts a lot of monuments and well-preserved countryside. Several natural areas are covered by different protection systems as well as the 22 inhabited islets that form part of the Croatian tourism image (sailing in the Adriatic islands). The climate of Rovinj is influenced by its closeness to Central Europe (5^{o}C in January and 22^{o}C in July), This could explain the high seasonality: 90% of night-spent during June-September period. Tourist accommodation (mainly campsites, small hotels, and B&Bs), incorporated in the town, offers a wide range of choice: almost 40,000 beds/places in a town of only 20,000 people.

The **Tetouan coastal area,** on the Mediterranean shoreline of Morocco, belongs to a succession of coastal zones stretching from Tangiers to the town of

Martil via the Spanish territory of Ceuta. The area’s development began in the 1960s with an international focus, supported by a national development plan and the active participation of State companies, starting with the creation of holiday villages in collaboration with international investors. The sea was and remains the main attraction of the area. The tourist development of the area very quickly came to a halt, as the TOs had shown their preference for the Atlantic coast in the south of the country, where climate allows for a longer season (Agadir in particular). A “new development period” began in the 1980s, when Moroccan nationals acquired and/or used some of the tourism accommodation facilities built for international tourists; new buildings were also created in order to fulfil the new domestic demand. International tourists, concentrated in the tourist villages, now account for no more than half of the tourists in official accommodation. Domestic “residential” tourism (apartments, studios, chalets, bungalows, and villas but also installations for social tourism) represents about 94% of the available bed, with hotels remaining as a complementary type of accommodation. The new era of tourist construction (end of 1990s) involved real estate development with foreign, national and local investments. The build-up of the coastline is now confirmed and almost all the shore is now urbanised. A road network serves the area, as the clientele comes more from the Atlantic coast of the country and less form abroad. Tangiers, with its port and international airport, is about 80 km away. Tetouan city has its own small domestic airport.

El Alamein is one of the “youngest” resorts of the destinations studied, as its development has taken place over the last twenty years. In the 1950s the only visitors were the families of solders buried in the Second World War. The cemeteries are still a major attraction outside the tourist village. Marina El Alamein is a “self-contained” tourist complex composed of 7 “villages” built along a beach of 15 km near the town of El Alamein. This gated community is accessible only to its clientele, who are made up of the Egyptian elite (Rady, 2011). El Alamein airport is very new and receives only domestic flights. The rare international tourists fly through Alexandria or Cairo. The destination is also connected to Alexandria and Cairo by road and rail (about 110 and 300 km respectively).

The **Tipaza coastal area** is one of the pilot zones for sustainable tourism in Algeria, especially for the conservation and development of coastal areas and their components (Grimes, 2011). It is part of the Wilaya of Tipaza situated in the North-Centre Region of the country, only 70 km from the capital Algiers. Its location near the capital of Algeria generates housing pressure, mainly on the coastal area; one third of the coastline is already urbanised. Camping places (6,700 places) are significantly more numerous than hotels beds (2,688) and the destination attracts almost only domestic tourists. The area around Tipaza has great tourist potential, with 16 zones of tourist expansion in the coastal area, covering 1,510 hectares spread over of 104 km of coastline. Road and train networks connect the area with Algiers and the other coastal towns that concentrate the majority of Algerian population.

Siwa Oasis is the only non-coastal destination studied in the project. It still has a traditional character and its attractions are mainly cultural (ancient monuments, traditional architecture) and related to its distinctive landscape (palms and acacia groves, large lakes, water springs, and sand dunes). A few small and low class accommodation facilities in the town were hosting tourists until recently, when some new, bigger and more modern hotels and new eco-lodges were constructed in the surrounding locations. Siwa Oasis is connected by road to Marsa Matrouh in the North (310 km) and to Cairo in the East (550 km).

Castelsardo is a small picturesque village in West Sardinia, known more for its historic architecture, handcrafts, wine and gastronomic tradition, and its natural parks than for its coastal character, despite having a fully equipped marina with 800 berths. Its accommodation offer, comprising small hotels and B&Bs (2,113 in total for 5,795 inhabitants) is in keeping with the traditional local architecture. Italians (69%) and Germans (8%) are the main clients and represent the largest proportion of visitors. Sardinia’s various ports and airports offer a lot of domestic and international connections; charter and low cost companies also serve the island.

Cabras is a destination whose development has been based on its environmental and cultural assets. The development of nature tourism can be explained by the Marine Protected Area (MPA) combined with Sites of Community Interest and Special Protection Zones, sandy beaches, small islands, etc. A new “governance” approach has been launched by the Municipality of Cabras, with a specific project of the Ministry of the Environment called “Management Programmes” which was created for the MPA. The strategy consists of instigating a participative development process to define a overall tourist product, based on the interaction between institutional, socio-economic and producer groups and the tourist sector, in order to create an exemplary system of interconnections within the provincial, regional and Mediterranean contexts (Satta, 2011). Cabras has a small number of tourism beds (1,174) mainly in secondary accommodation. Tourists numbers have begun to rise since 1996 and now more than 20,000 overnight stays per year are recorded. Visitors are mainly domestic tourists (around 75%), 48% of which come from the rest of Sardinia. Their average stay is 3.45 days, while foreigners (mainly Germans and French) stay for only 2.14 days on average; that means that Cabras represents a stage of a tour for (domestic and foreign) tourists. Seasonality is very high for Italian tourists, but the distribution is better for foreign tourists, who prefer to come during September than in August. Cabras is located in the central-west part of Sardinia and about 100 km from the international airports of Cagliagri and Alghero.

Dynamism of the destinations[9]

Supply-side analysis gives an initial overview of each destination, as well as its opportunities and limitations. Analysis of the demand gives an appreciation of the "acceptance" of the tourism product offered by the destination in the global market. The dynamism of each destination reflects the changes in selected supply and demand parameters and the current situation of the tourism activity.

Supply: accommodation offer, social and environmental pressures, seasonality

Changes in the accommodation offer

Changes in the number beds and accommodation quality (category, type of accommodation, share of private houses) and the construction pattern is important for the quality of the tourism product but also in order to characterise the different destinations. This provides information about life cycle of the tourist destinations.

Pressure is very clearly increasing on the coastal zones of the Mediterranean. This is more evident when tourism development is planned outside the town and other activities (both in "old" destinations such as Djerba and the Tetouan coastal area and in "new" destinations like Marina El Alamein) than when there is a mixed use, as in Alanya, Marsa Matrouh or Tipaza. Planning schemes do not seem to protect the fragile coastal zones, which are in high demand for different uses, mainly for real estate projects.

In "old" (mature) destinations such as Djerba, Rovinj and Torremolinos, the accommodation offer is no longer expanding. In Torremolinos this is because of the lack of free space for building, for the other destinations it seems to be a planned decision.

With regard to the quality of accommodation, 90% of hotel beds in El Alamein are in 4 and 5 star hotels, 71% in Alanya, 63% in Torremolinos, 48% in Djerba, and 40% in Marsa Matrouh; Tipaza, Cabras and Siwa Oasis have no high-end hotels.

Changes in the accommodation offer - Destinations classified by annual nights spent

Alanya: rapid growth in all types of tourist accommodation during the period 1980-2008, but lower quality due to the increase in "municipality-licensed" establishments. Huge constructions, mainly on the coastline, in and out of town.

Djerba: increase in the number of beds in large (>500 beds) upscale hotels (33%) in a defined zone outside the populated area. With 45,000 beds covering 3.3% of the surface of the island, the tourist zone decreed in 1973 is considered as saturated.

Torremolinos: slow and fluctuating increase in hotel accommodation over the last decades, with large 4 & 5 star hotels becoming the majority (decline in family-run and small enterprises). There is a fast growing residential area, with beds in private accommodation (64,000) having overtaken professional accommodation (28,250 beds).

Marsa Matrouh: increase in the number of beds in upscale hotels outside the populated areas.

Rovinj: beds in B&Bs and places on campsites are more numerous than hotel beds (very few big establishments). There has been no significant change in the accommodation structure as a result of the war between 1991 and 1995.

Tetouan coastal area: rapid growth in private residences, slow progress in the development of tourism accommodation along the coast.

El Alamein: big resorts disconnected from the town.

Tipaza: small number of classified hotel beds compared to the seasonal accommodation and campsite offer.

Siwa Oasis: slow growth in the number of beds; efforts are being made to built higher-quality environmentally-friendly accommodation.

Castelsardo: number of hotel beds is increasing within the town. Low quality (based on stars classification) but "traditional" accommodation dominates.

Cabras: small number of beds, with hotels underrepresented.

Characteristics of the destinations: offer, product

It is well-known that the principal tourism product of the Mediterranean, as a regional destination, is 3S tourism. Some of the destinations are developing "away" from

9 Most of the data collected is included in Appendices. More analytical information on each destination is included in the experts' reports available from the Plan Bleu Website: http://www.planbleu.org/publications/tourismeUk.html.

and "independently" from existing towns or smaller settlements; some others are connected to the towns and are clearly influencing them. In a few destinations, tourism is integrated with existing settlements without detracting from the pre-existing built-up area. The inevitable result in these destinations is urban sprawl.

We can classify the destinations as follows:

1. **3S resorts - international (global) product**: Alanya, Djerba, and Torremolinos;
2. **3S resorts - towns with a mainly domestic character**: El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas;
3. **A distinctive tourism product with local character**, without significant expansion of the built-up area: Castelsardo, Rovinj, and especially Siwa Oasis and Cabras.

The development of secondary accommodation (such as B&Bs, pensions, villas) as well as residential homes (houses owned by non-permanent residents of the area, nationals and foreigners) – for which there is no reliable information for all the destinations – significantly influences the "traditional" analysis usually based on hotels and similar accommodation. Official data is generally available and more reliable for hotels and similar establishments.

With regard to the issue of "**Hotel *versus* real estate and residential accommodation**", although there is no precise information about the development of private housing and the activity of real estate companies, which increases the unofficial supply of accommodation, the "classic hotel" is on the decline compared with the growth in residential tourism and other real estate projects: holiday homes and alternative accommodation such as B&Bs, private home rentals, apartments, villas, etc. Local authorities and/or other local institutional bodies are giving in to the lure of real estate developers (creation of jobs in the building industry, tax resources) while municipality expenses are increasing and are out of sync with supplementary urban taxes due to residential excess:

- In Morocco, there is a gradual shift away from standard tourism development projects (hotels, resorts) towards residential real estate projects, which often include an "alibi hotel" in the middle of the residential project (Berriane, 2011). In tourism projects that manage to strike a balance between hotels and residential, the hotels are often simply not built, and may even be replaced by other types of buildings (such as supermarkets).
- In Croatia, a country that is set to become the 28th member of the EU in 2013, new construction legislation has been adopted. The law makes very little distinction between second homes and primary residence and allows for tourism accommodation capacities to be converted into second homes. The construction of second homes is becoming a serious problem, which is sending coastal urban sprawl into overdrive, with urban areas expanding and now encroaching on natural areas, farming land and forests (Klaric, 2011).

Leaving the market to its own devices means generally unchecked construction. Faced with uncontrolled growth in residential construction, there is a need to condense those destinations that are already in the throes of urbanisation, before opening up new areas to tourism. This would help to concentrate environmental impacts on confined territories and preserve the increasingly rare natural areas.

However, rather than incriminating new forms of accommodation, it seems important to reconsider them as an answer to emerging demands, often for domestic, family-based and popular tourism, corresponding to the aspirations of new types of customers. Ways of integrating these new and often informal offers inside established circuits need to be found, and thus to find taxation schemes that are as fair as possible.

Environmental and social pressures from tourism

In this section, we discuss the pressure exerted by tourism on the local society and environment. The number of beds but also the delimitation (size) of the destination can influence this pressure. In some cases the destination is disconnected from the town and it is very well delimited; in other cases delimitation is rather difficult, since tourism activity is either spread throughout the whole town or is concentrated in a delimited part of it. The pressure also depends on the number of second homes, which are increasing in number everywhere, even if quantitative information is not available in all the destinations to support this statement.

Alanya, with a higher concentration of beds than any other destination in this study, has a very high index of social pressure (beds per head of population: *Figure 4*) but a rather low environmental pressure index (bed per surface area: *Figure 5*) when the total area is examined, since the whole administrative area is rather big (1,756 km^2). However, because the tourist area in which tourism activity is concentrated along the sea shore is calculated[10] to be only 55.6 km^2 the "real" environmental pressure has to be multiplied by 31.5 times to account for concentration in the coastal strip.

10 Using Google Earth.

Table 2 Environmental and social pressures - Tourism accommodation and pressure indices (Destinations classified by type and alphabetic order)

Category of the destination	Mass-3S International			3S National				Distinctive tourism product and local character			
Case study	Alanya	Djerba	Torre-molinos	El Ala-mein	Marsa Matrouh	The Tetouan coastal area	Tipaza	Cabras	Castel Sardo	Rovinj	Siwa Oasis
Beds + campsite places / pop. of tourist area	1.60	0.54	0.46	5.33	0.30	0.05	0.04	0.20	0.35	2.75	0.31
Beds + campsite places* / surface of the administrative area	84.04	122.89	1,389.73	123.66	96.94	25.47	25.03	11.13	44.35	328.08	18.98
Beds + campsite places* / tourist surface area	4,822.58	3,850.72	3,415.71	138.67	130.00	1,035.20	391.93	11.13	44.35	328.08	22.86
Beds + campsite places	147,571	45,631	28,752	2,400	6,000	7,029	8,930	1,761	2,017	39,167	1,000

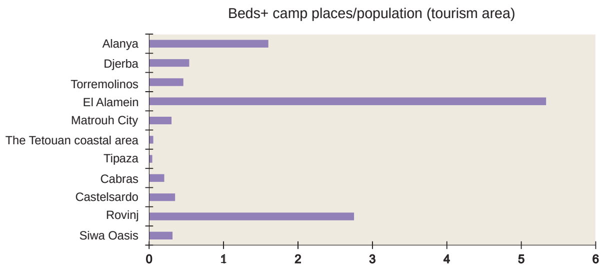
Source: Data from the experts, author's calculations. * With regard to environmental pressure, the assumption is that one camping place represents only 20% of the pressure of a hotel bed.

In Djerba, the administrative surface area of the two municipalities affected by tourism (Houmt Souk and Midoun) is 371.31 km^2, the size of the "tourist zone" referred to by Jean Mohamed Mehdi Chapoutot is about 100 km^2, and finally the coastal zone where the hotels are actually located is only 12.6 km^2. In Figure 4 we have used the surface area of both the administrative and tourist area for calculating the environmental pressure. In the first case, the calculated pressure value is rather low, but when we use the latter one (where most of the tourists are), then environmental pressure is 30-times higher.

In Torremolinos, where the town and tourism area practically overlap in an extremely limited space (only 8.3 km^2), environmental pressure is extremely high. The same is true for social pressure, especially if beds in second homes (estimated at 64,160) are taken into account as well as tourism beds (28,250).

Destinations with a small population and an integrated pattern of development (e.g. Castelsardo, Siwa Oasis) have a rather high score for social pressure, even if the number of nights spent by tourists is very low compared to "big" destinations. In destinations that are disconnected from the town, there is low social pressure but the situation is equivalent to employees working in a "big factory" next to the town; this is the case for El Alamein where a "huge" tourism area of 2,000 tourism beds (social index 5.33) and 12,600 beds in second homes are located near a small village of 1,841 inhabitants.

Figure 4 Social pressure indicators - "beds per head of population"



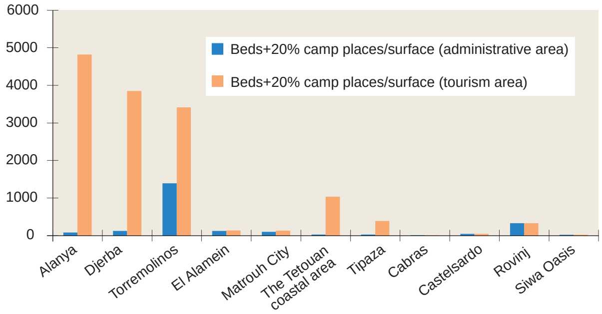
Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Excluding the extreme case of El Alamein, in Figure 4, Rovinj and Alanya are destinations with high average social pressure: more than one tourist bed per inhabitant.

In Figure 5 we can observe that the environmental pressure in the given destination can vary significantly depending on which area is taken into account: administrative or tourism area. By the first measure, Torremolinos is the only destination with a very high score followed by Rovinj; by the second measure, Alanya, Djerba and Torremolinos, the three largest destinations in the project, seem to have the highest environmental pressure with more than 3,000 beds per km^2; the Tetouan coastal area also has more than 1,000 beds per km^2.

Second homes also generate social and environmental pressure. Even though these houses are used by their owners for a shorter period (30 to 60 days per year,

Figure 5 Environmental pressure indicators - "beds per surface area"



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

mainly during the high season, if they are not rented for a longer periods or occupied by retired people) and their users have a different pattern of behaviour (i.e. lower expenditure per day, lower mobility within the destination), their results still have to been taken into account as they modify the land use, consume resources, produce waste, contribute to the traffic burden, etc. El Alamein, Marsa Matrouh, the Tetouan coastal area and Torremolinos, have a larger number of beds in second homes than hotel beds.

Furthermore, not all types of accommodation put the same pressure on the environment; the presence of 17,000 campsite places in Rovinj (43.5% of the total accommodation offer) consumes less land and resources (space, water, etc.) than the equivalent number of beds in hotels[11].

Operational period and seasonality[12]

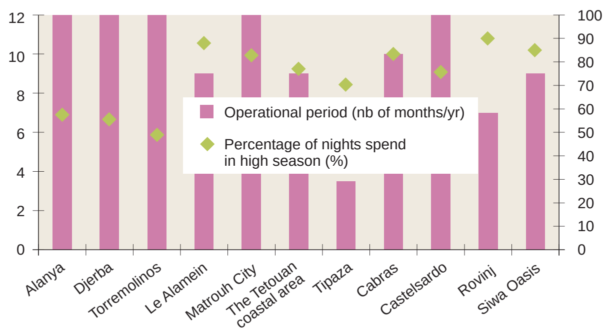
The climate, type of product (3S or "extended" 3S[13]), and the way the tourism market is organised are very significant factors that influence the length of the tourism period. Diversifying a destination's "product" is a common strategy in order to make the season as long as possible. Alanya, Djerba and Torremolinos have a year-round high season with international tourists that book through TOs. TOs have also launched several strategies for product differentiation by adding new activities and attractions. For Torremolinos, this strategy to extend the season seems to have been ineffective despite the high cost incurred, as evidenced by the increasing number of hotel beds that are closed during January; nevertheless the operational period of Torremolinos is 12 months, there are efforts to attract domestic tourists in order to buck the seasonality trend.

Generally speaking, the high level of TO involvement in the international 3S destinations seems to imply a longer operational period and a lower seasonality than in others (*Figure 6*).

When a destination is geographically closer to the tourists who can travel by their own means, as is the case for Rovinj especially, the operational period can be long, but the season will not necessarily be well balanced. For Rovinj, Siwa Oasis and the Sardinian destinations, the differentiation of the product and the lower level of TO involvement might explain the short operational period.

"Domestic destinations" (Cabras, Castelsardo, El Alamein, Marsa Matrouh, the Tetouan coastal area and Tipaza) generally have a shorter operational period and higher seasonality but also higher unofficial visitor numbers, using second homes and undeclared accommodation.

Figure 6 Operational period and seasonality



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Changes in the demand: client nationalities, length of stay, occupancy rate

The dependence of a destination on TOs and/or on a limited number of nationalities can put it in a precarious position. However, although destinations used to be categorised as international or domestic based on the percentage of arrivals in professional accommodation, the rapid growth in numbers of private houses has created a new category: residential

11 Based on existing benchmarks and experts meeting, we have considered that one campsite exerts 20% of the pressure of a hotel bed in terms of space, water and energy consumption.

12 Operational period is the period when tourism companies are open to receive tourists; there is obviously a correlation between the operational period of a destination and seasonality.

13 "Extended 3S" products are taken to be holidays where the tourists' principal motivation is the same as for 3S (relaxation and fun), but the tourists participate in some organised visits or other activities within the area. In destinations where TOs dominate, these activities are very often proposed by the tour-leaders to their clients.

destinations. In these cases, where professional tourist accommodation is under pressure from falling demand, information is very limited and deals only with the number of beds of private housing and secondary homes.

Characteristics of the destinations: clientele, average stay, TOs' importance

Using the nationality of tourists as a criterion for the classification of destinations, we can distinguish two main groups: international destinations where at least the majority of tourists are coming from abroad, and domestic destinations where the majority of tourists come from country of the destination.

The 11 destinations are classified as follows:

- **International destinations**: Alanya, Djerba, Rovinj, Siwa Oasis and Torremolinos have more foreign tourists than local ones (*Figure 7*). In Djerba, French tourists are by far the leading nationality, accounting for 50% of nights spent, and along with German and Italians, making up more than 80% of the clientele (*Figure 8*). European tourists are also the main clients in Rovinj: Germans (32%), Italians (14%) and Austrians (12%). In Alanya, tourists from the Former Soviet Union represent 36.7% and Germans 27%, while no other nationality has a share higher than 7.5%. In Torremolinos, the Spanish now represent the largest share of the clientele (39.4%), with the British and Germans accounting for a further 33.8%. Finally, Italians dominate the destination of Siwa Oasis with 41.6% of the total nights spent.
- **Domestic destinations**: in El Alamein, Marsa Matrouh and the Tetouan coastal area, domestic tourists represent the most important part even the majority of the clientele, but there is a significant presence of foreigners (*Figure 7*). Nationals dominate in Castelsardo (67.1% Italians, 7.9% Germans) and Cabras (75% Italians). Foreign tourists are almost non-existent in Tipaza.

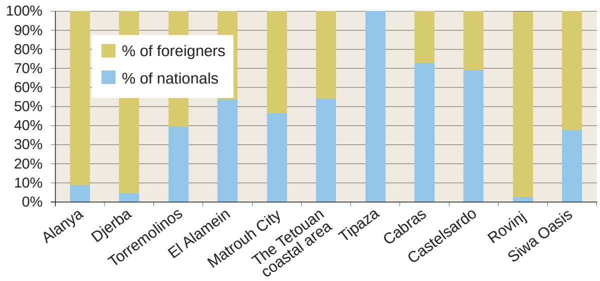
The degree of dependence of a destination can be assessed if the information on Figure 7 and Figure 8 is analysed together. Djerba is the most extreme case as it depends on foreign tourists (more than 90%) and 50% on only one nationality! All the international destinations have a high percentage of dependence on the five leading nationalities (*Figure 8*).

The average length of stay is generally higher for international tourists as they travel a longer distance than nationals (Djerba: 7 nights for foreigners - 2.4 nights for nationals; Alanya: 6.9 - 1.9) (*Figure 9*). When the level of TO involvement is high, the average length of stay in a resort is generally high, since the TOs try to "fix" visitors as long as possible in one place (destination/accommodation), in order to minimise costs and because they organise day trips in the surrounding area.

Sometimes the difference in length of stay between domestic and foreign tourists is not significant (Torremolinos: 4.9[14] nights for foreigners - 3.4 nights for nationals). In some cases the nationals stay longer (Castelsardo: 4 - 6.3; Cabras: 2.12 - 3.4); this is observed when international tourists travel independently and do not choose to stay in the same destination for their whole holiday, preferring instead to visit a larger area (e.g. Sardinia). When tourists move around within a wider destination during their trip (i.e. Sardinia, Costa del Sol), the average stay in a hotel is shorter.

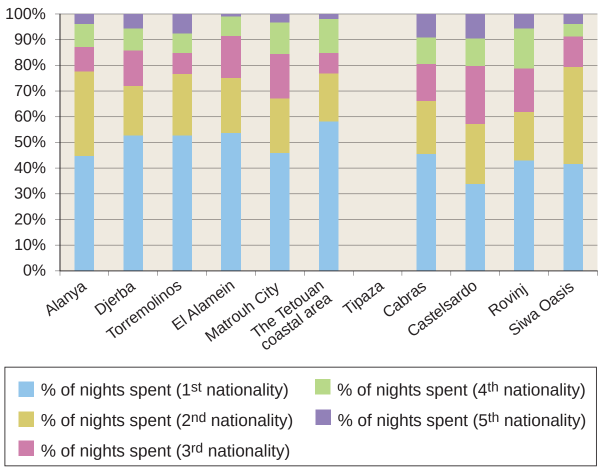
14 5.8 in 2004 and between 10.8 to 9.6 for apartments.

Figure 7 "Internationalisation" of the destinations



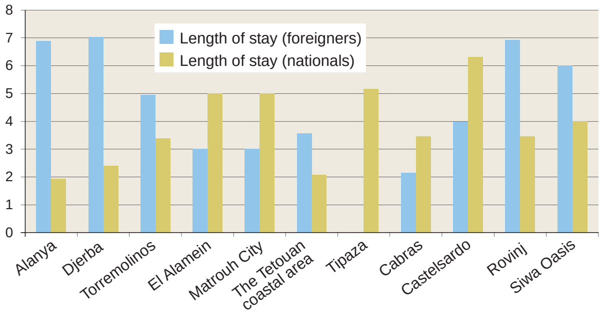
Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Figure 8 Nights spent by the five leading foreign nationalities (%)



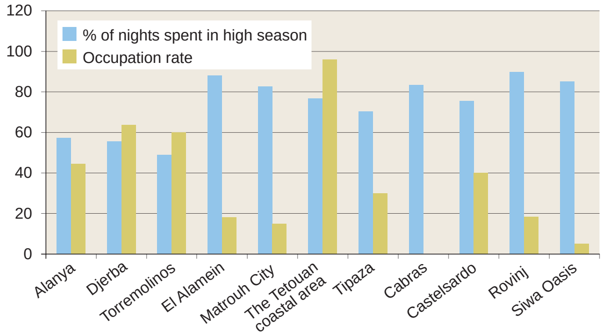
Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Figure 9 Average length of stay of domestic and foreign tourists (in number of nights)



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Figure 10 Seasonality (%) and occupation rate



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Occupancy rate and seasonality

Changes in seasonality and occupancy rate are very significant as they indicate changes in the attractiveness of a destination and also changes in economic results for local companies.

Seasonality is low in areas where TOs are present, as in Djerba (55.5% nights spent during the period June-September), Alanya and Torremolinos. TOs have a significant presence in three studied destinations: Alanya where they handle 88.3% of the foreign tourists, Djerba (77.9%) and Torremolinos (69.4%). In contrast, seasonality is very high in Rovinj (89.9%), Cabras (83.5%), Castelsardo (75.4%), and all the Egyptian destinations (over 80%); in Siwa Oasis the high season is during winter.

Torremolinos has seen a decrease both in the total number of nights spent (down 5% between 1999 and 2007) and the occupancy rate (down from 82.2 in 1999 to 70.7 in 2007, and it is estimated to be 10 points lower for 2008 and 2009), as the supply of new beds did not stop increasing (Navarro Jurado, 2011). The occupancy rate is 63.7% in Djerba but only 44.4% in Alanya. It is estimated to be 40% in Castelsardo (where the operational period is all year round) and only 18.5% in Rovinj (with a 7-months operational period per year).

Diversification of the tourism product: quality, attractions, infrastructure

Diversifying the product is a well-known strategy for facing competition in all economic sectors. In the tourism industry, the multiplication of 3S destinations all over the world over the last 50 years, offering almost the same product, has led to very tough competition between them. The concentration of the market in the hands of a small number of big TOs has worsened the situation.

Different strategies are in place in the destinations studied, either to maintain the existing market share or to gain market share as a destination is expanding: upgrading the quality of basic tourist services such as accommodation, restaurants, creating new infrastructure, and drawing on local natural and cultural resources.

With regard to the services, attractions and activities presented in the experts' reports, we can observe in a schematic way that:

- “International” resorts such as Alanya, Djerba and Torremolinos:
  - Have “added” a lot of infrastructure features that are rather big and not much in keeping with local features: golf courses, casinos, spas, and theme parks are the most common examples that can be found in every destination world-wide;
  - Have few distinctive attractions besides the beaches that are now totally “artificialized”. Beaches are more used for photos, as tourists use pools for swimming; the number of swimming pools in these areas defies belief, as it can be observed from satellite images;
  - Have not made best use of their own attractions. Most of these attractions are not significant and are used by 3S tourists as a way of passing the time during their stay in the destination; it is unlikely that a tourist with special interests would choose to visit such a destination for these attractions.
- “Domestic” resorts such as El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas:
  - Have not constructed a lot of specific infrastructure;
  - Have some distinctive attractions (cultural and environmental assets) that are not significantly exploited.

- "Destinations with character" such as Cabras, Castelsardo, Rovinj and Siwa Oasis:
  - Have significantly fewer tourism infrastructures;
  - Have a considerable number of distinctive attractions that are not extensively used (except Rovinj which is a special case: it is an old town-resort and a mature destination, having some common features with the international 3S destinations).

System analysis and initial conclusions

Tourism is a changing activity, as are all other business sectors within a global economic system. The global market seems to be powerful enough to drive these changes, by influencing demand, supply and the way the market is organised. But how can the differences between destinations presented above be explained? We will try to present an initial assessment of the sustainability of the different destinations based on the information about tourism supply and demand. In order to explain the divergences, it is necessary to consider the different components and the various market players within the tourism system: both external and internal stakeholders.

Changing role of external stakeholders: international level

Consumers: the tourists. Tourists can be divided in various sub-groups with no "homogenous" motivations in taking their holidays. A lot of differences exist even within the groups; income, experiences (especially in tourism), level of education, environmental awareness, everyday lifestyle are some causes behind the different motivations that explain why tourists are looking for different products. However, passive relaxation under the sun remains the most popular product, even if "active" tourism and/or eco-tourism are gaining a greater market share. Only four of the destinations studied seem to have "different" profile (Cabras, Castelsardo, Rovinj, Siwa), but with a rather small number of visitors – the exception being Rovinj, which combines the characteristics of a resort destination with strong natural and cultural features.

Investors. An important change has occurred during the last 25-30 years: speculators have taken the place of investors. Within the tourism sector, this change is manifested in the invasion of domestic and international real estate capital investors that are concerned with short term profits, in the place of hoteliers who used to have a long-term vision. This is a significant reason for loss of sustainability. This fact also "converts" tourism into a "grey" residential activity. Second/holiday homes are not something new: the new element is the mass construction of homes within or near tourism establishments with funding from bank loans and other governmental support. Another new aspect is that the "new" property owners are behaving as "speculators", using the real estate companies to rent their "new" proprieties in the quest for high returns. This trend is evident in the 3S destinations, where investment is high. The situation is totally different in the "alternative" destinations where investment levels are much lower.

Tour Operators (TOs) have undoubtedly influenced the world tourism map as well as the pattern of local development within destinations over the last 60 years. They have brought destinations to the world's attention (Club Med in Djerba and the Tetouan coastal area), they have sometimes "pushed" them to develop in an uncontrollable way (Alanya, Djerba, Torremolinos), and they have also abandoned some destinations (the Tetouan coastal area) when their goals were not compatible with local policies and/or characteristics. TOs have also shaped destinations by their direct or indirect interventions: big buildings along the shore with or without private beaches, swimming pools in all categories of accommodation as a prerequisite for attracting clients (even if the accommodation is near a superb beach), architecture and landscaping designed with scant regard for the natural and climate characteristics of the destination, new infrastructure projects built at high economic and environmental cost to "rejuvenate" destinations (e.g. golf courses, congress centres, artificial lakes, theme parks, beach "reproduction"). "Destinations with character" are not depending on tour operators, even if they are present in Siwa Oasis.

Low Cost Airlines are more recent stakeholders that have significantly influenced the pattern of tourism and residential destinations, as they have "replaced" TOs in one of their main role: low cost travel with a better geographical distribution of departures through the use of peripheral airports.

Competitors (new destinations). Whereas until 30 years ago, the Northern Mediterranean was seen as the "edge" of the civilised world where any cautious European tourist could travel, this is no longer true. For many years now, the whole Mediterranean has become accessible and safe, but many other areas all around the world such as Central and South America, Indian Ocean and Pacific Ocean countries are also inviting tourists from the most developed countries to visit them. The product on offer is either relaxation (proposing a cheaper and more exotic “version” of the 3S product than in the “old” Mediterranean destinations) or the exploration of different civilisations and natural environments. The main conclusion is that supply is increasing from countries that can offer an equivalent “international” but also “distinctive” product at competitive (and sometimes very low) prices.

International organisations and international NGOs are active in directly or indirectly protecting cultures, monuments, species and ecosystems, through local bodies. UNESCO is by far the organisation that has most influenced the conservation awareness of local communities, even in less developed countries.

Various roles of internal stakeholders: national and local levels

National bodies (government, planning authorities): their role was crucial mainly in countries with a centralised political system, as in most of SEMCs. Their economic, social, and environmental priorities, expressed in concrete actions (development incentives, environmental policies, tourism plans such as the “*Schéma Directeur d’Aménagement Touristique*” and the “*Zones d’Expansion Touristique*” in Algeria, the “*Plan d’Aménagement Touristique*” for Djerba, the “*Plan de Développement*” and the “*Zones d’Aménagement Prioritaires*” in Morocco) or omissions have determined the context for tourism development. The fact that many of the Mediterranean countries (particularly those destinations that are in peripheral regions away from the main national development poles) have lagged behind European countries in development, has led to the implementation of policies with short-term economic results: currency inflow, employment, economic activity, regional development. There still appears not to be any long-term analysis or efficiency evaluation of the policies. Planning is somewhat effective in certain destinations such as the Sardinian ones and Rovinj.

Local authorities can play an important role in particular in European countries, where there is significant decentralisation, either in promoting development and management policies to improve the tourism product or in promoting the destination. In Torremolinos, the municipality implemented various actions to reverse the decline of the destination (i.e. diversifying the tourism product, regeneration of beaches) without stopping the expansion of the offer. In Cabras, the local authorities have worked with private stakeholders and civil society to instigate a specific development plan based on local assets: creation of a MPA.

National and local entrepreneurs either participate in tourism development by investing in new activities (accommodation, restaurants, bars, agencies) or try to leverage the new demand created by tourism for greater profitability. The self-organisation of the local community in Cabras is a rare example – among destinations studied – of common active “reaction” to growing tourism demand.

Local communities and specially women but also young people have found local job opportunities in tourism – although social inequalities remain a problem in almost all the destinations studied.

Local NGOs (environmental or otherwise) do not seem particularly active and/or involved in the destinations studied.

Initial conclusions

Even if it is difficult to generate a totally homogeneous typology, **we can classify the destinations studied into three main categories**:

- **3S resorts - international (global) product**: Alanya, Djerba, and Torremolinos. These destinations are generally mature resorts with “industrial-scale” organisation: large upscale hotels, tourism infrastructure and activities, clear division of labour for the personnel, management and marketing functions. For this category of destination, foreign stakeholders have an important role: investors, TOs, and tourists. All three destinations are facing issues of saturation even decline and are looking to diversify/rejuvenate the product.
- **3S resorts/towns with a domestic character**: El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas. These destinations are tending to develop with a mixed organisation of businesses (hotels and other accommodation), low levels of tourism infrastructure and differentiated activities. Domestic investors and tourists play an important role.
- **Distinctive tourism products with local character**, that have not seen major expansion of the built area: Castelsardo, Rovinj, and especially Cabras and Siwa Oasis. These destinations are developing with an “artisanal” organisation of businesses (small family enterprises where there is no clear division of labour), low levels of tourism infrastructure and differentiated activities. Local players have an important role in investments. These destinations are integrated in a small settlement and their appeal is based on their

distinctive cultural and natural characteristics. Rovinj, as a “mature” destination, is different in that it has a small number of very large hotels.

The effects on the sustainability of the destinations differ as the latter have different characteristics, different development paths and different levels of maturity in the life cycle analysis. After this first analysis of tourism as driving force in the destinations studied, what issues can be considered to impact negatively on sustainability?

- An increase in the supply of tourism accommodation, without taking into account global changes in supply and demand; changes in operational period, seasonality and occupation rate have repercussions on prices and on the economic sustainability of tourist establishments.
- The uncontrolled development of tourist installations with no supervision of size, shape and location permanently marks a destination; this could be seen as a plus for a destination if these constructions are considered as introducing “a new architectural style”, but this is rarely the case.
- The mass development of residential accommodation by real estate companies undermines the tourism economy (it is a direct competitor) and the national economy : development of “grey” economy, low and unskilled employment. The development of second homes also increase environmental pressures as land use changes accelerate, even in fragile and valuable ecosystems. The area required by a home-owning resident is much larger than the area required by a tourist, as a tourist bed occupies generally less space and has a bigger occupation rate than a “residential” one.
- The “internationalization-standardisation” of a tourism product can be positive for a new product (when a new destination is trying to get established in the international market) in order to gain market share. This strategy subsequently turns sour for the same destination when it becomes “mature” and needs to diversify its product from those offered by competitors. The idea in the Butler model, suggesting the “rejuvenation” of a destination in order to stay competitive and avoid decline seems to be difficult to apply, since the reputation and features created by the previous development pattern are hard to change and require high levels of investment.
- Damage to the various environmental components such as beaches, aquifers, natural areas, biodiversity, landscape, quality of built environment can have economic costs and create cumulative environmental problems. Dealing with these issues requires huge investments and has an uncertain outcome.

Tourism results and impacts in the destinations

In order to achieve the main goal of the project, which was to assess the sustainability of tourism, a two-step process was used: (i) the first step was to record and assess the economic, social and environmental outputs of tourism; (ii) the second step was to assess how these outputs influence the destination's sustainability. Tourism in different destinations can be compared through performance indicators and indexes. This comparative analysis is complemented by a system analysis, in order to explore how the various players influence the sustainability of tourism activities and destinations.

Comparative analysis of the destinations

This analysis is based on the information from the experts' reports and reflects not only the issues of data quality and availability within the different national systems, but also problems of comparability. In many cases, information refers only to hotels, in some others the whole HORECA sector (Hotel, Restaurant, Café) and in other cases experts have incorporated more general input based on information that was available. The lack of quantitative information was replaced by the expert's qualitative assessment.

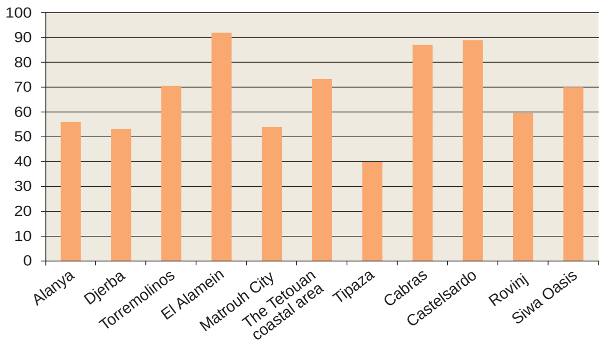
Results and impacts of tourism on the economy

The economic results and impacts relate to: (i) the direct economic effects of tourism, driven by tourists' expenditure in the destination (purchase of services and goods); (ii) the impact of overall tourism activities (direct and indirect demand) on the local economy.

The direct economic effects of tourism in an area depend on the number of nights spent, the number of tourists, their average length of stay and on their daily expenditure. Alanya, with 15.3 million nights spent, Djerba with 8.3 million, Torremolinos with 4.9 million, and Rovinj with 2.6 million are the destinations with by far the highest total revenue from tourism. With regard to expenditure per day, the destination with the highest level appears to be El Alamein (€92), primarily because it is frequented chiefly by the Egyptian elite. Castelsardo (€89) and Cabras (€83), the two Sardinian destinations that have a distinctive character and product, also have high levels of daily revenue. The common characteristics of these destinations are that they have very low proportion of tourists arriving via a TO, and their clients are mainly nationals. The Tetouan coastal area, which also has a fairly high level of expenditure (€73) seems, like El Alamein, to be a destination for the national elite. Djerba and Alanya are the two biggest destinations, but are heavily dependent on TOs and have low figures for average daily expenditure (€53 and €56 respectively). The only destination with a lower level is Tipaza, a destination visited only by domestic tourists who spend less money than international ones.

There are significant differences in daily expenditure between different destinations (from €40 to €92 - *Table 3, Figure 11*) and even within the same destination, depending on the nationality of the tourists and their revenue, or on the way the holiday is organised. European tourists spend more than nationals in destinations such as Djerba, due to differences in income levels between nationals and foreigners. Conversely, domestic tourists spend more in Alanya, where the TOs play a major role, and in El Alamein & Marsa Matrouh where the Egyptian elite spend more than foreign tourists who travel with TOs. The type of accommodation used by tourists may explain the difference in spend: in Rovinj, foreigners spend €100 in hotels, but only €55.90 in B&Bs and €43.60 at campsites, giving an average of €59.60.

Figure 11 Daily tourism expenditure per capita. Euros/ per capita/per day



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Table 3 Economic data from the destinations

	Tourism expenditure per capita (Euros)	Total tourism expenditure (Euros)	Number of annual nights spent	Number of beds	Annual nights spent per bed	Tourism expenditure on accommodation (Euros)	Annual income per tourist bed (Euros)
Alanya	56	876,164,707	15,286,250	147,571	103.6	8.10	5,937
Djerba	53.10	449,000,000	8,307,065	45,311	183.3	17.28	9,909
Torremolinos	70.60	294,000,000	4,916,305	17,102	287.5	38.46	17,191
El Alamein	92	28,284,227	306,438	2,000	153.2	60	14,142
Marsa Matrouh	54	33,095,358	612,827	5,000	122.6	32.4	6,619
The Tetouan coastal area	73.30	22,550,525	307,647	3,205	96.0	40.90	7,036
Tipaza	40	9,144,960	228,624	4,688	48.8	20	1,951
Cabras	87.10	2,057,414	23,624	976	24.2	42	2,108
Castelsardo	89	9,395,730	105,570	2,113	50.0	43	4,447
Rovinj (Istria)	59.60	153,589,200	2,602,580	22,114	117.7	23	6,945
Siwa Oasis	70	6,281,979	102,146	750	136.2	42	8,376

Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

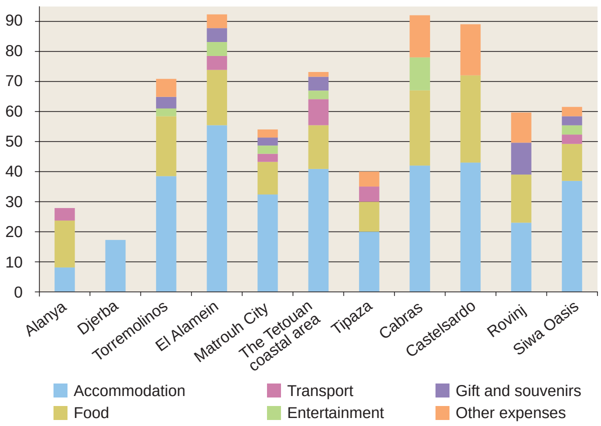
Two of the key indicators of economic efficiency in the destination are:

- The "**annual nights spent per bed**" indicator gives an idea of the occupancy rate over the whole year, independent of the opening period of the different establishments: 287.5 and 183.3 nights spent per bed. Two out of the three mass tourist destinations, Torremolinos and Djerba, have the highest scores. The fact that the third mass tourist destination, Alanya, has a lower score (103.6) can be attributed to the low level of maturity of this destination. The Egyptian destinations and Rovinj have a higher occupancy rate than Alanya (around four months), the Tetouan coastal area (around three months), while Castelsardo, Tipaza and Cabras have less than two months.
- The "**annual income per tourist bed**" indicator gives an indication of the average revenue per bed over the year in the destination, but this metric is also influenced by the average tourism expenditure. It is higher in destinations with a long season. For Torremolinos, the figure is €17,191 per bed, El Alamein €14,142, Djerba €9,839, and Siwa Oasis €8,376. However, in Alanya it is only €5,937 €, which reflects the low occupancy rate and the low daily expenditure. The index is very low in destinations with very high seasonality, for example Cabras and Castelsardo, and particularly low in destinations where all the above factors are combined, such as Tipaza.

Another important point to study is the changes in parameters influencing both the overall revenue and the efficiency of tourism businesses: e.g. occupancy rate, seasonality, number of tourists and daily expenditure. Torremolinos, Alanya and Djerba are seeing a fall in some of these indicators. Could it be that these mature destinations have begun to decline?

Interesting conclusions can also be drawn from **the analysis of the daily expenditure per capita**. Even though the available information is incomplete, widely diverging expenditure levels can be observed for the same accommodation category. In destinations such as Alanya and Djerba, with a very high percentage of large upscale hotels (4 and 5 star hotels make up 93% of market), the average rate per overnight stay is very low. This is due to pressure from TOs on hoteliers to keep prices down, so that they can offer lower cost

Figure 12 Analysis of daily expenditure per capita



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

package tours. On the other hand, in destinations with a lower quality of accommodation such as Cabras, with no upscale hotels, or Castelsardo, the Tetouan coastal area and Rovinj, with fewer than 20% of the beds in this class of hotel, the TOs play a very minor role, while the average expenditure for accommodation is high. However, it is important to highlight the fact that there are significant differences in accommodation-related data measurements between hotels and the other forms of accommodation.

When expenditure is predominantly on basic services (i.e. accommodation, food and transport), this underlines the poor range of local services offered. This provides additional evidence that the product offered in these destinations is the “3S product”.

The impact of the overall tourism economy on the local economy is denoted chiefly by the share of tourism GDP as a proportion of total GDP in the area. As this kind of data is generally non-existent for destinations in NUTS 3 areas, a proxy measure is required to assess the role of tourism in the local economy. One possible approach is to use employment data. The proportion of employment in the service sector, and HORECA in particular, is increasing in all of the areas surveyed; its role is dominant not only in mature destinations such as Djerba, Torremolinos and Rovinj but also in Alanya and Castelsardo.

The data on employment in tourism, and the production of indicator based on this data, reflect the difficulty in finding reliable and comparable data[15]:

1. Some countries use census data, taking into account only employees who are permanent residents of the area, while others take data directly from companies or employment surveys, which also take non-residents into account.
2. Many jobs are seasonal and seasonality differs from one destination to another, which makes it difficult to compare the data.
3. There is a relatively high proportion of unofficial employment in the tourism sector in some countries, and direct employment in the sector is not always properly recognised by local and national statistics offices, which may not be using the official WTTC classification.
4. In some cases, only employment in hotels or in HORECA is considered. In other cases a wider range of economic activities are included.

Having stated these provisos, the experts’ data suggests that employment in tourism only represents a very low percentage of total employment in the Tetouan coastal area (2.7%)[16]. This destination has fairly low proportion of hotels in the accommodation offer, with residential tourism and social accommodation representing more than 79% of total beds. In addition, the destination has very high levels of undeclared and seasonal working, and tourism is not a very large sector in comparison with other activities. In other destinations, tourism represents between 7% of total employment (Tipaza where other activities such as handcrafts are included) and 20% (Rovinj). In Djerba, employment in tourism accounts for 59% of total employment, indicating an extreme “mono-culture” situation and in El Alamein the figure is 718%(!), which highlights the very high percentage of seasonal workers and the fact that there are no permanent inhabitants in the tourist area.

The impact of tourism on the local economy is also influenced by the “tourism multiplier” which highlights the robustness of the economy (the level of direct “economic leakages” due to imports) as well as “financial leakages” related to employee housing and the owners of tourism companies. The responses from the experts contain qualitative information that does not make possible direct comparisons:

- In Alanya, economic leakages are a significant factor both in terms of goods imports (due chiefly to the “mono-activity” structure of the economy) and in terms of transfers of value added;
- In Djerba, economic leakages affect profit flows to the Tunisian economy, in areas such as equipment, products, labour force;
- In Torremolinos, the multiplier is estimated to be 1.09 when it is 1.52 for the Spanish coast as a whole;
- In Rovinj, economic leakages are low due to links with local producers (fisheries), the special status of the main tourist company (Maistra[17]), and local ownership of small tourist businesses (bed and breakfast, restaurants, etc.);
- In the Tetouan coastal area and Marsa Matrouh, economic leakages are considered to be significant in the big hotels and international chains, as the local economy cannot provide the quality and quantity of goods required;
- In Tipaza, economic leakages are considered to be significant despite the structure of tourism activity (the explanation needs to consider the Algerian economy as a whole).

15 The data from the experts is, in many cases, very different from data provided by the WTTC at a national level. In some cases this can be explained by the fact that the destinations studied are not representative of the situation nationally. In any case, employment data must be treated with caution.

16 The share of tourism in total employment is much higher (between 4.8% and 10.2%) when it is calculated only for coastal municipalities.

17 Maistra is a local company that owns the majority of hotels in Rovinj.

The level of daily expenditure also seems to influence the per capita GDP of the destination in various ways. In Torremolinos, the figure is lower than the Spanish average, which negatively affects the local GDP per capita. However, the opposite is true in Rovinj and Alanya, where the local GDP is higher than the national average. The level of competition between Mediterranean countries, and between them and new low cost destinations, has had very negative economic effects, particularly in countries such as Spain with high standards of living.

What initial conclusions can be drawn on economic issues?

- Mass tourism destinations (e.g. Alanya, Djerba and Torremolinos) have the advantage of long(er) seasons and high(er) total tourism expenditure, but low expenditure per tourist. In these destinations, tourism constitutes a "mono-culture" and is characterised by high economic leakages.
- Destinations with distinctive tourism products (e.g. Cabras, Castelsardo, Rovinj and Siwa Oasis) tend to have well-developed local assets in combination with low TO involvement, resulting in a high expenditure per tourist and low economic leakages but also high seasonality.
- In several destinations (e.g. El Alamein, the Tetouan coastal area and Alanya) domestic tourists normally spend more than foreign tourists that arrive through TOs.

Results and impacts of tourism on social equity

The results and impacts of tourism on social equity include: (i) direct employment generated by tourism (HORECA employment) and its characteristics: gender of employees, duration of employment (contract type), employee qualifications (educational level), location of employees' permanent residence; (ii) how this employment impacts the population dynamics and structure (e.g. activity rate, female activity, educational level) and per capita income.

Even though there is typically no information about changes in direct employment, the number of employees in tourism is generally assumed to be increasing in the same direction (growth) as the change in accommodation supply, but not necessarily at the same rate. In some mature destinations such as Torremolinos, there has been a decline in employment in recent years as occupancy rates and prices have declined. This demonstrates rational human resource management: cost cuts in the face of falling revenue and increasing competition.

The level of direct employment per bed (*Table 4 & Figure 13*) gives an indication of the intensity of job creation per bed. It ranges from 0.09 in Castelsardo to 0.88 in Marsa Matrouh. The Castelsardo figure is due to a combination of high seasonality in employment (the seasonality rate is 77.4%) as well as family labour in very small businesses, multiple job-holding, undeclared employees. The Marsa Matrouh figure, on the other hand, is due to the low cost of the labour in Egypt. Most of the destinations in the sample have a relatively low value, under 0.4. If this data is correct, the normal assumption that tourism is a labour-intensive activity is not confirmed, even in countries with low employment costs, such as Tunisia and Turkey, even though the

Table 4 Direct employment and direct employment per bed

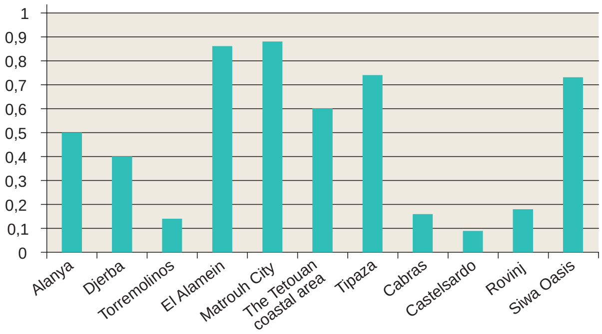
	Direct employment in tourism (HORECA)	Total employment	% direct employment	Employment per bed	Unemployment
Alanya	47,262	104,071	45.41	0.50	15.50
Djerba	18,124	30,579	59.27	0.40	9.30
Torremolinos*	2,385	24,399	9.77	0.14	15.10
El Alamein	1,730	241	717.84	0.86	57.20
Marsa Matrouh	4,400	42,176	10.43	0.88	7.80
The Tetouan coastal area	4,700	174,378	2.70	0.60	9.05
Tipaza	1,962	26,552	7.39	0.74	9.00
Cabras	189	1,604	11.78	0.16	-
Castelsardo	154	951	16.19	0.09	-
Rovinj	1,162	5,668	20.50	0.18	11.00
Siwa Oasis	550	5,822	9.45	0.73	2.40

* Only hotels.

Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

Southern & Eastern Mediterranean Countries have a higher rate of employment per bed than the North Mediterranean ones.

Figure 13 Direct employment per bed



Source: Data from the experts, author's calculations. Destinations classified by type and alphabetic order.

The level of employee qualifications varies significantly between destinations, but it is generally assumed that employees in tourism do not have high qualification levels. Certainly this is true in Alanya, where tourism has attracted unqualified workers from other parts of the country. However, in Rovinj and Marsa Matrouh Governorate, employees have a medium level of education.

In Torremolinos 33% of tourism employees have low levels of education, compared with 10% in the rest of the economy. In contrast to the other case studies in SEMCs, the educational level in the Tetouan coastal area is high in comparison to other economic sectors, with sector-specific education and training. Employment in tourism in the Tetouan coastal area presents better quality features than total employment, but such is not the case in Torremolinos. Morocco being a less-developed country than Spain, a career in tourism is seen as a "high" level job in comparison to the countries' other opportunities.

The seasonality of employment is considered to be a significant disadvantage of tourism, and it is especially high in resort areas. The lowest percentage of permanent employees is in Matrouh Governorate (5%) where seasonality is high, and the highest in Torremolinos (68%), which has lower seasonality than other destinationsS As has already been mentioned, the presence of TOs tends to decrease seasonality: Alanya, Djerba, and Torremolinos. In destinations: where TOs have a minor role, such as Rovinj, Marsa Matrouh, Cabras and Castelsardo, seasonality is higher than in the others, as is seasonal employment.

The impact of tourism on demographic changes in an area is proportional to its importance as a driving force. In all the destinations, and all the more so in resorts or resort towns where tourism is the main or the only competitive activity, such as Torremolinos, Djerba and Alanya, there have been significant population increases due to migration. This has not only been in response to increased demand for labour in sectors directly and indirectly related to tourism (e.g. construction, real estate, retail and transport) but also in response to the induced demand from the new population in the area. High birth rates in Southern Mediterranean countries are also a factor; low activity rates are mainly explained by low levels of female participation and a very young population (under 15 years).

The importance of tourism in an area is not always reflected in demographic changes, because a number of employees are not permanent residents of the area and consequently are not recorded as such during censuses.

An "**indirect employment multiplier**" is given for a number of destinations such as Djerba (3.5), the Tetouan coastal area (1.7), and Alanya (1.5). This could also explain differences in economic leakages, but this data is not always borne out by national figures (see national reports from the WTTC - www.wttc.org).

Tourism seems to have an impact on average salaries in the destinations. In Rovinj, salaries are higher than in the rest of Croatia: €775 compared to €585, and the local per capita GDP is €12,463, compared to a national average of €9,656. However, in Torremolinos the average income is €17,620 compared to €22,260 in the rest of Spain.

What initial conclusions can be drawn on social equity issues?

- Tourism undoubtedly creates employment and revenue opportunities, mainly in countries and areas with difficulties in creating enough new direct and indirect jobs to absorb new arrivals in the labour market: e.g. young people, women. In less-developed countries tourism is considered as a good career opportunity and attracts relatively well-educated people, mainly to jobs in hotels and resorts.
- In 3S international destinations that are dominated by TOs, even though the operational period covers almost the whole year and permanent employment is normally higher, employment per bed is not high due to efforts to rationalise human resource costs in order to compete with other similar destinations.
- The most significant negative aspects of tourism are seasonal and undeclared employment.

Results and impacts of tourism on the environment

The results and impacts of tourism on the environment cover: (i) pressure from tourism on the destination's environment due to land use, natural resources consumption (in particular non-renewable) and waste production; (ii) how this pressure impacts the environment of the destination area and, more precisely, its various components: drinking water quantity and quality, seawater quality, soil quality, biodiversity, as well as landscape quality and urban environment.

Environmental pressure from human presence can generally be estimated by the number of people concentrated in an area. An initial estimate of the maximum pressure from tourism is measured by the number of tourist beds in all types of accommodation per unit of area[18]. In our case studies, this figure is very high for 3S mass tourism destinations: calculated between 3,400 and 4,800 beds per km^2 for the tourism areas (*Table 2*). It is also quite high in destinations such as El Alamein (1,000), Marsa Matrouh (625), Rovinj (503) and the Tetouan coastal area (472).

A finer analysis is needed to examine the pressures and impacts on every component of the environment, based on well documented information about the direct effects of tourism: land use changes, biodiversity losses, energy and water consumption, solid waste and wastewater production, noise, etc.

18 Environmental pressure also has to take into account the effect of second homes owned by non-permanent residents as well as other private houses rented to tourists; quantitative information for this type of "accommodation" is lacking in most of the destinations.

Urbanisation is one of the principal and permanent results of tourism in a destination. Its actual effects depend mainly on the intensity of the phenomenon, but also on the development model implemented for land-use planning. The construction of new general and tourism infrastructure projects, including accommodation, in an area is an indicator of increasing pressure. It results in land use changes, from a natural to artificial landscape. Alanya, Djerba, Torremolinos and El Alamein are examples of high urbanisation due to tourism. These areas – with a non-existent or very low population level and very small built-up areas prior to the development of tourism – have experienced "urban explosion".

Torremolinos is the most extreme example (*Figure 14*), where about 65% of the 20 km^2 of municipal land is now urbanised, including infrastructure and amenities[19], or in the process of being urbanised. This compares with 47% in 2002. Natural vegetation is now only found in inaccessible locations: high up on steep slopes; 29% is now scrubland (down from 43.1% in 2002); 3.5% is wasteland (abandoned agricultural land) and pasture; 0.15% is forest and 0.59% rivers.

In Alanya (*Figure 15*) and El Alamein as well as Djerba and the Tetouan coastal area, there is also substantial urbanisation. However the pattern is different: more compact in the first case and more diffuse in the second. More specifically, since 1973, when tourism development was first regulated through a Tourism Plan in Djerba, 11.8 km^2 of coastal land has

19 The tourist area calculated using Google Earth is estimated to be 8.3 km^2.

Figure 14 Land use in Torremolinos (Spain). Comparison between 1957 and 2001

Source: Torremolinos case study, Navarro Jurado 2011.

Figure 15 Picture of Alanya (Turkey)

Source: http://www.antalyasonhaber.com/haber/eksayfalar/antalya/images/antalya/by/Alanya.jpg

been earmarked for tourism (3.2% of the area of the two communes affected) on the basis of 100 beds/ha.

In Cabras, Castelsardo, Siwa Oasis, and even in a mature destination as Rovinj (*Figure 16*), tourism buildings have less of an impact on the town and the landscape. The traditional nature of the settlement and the rural areas have not been disturbed. Similarly, only 3.1% of the total area in Cabras is urbanised and 5.5% in Castelsardo, even though there has been rapid growth in the built-up areas over the past twenty years. Finally, the changes in Tipaza are mainly due to the growth of the permanent population (metropolitan area of Algiers) rather than tourism development, which has been relatively slow until now.

Figure 16 Rovinj (Croatia)

Source: http://www/skyscrapercity.com

The pressure from human and tourism settlements tends to be concentrated on the coastal strip (beach front) and has generally blighted the natural landscape. Indeed across the whole Mediterranean region, the tourism product developed has been almost exclusively 3S. An extreme example is Torremolinos, where 85% of this zone is manmade, to the extent that sand regeneration no longer occurs naturally, requiring local authorities to fill the beaches artificially. In El Alamein, the seafront has been transformed into artificial lagoons and a yacht port; a similar situation, although less acute, can be observed in Marsa Matrouh.

Figure 17 Views of the beach in Marsa Matrouh (Egypt)

Source: (IDSC) Matrouh Governorate

In Alanya, 50 km of the 70 km coastline is occupied by 4 and 5 star hotels and holiday villages, or by restaurants, bars and discos that try to be near or even on the beach. Almost the whole coastal area of Tetouan is urbanised: tourism and residential settlements, marinas, and dams built for water supply. The expansion of urban areas has eradicated natural zones and wetlands, destabilising the ecosystem. In Djerba, all the hotels built in the tourist zone have their main façade on the sea front. Other buildings with a direct or indirect connection with tourism have been constructed in the immediate vicinity of existing settlements.

On the other hand, Cabras, Castelsardo and Rovinj limit the pressure on their coastlines. In the area belonging to the town of Rovinj, the "artificialiation" of coastal zones is low and is mostly visible in the town centre, where "artificialisation" started many centuries ago. The beaches in the tourist areas outside the town centre are also preserved in a natural state. In Cabras, the existence of the MPA has preserved the coastline and the beaches. In Castelsardo, where the town is on the sea front, the most significant change has been the construction of the port.

Figure 18 Castelsardo (Italy)

Source: http://www.portodicastelsardo.com/component/option,com_wrapper/Itemid,88/lang,italian/

The land area “consumed” for each tourist bed[20] can only be calculated in two destinations:

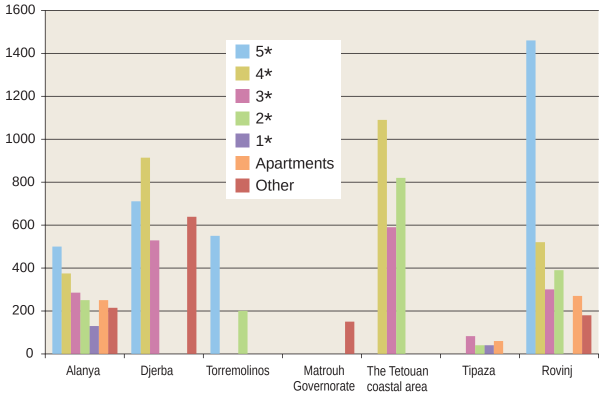
- In Djerba, where all the hotels (45,311 beds) are located in a very distinct area of 11.85 km^2, 261.5 m^2 is needed per bed;
- In Alanya, where analytical data is provided for the area occupied by tourism and specifically by hotels, there are 147,571 beds in hotels and secondary accommodation in an area of 30.2 km^2, i.e. 204.7 m^2 per bed.

Water consumption is increasing relatively quickly in all of the destinations due to increasing numbers of both permanent and non-residents; the latter mainly visit the destinations during the high season which drives a very clear seasonal increase in consumption. This does not take account of water pumped illegally from wells and boreholes by many hotels.

In Djerba water consumption in 2008 was 4.8 million m^3, compared to 4.2 million in 2002, and consumption in the three-month high season (July, August, September) was twice as high as the low season consumption (December, January and February). A large proportion of water is used to irrigate lawns and gardens and for swimming pools. In Torremolinos the daily water consumption in 1999 was estimated to be 42% higher during the high season (10,892 in comparison to 7,624 m^3 during the winter time). In Alanya the increase in water consumption due to tourism was 32.8% over the period 2002-2008. In Castelsardo only 8.9% of the water consumed is used by the tourism industry; in Cabras this figure is even lower: only 1.4%.

The consumption of water per night spent is quite high in some of the cases exceeding EU[21] average consumptions. Consumption is extremely high in 5 star hotels in Rovinj: 1,400 litres per night spent, although this includes water consumed in large spa areas connected with the hotels. However, this does not create problems as the availability of water is high due to the climatic conditions in Croatia. The water consumption is also high in destinations with low levels of precipitation and a lack of water, such as Djerba. As reported, in Tipaza the consumption is much lower than in other destinations studied, and Alanya seems to follow the different thresholds according to the hotels’ classification.

Figure 19 Water consumption (m^3 per night spent)



Source: Data from the experts. Destinations classified by type and alphabetic order.

Water availability is an important issue, since the Mediterranean area only receives 3% of global water resources (Plan Bleu, 2009). The coastal areas with the most significant issues are in Tunisia, Algeria, Morocco and Egypt; these are classified either as areas in stress or in scarcity. Most of Spain’s coastal areas, primarily where Torremolinos is located, are also under stress, while Sardinia seems in a vulnerable situation.

Two main indicators are commonly used to detect water problems: the availability of fresh water resources and the water exploitation index. The exploitation index is high in Egyptian and Tunisian destinations as well as on the Spanish coast. One destination where acute problems are reported is Djerba, where drinking water is either imported from the mainland or obtained by desalination. Scarcity is also reported in Tipasa, Matrouh Governorate and Sardinia. Drinking water is imported to Marsa Matrouh from the Alexandria area, either by pipeline or with trucks; since 2005 desalination plants have been used for drinking water production either from the sea or from wells with high salinity. Even if there is no data proving that tourism is responsible for this problem (agriculture is generally a bigger consumer), the fact that water consumption increases during the high season is evidence of the additional stress that tourism creates.

20 This area is not totally built-up, since in most cases and mainly in resort hotels there are “green spaces” (e.g. gardens) within the hotel installations.

21 Average water consumption is 394 litres per night spent, with a range from 355-594 litres (Hamele and Eckardt, 2006). Data from the Hellenic Association of Hoteliers for the certification of hotels considers that, for mid-range fully serviced hotels, consumption over 960 litres is excessive, between 600-960 high, 450-600 satisfactory, and below 450 litres is excellent. The thresholds differentiate between different accommodation categories and are higher for luxury hotels while for low budget hotels and B&Bs they are much lower (www.benchmarkhotel.com).

Wastewater production is linked to the quantities of water consumed. The problem lays in the wastewater management systems already existing in the area. The problems for tourism installations located in urban areas that have to be connected to the existing network are different from those facing establishments outside the urban areas that have to construct their own systems to treat their wastewater. In most destinations, the urban sewage system is already inadequate for collecting and treating the increasing quantities of wastewater from permanent residents, and tourism tends to exacerbate this problem.

The infrastructure is often inadequate even in well-established destinations. In Torremolinos, the first wastewater treatment station was constructed during the 1980s. In Rovinj, there is still some dumping of wastewater directly into the sea. In the Tetouan coastal area, the urban centres along the coast have sewage systems that serve only part of the population, ranging from 40 to 80% depending on the urban centre. The remaining effluent is discharged directly into the sea and lagoons without treatment, causing pollution and health problems. Even in towns in the Tetouan coastal area with treatment systems, the growing non-resident population creates problems: only four tourist complexes have their own treatment system. Most of the wastewater in Alanya is treated before discharge into the sea and rivers. In Matrouh Governorate, only a few hotels, constructed post-2005, have sewage treatment plants; wastewater from other establishments, or from the town, is either treated in septic tanks or discharged directly into the sea.

The only destinations that seem to have a better situation are Djerba and Sardinia. In Djerba, there are three wastewater treatment stations on the island, treating 22,250 m^3 per day. Some of this water is re-used to irrigate the golf course. The percentage of non-treated wastewater in Castelsardo and Cabras is 0%. All wastewater in the municipalities is treated and reused by agriculture for irrigation, as well as in other economic activities.

Despite the lack of data on **waste production** for the majority of destinations studied, solid waste production per capita seems to be close to the European average of 2 kg per night spent, except for Alanya where it is 1.25 kg. A survey carried out by the Hellenic Association of Hoteliers argues that good performance means that production should be lower than 1 kg. The most significant problem seems to be the lack of efficient treatment systems in most of the destinations, and the fact that recycling is virtually absent in all destinations.

Energy consumption is difficult to evaluate, as hotels and other installations use a variety of resources: electricity, propane, diesel, gas (electricity is generally more expensive). Even though the data is not directly comparable, information from the various destinations suggests that consumption is increasing, sometimes more rapidly than the number of nights spent. In Torremolinos there was an increase of about 85% over the period 2000-2008, despite a decrease of 16% in overnight stays. In Alanya, there was an increase of 13% over the same period, without any increase in nights spent. In Matrouh Governorate, annual consumption by hotels increased by 181% between 2000 and 2009, while the number of nights spent only doubled. Energy consumption by non-residents also rose quickly in Cabras (63%) and Castelsardo (52%) over the period 2002-2005. Data is not fully available for Djerba, but energy consumption from tourism is three times higher during summer than during winter.

In order to compare energy consumption between destinations but also to measure the efficiency of the sector, consumption per overnight stay was proposed[22] as a suitable indicator. In Torremolinos, consumption has increased from 16.2 to 35.9 kWh per overnight stay; in Matrouh Governorate from 53 to 72. In Rovinj, consumption is estimated at 30.2 kWh in hotels but 6.2 in resorts and 4.0 on camp sites, while in Tipaza the estimate is 23 kWh. Compared to European benchmarks[23], consumption from hotels seems to be close to European norms – with the exception of Matrouh Governorate.

There are no reports of significant use of renewable energies such as solar energy, or energy savings programmes.

Urban sprawl is either directly caused by tourism, or indirectly in order to host the permanent or seasonal immigrants working in tourism related companies. This expansion causes the **loss of natural ecosystems**, as well as **soil degradation and biodiversity reduction**. The damage is more significant when valuable habitats such as forests and lagoons are affected.

In the Tetouan coastal zone, several lagoons and wetlands that provided a natural habitat for migrating and wintering wildfowl have gradually disappeared by being drained and built on. The unique forest of Cabo Negro, which was a habitat for many valuable species of birds, is now under threat as real estate developers are lobbying to have the existing protection scheme abolished. In Torremolinos the disappearance

22 Other studies use kWh/m^2 of serviced area as an indicator.
23 SUTOUR-Tourbench, environmental initiatives by European tourism businesses.

of almost all natural areas near the sea (e.g. dunes, wetlands) has led two species to the brink extinction: the Common Chameleon (*chamaeleo chamaeleon*) and the plant species known as “evergreen malagueña” (*limonium malacitanum*).

Urban sprawl has also had a negative impact on the **landscape**: many new buildings and tourism infrastructure projects are constructed not only near existing urban areas, but also close to unspoilt rural areas. Since most of these buildings are not designed in line with the local architectural vernacular, they have diminished the quality of tourism product in various destinations, including Alanya, Djerba, Matrouh Governorate and the Tetouan coastal area.

Urban quality of life is most relevant to destinations that are integrated with new or old towns. Social pressure from the presence of tourists and holidaymakers, and the deteriorating quality of life due to urban quality issues, affect the welfare of the local community. Urban quality of life is affected by the high human pressure from tourists and holidaymakers, leading to issues of congestion and noise, quality of urban design and of green spaces. Only a few destinations have policies to tackle these problems, including Rovinj, where local architecture is protected and pedestrian areas, parks and open public areas are being created.

In Torremolinos, which has very high population density during high season, at 10,000 inhabitants/km^2, issues of traffic congestion, noise and atmospheric pollution, in combination with the lack of green spaces and low quality urban design, have created a negative impact. Similar problems have been noted in other destinations, even if there are some mitigation policies in place: e.g. creation of green spaces and pedestrian zones in Alanya and Matrouh City.

The quality of the built environment is low in most 3S destinations and recent efforts to encourage “better” buildings cannot remediate the damage that has already been done.

Noise is one impact from tourism that is rarely assessed and evaluated. There are a range of noise sources, including bars with terraces, cooling and air-conditioning machines that generate over 60 decibels (Torremolinos), traffic problems such as bus horns and traffic congestion in Alanya, and high population density in general: e.g. Matrouh City and El Alamein with 56 and 53 decibels.

Beach erosion is a significant issue in Torremolinos, Alanya and Djerba, where hotels, other buildings, and intensive use have created serious problems. The authorities are obliged to intervene with costly erosion-prevention measures. There is also serious over-use of the coastal strip in the Tetouan coastal area, El Alamein and Marsa Matrouh, creating irreversible phenomena. Dunes that have been cut off from the beach by various developments and buildings cannot be rehabilitated (irreversible losses).

There are problems with **seawater quality** in some destinations: Marsa Matrouh, Torremolinos, and the Tetouan and Tipaza coastal areas. In Torremolinos, pollution spots appear every year in the sea as consequence of inadequate wastewater treatment; consequently none of its beaches have been awarded the “Blue Flag”. In the Tetouan coastal area, some beaches are located close to wastewater outfalls where the quality of water does not meet “Blue Flag” standards. No problems are reported for Alanya, Djerba and Rovinj. In Rovinj, all the five main beaches have “Blue Flag” status, and in Alanya the number of “Blue Flag” beaches has increased rapidly in recent years.

Marine ecosystems are not only threatened by pollution. Endangered species such as the Mediterranean Monk Seal (*Monachus monachus*) and the loggerhead sea turtle (*Caretta caretta*) are even more threatened by tourism, since it causes additional disturbance to individuals and breeding colonies.

What initial conclusions can be drawn on environmental issues?

- Environmental pressure is very high, mainly in the 3S mass tourism destinations (international and domestic, including Rovinj).
- Environmental pressure is concentrated on the coastal strip (beach front) and has generally disfigured the shoreline.
- The urbanisation of an area is one of the main and permanent results of tourism in a destination. The impact of tourism on landscapes, biodiversity, quality of the urban environment and natural resource quality (mainly beaches) depends on the development model and the extent to which rules and restrictions have been applied.
- Problems related to drinking water quantity and quality, seawater quality, energy consumption, and noise are mainly reported in the 3S destinations.

System analysis and tourism sustainability: from stakeholders to destinations

After having presented the information collected from the destinations about the results and impacts of tourism and its different components, it is now necessary to carry out a system analysis in order to assess the sustainability of the activity and its impact on the destinations, as well as the roles of the various stakeholders.

Locations: various models

There are two main types of destination with regard to the level of integration with, or disconnection from, a settlement:

1. **In resort-destinations and resort-towns** – such as Alanya, Djerba, El Alamein, the Tetouan coastal area, and Torremolinos, where an unoccupied or almost unoccupied area was built up mainly in response to direct, indirect or induced tourism demand –, tourism is the main, and in some cases only, competitive activity, and it has shaped the economy, society, landscape and the environment. The expansion of non-professional accommodation, mainly second homes, individual houses and apartments, generates significant pressure in some of the destinations, not only the Tetouan coastal area and Torremolinos, but also El Alamein. This phenomenon, which is growing in scope all around the Mediterranean basin, results in substantial urban sprawl. The rate of use of this residential property is low compared with professional accommodation, and lower economic activity in terms of direct tourism expenditure and employment. The main beneficiaries of this trend are real estate companies.
2. **Town-destinations** – including Cabras, Castelsardo, Marsa Matrouh, Rovinj, Siwa Oasis and Tipaza – have a history apart from tourism; tourism is not the only economic sector. In each case tourism has played some greater or lesser role in the development of the town, with the exception of Tipaza. In Cabras, Castelsardo, Rovinj and Siwa, development has taken place without "disfiguring" the landscapes, either due to the re-use and upgrading of existent buildings, or through controlled expansion.

These two situations illustrate two different tourism models. The first prioritises the holiday over the location and results in tourist facilities which are disconnected from their locale. In the second model, the "place" matters most for tourists when they make their choice of destination; this leads to tourist facilities which are integrated with their locale.

The various external or internal stakeholders play a determining role in this development. TOs and investors have "pushed" destinations to expand their built-up land area. In many cases they have been supported by national and/or local authorities (depending on the extent to which the political system is decentralised), and a local community looking for more and more "development", more and more "revenue" (including foreign currency), and more and more employment. Whenever local players and NGOs have played a stronger role in regulation, expansion has been more limited and controlled.

The urbanisation of natural areas is one permanent impact of tourism that marks a destination forever, by consuming non-renewable resources such as landscapes and soil. In addition to urbanisation, tourism puts pressure on other relatively scarce but important resources such as water, habitats and biodiversity. In many of the cases studied, these considerations were not taken into account, even more recently when the concept of sustainability has been emerging. Water consumption per capita (both legally and illegally sourced) and energy consumption is quite high, and waste disposal is often uncontrolled. The quality of urban areas and quality of life for tourists and permanent inhabitants do not seem to be a priority for planners and national/local decision makers.

Economy: various approaches

Tourism has undoubtedly brought "growth" to all the destinations. The main beneficiaries have been the HORECA sector, and other directly and indirectly tourism-related services such as retail, transport, etc., which are developed to meet the direct, indirect and induced local demand. Other economic activities, mainly the primary and secondary sectors, have rarely benefited from this expansion and have more often been abandoned as "traditional"/non-competitive and less profitable than tourism.

The GDP generated by tourism depends on:

- The kind of the activities developed locally in order to attract tourists and encourage tourist expenditure. Local supply is often "poor" and concentrated on low added value activities such as HORECA and other services needed to meet the direct tourism demand locally. The development of real estate projects and "residential tourism" further intensifies the black economy as its impact on employment is almost non-existent after the construction phase.

It is also characterised by low daily expenditure, and the additional GDP “produced” is not real, but implicit, because no direct production results from the use of second homes.
- The control exercised by external bodies. When TOs are heavily involved, the per capita expenditure remains low, mainly for accommodation, and generally for the whole tourist package as in Alanya and Djerba where “cheap all inclusive packages” have proliferated, and the presence of external investors has led to high “financial leakages”.
- The development level of destinations that cannot satisfy the indirect and induced demand. As most of the destinations studied do not have a strong local economic base, most of the additional demand (e.g. for food products) leaks out of the destination and the host region. One reported example is the Tetouan coastal area where international companies cater directly from outside of the area. The trend for increasing “mono-activity” in some of the destinations reinforces this situation.

The additional GDP created by tourism does not change the profile of the destinations vis-à-vis more competitive regions. The regions are not innovating and developing new activities, but remain dependent on floating external demand. The increase in the local tourism offer, and the increasing worldwide offer with the same product in other destinations, means destinations are increasingly vulnerable.

Every destination obviously has its own distinctive characteristics, but the destinations studied can nevertheless be classified in three groups:

- **“Non-integrated 3S mass tourism destinations”** (i.e. Alanya, Djerba and Torremolinos) are dependent on external stakeholders and have a more vigorous development pattern built on a global tourism product. This product interacts in only a limited way with the local economy, and the development of local resources is not a goal. The levels of GDP and employment created are high, as are economic leakages, partly due to the major role played by TOs.
- **“Mixed 3S destinations”** (i.e. El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas) are focused more on domestic tourism and second homes, with dynamic external stakeholders and real estate sector; the development of local resources is not a goal. The levels of GDP and employment created are low, with lower economic leakages but a substantial black economy.
- **“Integrated destinations” with distinctive tourism products** (i.e. Cabras, Castelsardo, Rovinj, and Siwa Oasis) are destinations which draw to a greater or lesser extent on the merits of the location and its distinctive characteristics, are looking to develop local assets and to diversify the offer and product in order to attract tourists with special interests. These destinations are characterised by lower economic activity and lower employment, but higher expenditure per capita and lower economic leakages.

Society: tourism and employment

The growth of tourism has impacted local societies in different ways: creating new direct and indirect employment, generating an increase in female and youth activity, shifting the economy away from “traditional” activities (i.e. agriculture and crafts) to the service sector. This has led to social mobility and “modernisation” of society, to seasonal and permanent immigration, with a population increase in the destination, and additional income.

One key indicator of the impact of tourism on a local society is employment. Based on data from the experts, the destinations can be grouped differently from the previous classifications:
- Employment per bed is low in the developed countries, where efficient management of human resources (high cost) is a goal.
- Employment per bed is at a medium level in intermediate developed countries, where tourism is an “industrialised” activity with large upscale hotels, and there is efficient cost management.
- Employment per bed is high in less-developed countries where labour is cheaper and more readily available.

This classification by destination fits with the classification based on national figures, even though in many cases employment is seriously underestimated at the local level. This underlines the reservations stated regarding the validity of data available at the local level, but also the different methods used to estimate employment levels – even if the destinations studied are not always representative of the countries they belong to.

Two aspects of tourism employment are considered as negative characteristics:
- **The high seasonality of the employment**, related to the operational period of the destination[24];

24 However, the negative impact of the high seasonality may be minimised insofar as seasonal tourism employment, articulated to forms of “pluriactivity”, has contributed, especially in mountain destinations, to reduce poverty and maintain populations on site, limiting the rural exodus.

Table 5 Employment per bed in the destinations and the correspondent countries

	Employment per bed (1)	Intensity of direct employment (2)	Direct employment per bed Countries (3)	Intensity of direct employment Countries (4)
Alanya	0.50	Medium	0.65	Medium
Djerba	0.40	Medium	1.07	Medium
Torremolinos	0.14	Low	0.32	Low
El Alamein	0.86	High	6.41	High
Marsa Matrouh	0.88	High	6.41	High
The Tetouan coastal area	0.60	High	5.87	High
Tipaza	0.74	High	3.42	High
Cabras	0.16	Low	0.39	Low
Castelsardo	0.09	Low	0.39	Low
Rovinj	0.18	Low	0.93	Medium
Siwa Oasis	0.73	High	6.41	High

Sources: (1) Experts, (2) & (4) Author's appreciation, (3) WTTC data. Destinations classified by type and alphabetic order.

- **The low educational level of employees**, which inhibits the creation of new knowledge and the acquisition of skills needed for the development of new competitive activities. The few skilled employees needed in tourism (i.e. managers) are "seasonal immigrants", often "imported" either directly from developed countries or from the nation's economic centre.

Direct employment:
- is higher, less seasonal, and more qualified in the 1st category of destinations (Alanya, Djerba and Torremolinos) due to the number of beds, long operating period, and higher quality of hotels;
- is lower and more seasonal in the 2nd category of destinations (El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas) due to the importance of second homes, the shorter season and informal tourism activity;
- is fairly high in Rovinj and Siwa Oasis due to an intermediate length of operating period, but is quite low and seasonal in Cabras and Castelsardo due to high seasonality.

From Sustainability of tourism to Sustainability of destinations

On the basis of the above analysis, the eleven destinations studied have been categorised into three, not entirely homogenous, groups:
- Mature International 3S Destinations / Declining of economic, social and environmental sustainability of the whole host area,
- Growing Domestic 3S Destinations / Threat on the destination sustainability, and
- Destinations with a Distinctive Tourism Product / A route to sustainable development?

This categorisation and the presentation of the most significant strengths, weaknesses, opportunities and threats for each group, are presented below and in Tables 6, 7 and 8.

Mature International 3S Destinations - Declining of economic, social and environmental sustainability

This group includes the three larger destinations that focus on international 3S mass tourism, operate throughout the year, and are dominated by TOs: Alanya, Djerba and Torremolinos.

Analysis of the data suggests stagnation and even a decrease in supply and demand, reflecting lower economic results than previous years. There has also been serious environmental damage in these destinations. These trends would seem to suggest that these mature, non-integrated global destinations, where tourism is the main economic activity, are facing a decline that undermines the sustainability of the whole area.

Even if their paths have not always been the same (Alanya is a recent destination compared to the other two, Djerba has followed a more planned development, and Torremolinos is becoming a residential destination), these destinations share many common characteristics, as the following SWOT analysis shows (*Table 6*).

This analysis also serves as an introduction to the policy measures needed within the destinations in order to reverse the trend. The question is whether “rejuvenation” is still possible for these destinations in order to produce a competitive “tourism product” in the new tourism era, and at what cost. A definition of what “rejuvenation” means in the context of each destination is also still required.

Growing Domestic 3S Destinations - Threat on the destination sustainability

The common characteristic of these destinations is the increasing dominance of domestic demand. This has led to a large number of new residential properties in El Alamein, Marsa Matrouh, and the Tetouan and Tipaza coastal areas (*Table 7*). In El Alamein and the Tetouan coastal area, the national elite seems to be the target clientele, although these destinations also have a significant share of international tourists. Tipaza is exclusively a domestic destination with a very short tourist season. The clientele of Marsa Matrouh is more balanced in terms of international/domestic clients as well as in terms of social categories of customers.

In El Alamein and the Tetouan coastal area, the offer seems to be controlled by real estate companies, which often include an “alibi hotel” in the middle of their residential developments. This approach gives these destinations a character that is different to traditional tourism destinations. Is this “model” more sustainable than the previous one? The answer is “no” in respect of the environment. This pattern of development endangers ecosystems and consumes valuable resources, and there is not enough data to support the argument that it is a success in economic and social terms. In addition, since this “model” is based principally on land annuities and speculation, it will inevitably consume more and more non-built areas to maintain its own “sustainability”.

Destinations with a Distinctive Tourism Product: a route to sustainable development?

The category “Destinations with a Distinctive Tourism Product” (*Table 8*) refers to destinations that have a special character. They have developed an image that is in line with their distinctive characteristics: Rovinj, the oldest of the destinations, which has re-emerged after the decline due to the war in the former Yugoslavia, and Siwa Oasis are attracting an international clientele, while Cabras and Castelsardo focus chiefly on national tourism.

The group is less uniform; it includes one non-coastal destination (Siwa Oasis, the only one in this project), an old mature destination with large numbers of international visitors (Rovinj), and two small domestic destinations (Cabras and Castelsardo). Their common feature is that they have all promoted their destination based on their cultural and natural assets, rather than on the “sun, sea, sand” mantra. In these destinations, the “place” matters and tourism activity seems to be better integrated into the local economy. Economic performance is high, possibly due to the low dependence on TOs. The main disadvantage is the lower economic and social results compared to other destinations, due to high seasonality, which mainly applies to Cabras and Castelsardo.

Table 6 SWOT Analysis. Mature International 3S Destinations - Declining of economic, social and environmental sustainability

Strengths	Weaknesses
- High level of tourism GDP and employment - High quality of accommodation, prevalence of upscale hotels - Low seasonality	- Decline in various indicators such as occupancy rate, seasonality, income per bed - International (global) product with no development of local cultural and natural assets - Major dependence on TOs and one or two nationalities of tourists - Increase of cheap "All Inclusive" offers in order to stay competitive - Low daily expenditure - "Mono-activity" based on tourism and economic leakages - Little diversification of the offer (based on hotels/resorts) - Low-skilled labour force - High resource consumption - Environmental and quality of life issues - High pressure for further expansion - Rising costs of destination management and "rejuvenation"
Opportunities	**Threats**
Rejuvenation through a focus on quality and product diversification	- Increasing global supply and competition from new destinations - Climate change

Table 7 SWOT Analysis. Domestic 3S Destinations – Threat on the destination sustainability

Strengths	Weaknesses
- Increasing national tourism - Low pressure in terms of beds per population and beds per area - High daily expenditure (except Tipaza)	- High percentage of black economy - Low quality of offer - Low percentage of hotel beds and importance of second homes - Low impact on economy and employment - Low employment and low quality of labour force - Lack of planning, increasing environmental pressure - Limited local control over resources and the development process - High environmental pressure from residential tourism
Opportunities	**Threats**
- Emerging demand for sustainable tourism destinations - Possible integration between coast and hinterland - Development of domestic tourism demand	- Increasing global supply - Climate change - Increasing demand for residential houses

Table 8 SWOT Analysis. Destinations with a Distinctive Tourism Product: a route to sustainable development?

Strengths	Weaknesses
- Product diversification based on local assets - Relatively high per capita expenditure - Low dependence on TOs - Low economic leakages - Diversified economy - Local population levels remain steady - Low environmental pressure - High local control on resources and development process	- High seasonality - Low occupancy rate - Low total income - Limited promotion with difficulty in reaching the consumers - Low job creation
Opportunities	**Threats**
- Emergency of "new" demand for a high-quality diversified product - General decline of 3S and mass tourism destinations - Further differentiation of tourist demand	- Lack of funding for adequate polices due to economic crises - Competition from new destinations offering a similar product - Climate change - Increasing demand for residential houses

Policy implementation: assessment of the destinations studied

The following sections present:
- Actions by national and local authorities to promote tourism development and address different problems linked to: supply and demand; improving the results tourism through the way companies operate; improving the impact of tourism within the destination;
- An overview of proposals by the experts for a sustainable tourism policy.

National and local policies

The mission of national and local governments is to promote the welfare of their populations by addressing short term problems and by planning long term actions in order to achieve sustainability goals. With regard to the development of tourism, the actions of public authorities can be examined through their policies to promote supply and demand, to regulate the operation of the private sector, and to improve the impact of tourism on the destination and the country's sustainability.

The national and local policies can be presented through three categories:
- Policies and governance for tourism development and planning;
- Policies for improving the results and performance of tourism towards sustainable development;
- Policies for improving the impact of tourism on the destination's sustainability by better integration of development strategies.

Policies and governance for tourism development and planning

The paragraphs below deal with the policies that public authorities, in particular central governments, have applied in order to promote tourism supply and demand in the various destinations studied.

Wherever tourism development is promoted (usually with an initial focus on international tourism), there are clearly certain general and common goals such as foreign currency acquisition, GDP creation, increasing employment. Goals such as regional and sustainable development have been added more recently.

Policies for tourism development: three different "schools" of planning

Three different "schools" of planning can be identified in the destinations studied:

1. **A "free market" or "Anglo-Saxon" school** where the State plays a "discreet" role or is "absent" on issues of land-use planning and protection of different assets but "present" in assisting development projects. Examples of this approach are seen in Alanya (Turkey), Torremolinos (Spain), El Alamein and Marsa Matrouh (Egypt).

   A recent example is Alanya[25], which is part of one of the priority tourism zones identified by the central government in 1982, with the main goal of attracting private and public investment without any land-use planning but with generous monetary and other incentives to meet short term policy objectives, chiefly the maximization of foreign currency earnings. Tourist revenue has increase around 134-fold over a 34-year period (1975-2008).

   Generally, in countries with a "free market" approach, the State intervenes to facilitate private investment, by removing administrative "barriers" and offering incentives, without any restriction on the land use, the urban planning and the architecture of buildings. It therefore comes as no surprise that urbanisation from tourism infrastructure is very high and the quality of the built environment is low. Due to the high demand for second homes (flats, chalets, and villas and condos), encouraged by national or local authorities through various facilities (mainly loans: i.e. Real Estate Finance in Egypt), the concentration of buildings has increased in all these destinations. Other measures to promote the growth of tourism include the liberalisation of port services, review of hotel construction laws to eliminate restrictive procedures for licensing hotels, tourism establishments and foreign investments, and the facilitation of the purchase of holiday homes by foreigners.

   Environmental protection legislation does not seem to be effective and properly applied. In

25 6,489 beds in 1980, 147,571 beds in 2008; 88.3% of tourists arrive via tour operators; foreigners accounted for 96.06% of total nights spent in 2008.

Figure 20 Hotel in Marsa Matrouh and Tourist complex in El Alamein (Egypt)

Source: (IDSC) Matrouh Governorate

Egypt, for instance, even though the Executive Regulation Law (4/1994) for the protection of the environment stated that "it is prohibited to issue building permits for the construction of any establishment on the seashores of Egypt at a distance of two hundred meters inwards from the seashores, except after obtaining the approval of the Egyptian General Authority for the Protection of Beaches…", its impact cannot be readily seen in the areas studied. Adel Aly Ahmed Rady reports "over-consumption of the shoreline natural resources in Matrouh City and El Alamein by tourists and infrastructures" (2011).

The situation is even worst in Torremolinos where the entire plain and the shoreline are totally urbanised. Human pressure comes from the 63,077 residents, 28,250 beds in official tourist accommodation and 64,160 beds in second homes, as well as the general and tourist infrastructure (highways, marina, coastal promenades) and other services for tourists and residents (retailers, restaurants, cafes). This pressure has decimated all the natural areas, cut off or diminished the natural water supply resources, and altered the natural morphological dynamics of the coastline accumulation and erosion process. The traditional fishing village from the 1950s has disappeared without a trace.

Torremolinos and its pattern of development (have) represent(ed) one paradigm tourism development in the Mediterranean. However, this model is unsustainable, and thus represents "a brick wall into which SEMCs are driving head on" without anticipating the environmental impacts (Berriane, 2011). There are many examples of countries and destinations that depend on mass tourism and that have underestimated the value of their heritage. This can be explained by the prevailing international trends, and by national policies for attracting overseas tourists, regardless of the environmental cost.

How can the SEMCs resist the lure of property developers when a large part of their population lives below the poverty line? The alternatives must undoubtedly be sought in balanced solutions that acknowledge the need to maintain and preserve on the one hand, but also to develop and enhance the carrying capacity of the Mediterranean territories on the other. In any case, the experts thus underscore the limits of the mass tourism resort model whose main attraction is its beach. How can job creation and revenue generation to escape

Figure 21 Urbanisation of Torremolinos (Spain)

Source: http://www.delcampe.net

poverty be reconciled with an approach that does not destroy the potential on which tourism development is based?

The effectiveness of environmental legislation and more specifically coastal protection regulations seems lower than the “(economic) development goals”. In comparison with “sustainability goals”, “(economic) development goals” have been prioritised in all the destinations and throughout the Mediterranean.

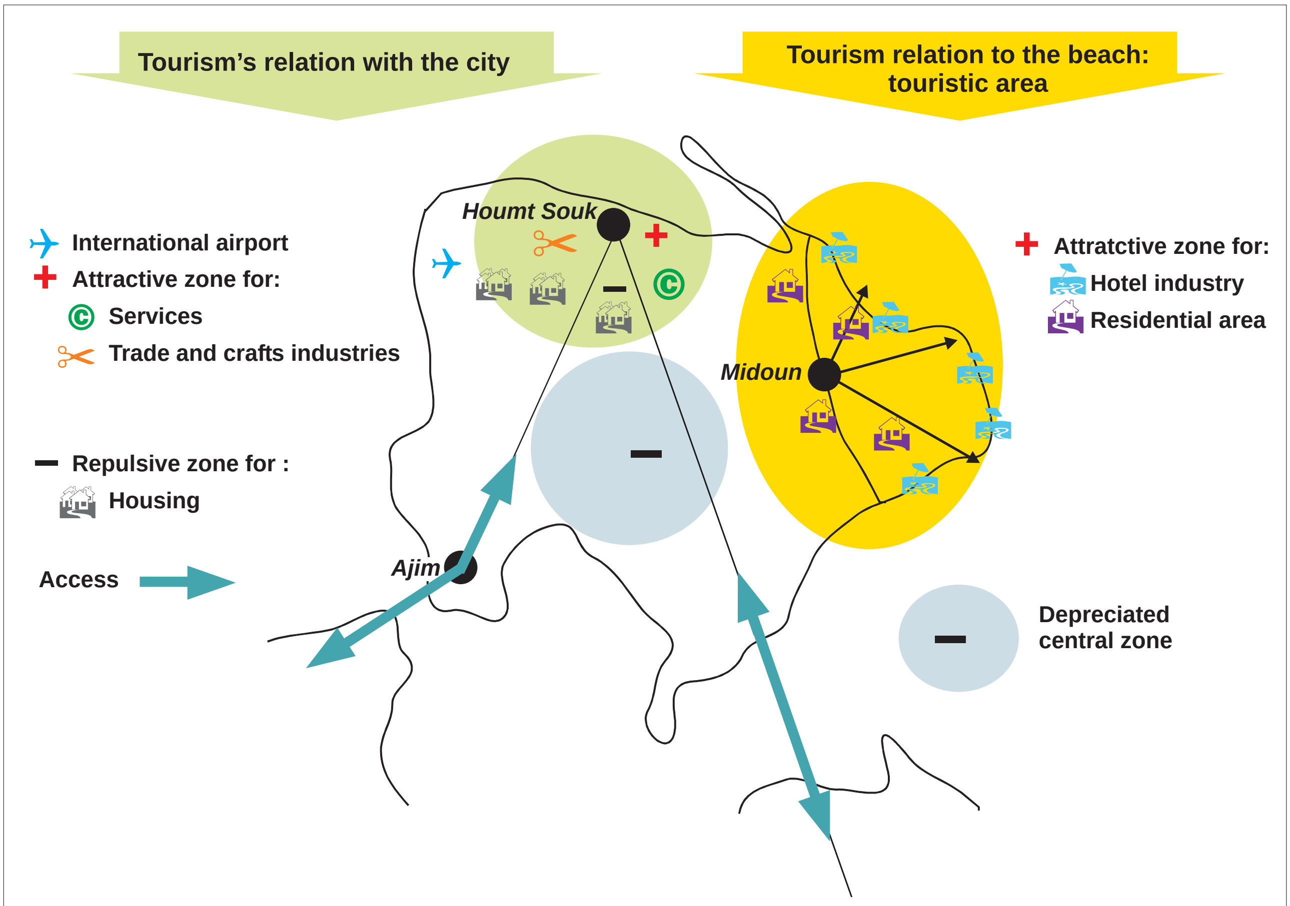
2. **The “territorial / urban planning school” or “French school”** featuring “*plans d’aménagement”* and direct State intervention in establishing rules (e.g. number of beds per km^2) as a common practice. Similar situations are observed in the three Maghreb countries, in particular in Morocco and Tunisia. From the 1960s, after their independence, general development plans were established and central government made commitments to construct tourist infrastructure, under specific Tourism Development Plans in order to increase tourist numbers, currency inflows, income and employment. As highlighted by the data on supply and demand, the process of tourism development came to a halt in Algeria[26] during the 1990s for political reasons, but not in Morocco and Tunisia. Nevertheless, although the tourism development stopped in Algeria during the 1990s, the spatial planning process did not.

In Djerba[27], only investments located within the dedicated “tourist zone” (established in 1973) were eligible for State aid (Chapoutot, 2011). The “*plan d’aménagement touristique*” focusing particularly on the “tourist zone” covers less than 4% of the island of Djerba and 21.5% of its shoreline. The “*plan d’aménagement*” provided space for different uses such as hotels, entertainment facilities, residential property, other amenities, green public spaces and non-constructible areas. Within these areas, the density of hotel beds and the height of the buildings were also determined, even if this was reviewed later on.

26 Recently there has been a new process of territorial planning for tourism development in Algeria in order to “boost” tourism activity.

27 1,245 beds in 1968, 45,310 beds in 2008, almost 20% of Tunisian capacity.

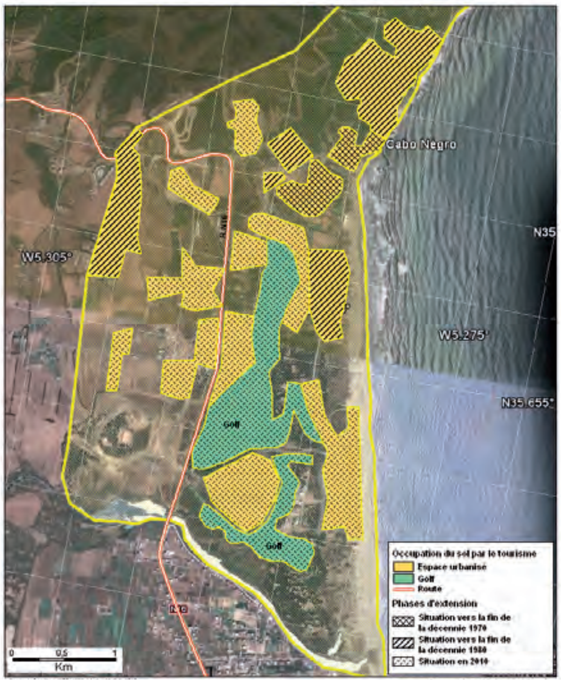
Figure 22 Transformation of tourist territory (Djerba, Tunisia)



Source: Djerba case study, Chapoutot 2011.

Figure 23 Land use changes in the Tetouan coastal area (Morocco)

Development of built up area along the Martil coastline - Cabo Negro



Development of built up area along the Kabila coastline - Rio Negro

Source: Case study of the Tetouan coastal area, Berriane 2011.

In the Tetouan coastal area, a location initially designated for international tourists (in the 1960s) is now mainly focused on domestic holidaymakers, through big real estate operations occupying almost all the coastal strip, resulting in linear urbanisation and “artificialisation” (*Figure 23*). Territories previously seen as protected areas have ended up becoming urbanised, despite different schemes drawn up for their protection. Only 12.5% of the coastal strip is not built up now and the occupied area represents between 28 and 41.5% of the total surface area.

There has been a progressive disengagement of the State from direct investments in the Tetouan coastal zone over the last few years. Even though the regulations and restrictions imposed within the tourism area aim for lower concentration and better location and shape of buildings (but high land use), the pressure for individual homes has led to diffuse and anarchic construction in the hinterland close to the tourist zone. Since new functions of the territory are prevailing, the original settlements and the whole area have profoundly changed; urban sprawl and tourism industry have been responsible for the loss of remarkable wetlands.

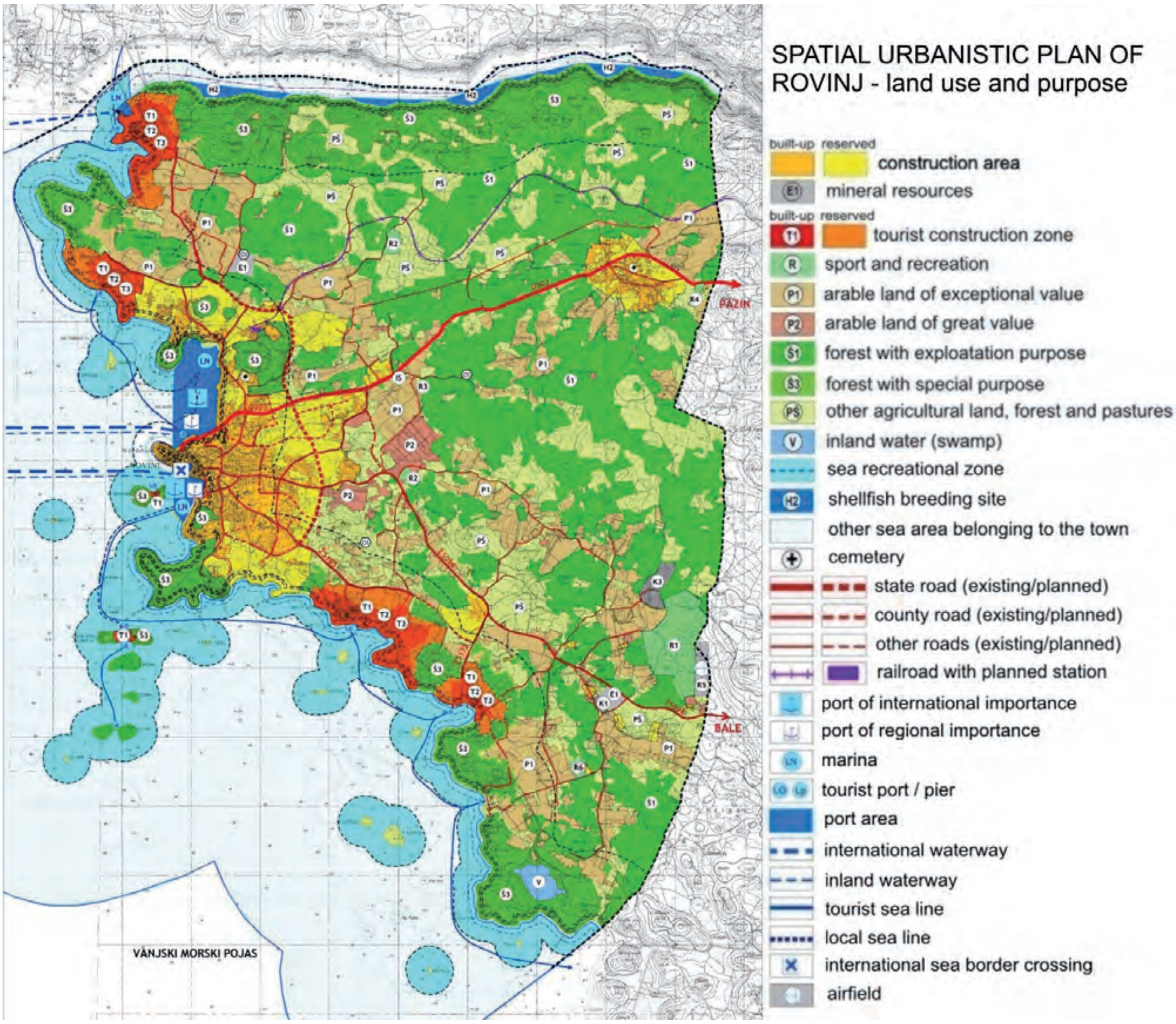
3. **The “conservation/protection school”**, featuring more restrictive plans, because the priority is given to the conservation of the natural or/and cultural resources (e.g. Cabras, Castelsardo, Rovinj and Siwa Oasis).

In Rovinj, tourist areas are spread around the town, leaving the traditional settlement fairly intact. In the oldest of the destinations studied, the conservation of the built and the natural environment arises from a combination of different historical reasons:

- The strict planning and control system in the communist period;
- The fall in tourist numbers during the war, and the bureaucratic post-war system which is unattractive for big foreign investors;
- The fact that the local government, which owns the majority of the resources currently (since 1993) has a policy against “*apartmanization*” (construction of residential apartment blocks by real estate developers) and in favour of new hotels; and finally,
- The presence of a successful local company, which is the driving force behind almost every development process.

The decisions of the Autonomous region of Sardinia to forbid construction near the coastline, the adoption of a plan for sustainable tourism in combination with national protection measures

Figure 24 Location of tourist zones and town areas in Istria County (Croatia)



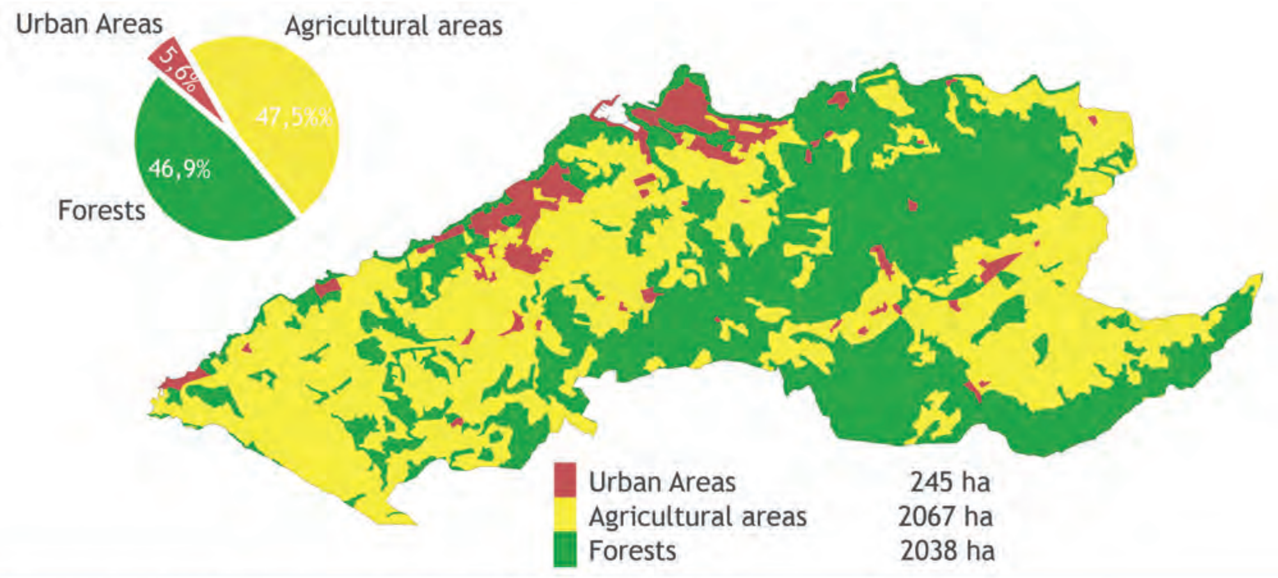
Source: Rovinj case study, Klaric 2011

for historical sites such as Castelsardo (*Figure 25*) and natural sites such as Cabras (MPA), and general measures for environmental protection and Integrated Coastal Zone Management (ICZM) have resulted in the preservation of these destinations, unlike the situation on the eastern coast (Costa Smeralda) which was built up during the period before these restrictive measures.

As an important protected cultural site that is not on the coast, Siwa Oasis is under even less pressure and very severe controls apply to construction in order to not alter its physiognomy (*Figure 26*). However, the success of the destination could increase the pressure for further “development”, as usually happens; so a strict plan for territorial development is needed in order to protect its natural and cultural assets.

The development of tourism has been used in all the destinations as an opportunity to improve general and specific infrastructure (transport, water and energy supply, wastewater treatment) in order to make the destinations attractive for investors and tourists. These infrastructure projects may not have been constructed without the (additional) tourism demand and the expectations of additional income, employment and taxes. Nevertheless, in some destinations tourism demand has caused existing infrastructure to become saturated and it has become necessary to build new infrastructure in order to maintain the level of supply of services to locals and visitors. In some destinations the new infrastructure is not sufficient to sustain the additional demand, which creates socio-economic and environmental problems (due to “mono-activity”, scarcity or shortage of water

Figure 25 Land use in Castelsardo (Sardinia, Italy)



Source: Castelsardo case study, Satta 2011.

Figure 26 "New Hotel" in Siwa Oasis

Source: (IDSC) Matrouh Governorate

and land, etc.), undermining the sustainability of the destinations. The under-use of infrastructure in low season should also be mentioned here.

Tourism is also supposed to create economies of scale for a broader (diversified) sustainable development through new infrastructures, new demand for services and goods, an improvement in the skill levels of the local population, and increased capital for new investments within the destinations. This goal is generally not achieved as the destinations have rarely developed other activities besides those services directly linked to tourism. A slight exception can be observed in the destinations "with character", where tourism has not became a "mono-activity". Quality local produce such as fish, olive oil and wine have done well out of the development of tourism in Sardinian destinations (Cabras and Castelsardo), as have services and activities related to the promotion of the natural and cultural capital.

Different approaches to the governance of tourism

In the majority of SEMCs (Algeria, Egypt, Morocco, Tunisia and Turkey), central government has almost all powers and all decisions are taken using "traditional government practices". On the other hand, in Spain and Italy, countries where regional and local authorities have high level of autonomy and decision-making power, decisions are taken mostly by autonomous decentralised authorities within the national framework. Croatia had a particular history with the Former Yugoslavian Republic, and recent developments have given the nation's counties significant powers.

In Torremolinos, there are five levels of decision-making bodies involved in planning and tourism management, from the local to national level. In 1992 Torremolinos was selected to be part of a pilot project under the framework plan for Spanish Tourism Competitiveness. A long-term plan was drawn up (the first for Andalusia which is a mature destination) with the participation of regional and local authorities, featuring seven strategic action lines[28] and a budget

28 The plan provides for the revitalisation of tourism centres and areas with the improvement of urban environments; improvement of the environmental quality of the destination (land and energy management); modernisation of tourism businesses and products; product diversification and differentiation; innovation and new technologies; employment

of €335.5 M (under implementation). One of the flagship projects is the intervention in the shoreline and beaches in order to ensure better accessibility, improved environmental quality (beach and bathing water quality, and protection of flora), regeneration of river channels, improvement of public facilities, and the creation of a waterfront observation point. The main objective of the Marketing Plan of the Tourism Board of Malaga (the Province which Torremolinos is part of) is to strength the cooperation between public bodies and professionals. It has instituted a Competitive Intelligence and Quality Management programme to reduce seasonality by developing specific products, to create a destination brand based on quality, authenticity and diversity, and to use new types of online marketing. Other policies such as the General Urban Plan are also relevant to the destination. However the latest plan for Torremolinos, which initially envisaged a population increase to 120,000 people through intensified urbanisation, was rejected by the competent regional and national authorities; this gives an idea of what sustainability may mean for local authorities in reality: real estate seems to be the main driving force for any new development.

In Sardinia, the tourism development and promotion plan is a result of collaboration between the regional and local authorities and other bodies from the private and associative sector. In Cabras, the MPA and Municipal Council have initiated a governance tool in order to draw local public and private organisations into a sustainable tourist management process. This entails the use of a participative development process to define an all-round tourist product, resulting from interaction between institutional, socio-economical and productive fields and the tourist sector, creating interconnected systems within the provincial, regional and Mediterranean contexts. The strategy focuses on the preservation and re-evaluation of the identity and the hospitality of Cabras community, alongside development of the most attractive components of the territory: nature, archaeology and history, culture and folklore, local craftsmanship and gastronomy. More than merely a tourism development strategy, it really is an integrated territorial development plan.

In Rovinj, the main reason behind the sustainable policies is the fact that the majority of resources in the area are under local control and that local companies have been economically successful. It is also significant that Istria County has in general conducted a relatively independent economic policy, because of the political stability at the local level since 1993.

and training qualifications; and a communication and management plan.

Figure 27 Pictures of "protected areas" (Rovinj, Croatia)

Source: Istria regional tourist board. http://www.istra.hr/en/regions_and_towns/town_and_cities/ltz_rovinj/about_rovinj

It seems that the different planning practices have had varying results in the destinations, influenced by the specific national context, policies and practices. Local diversity and assets, as well the Mediterranean image, would however appear to be better protected through a more strict planning process.

Policies for improving the results and performance of tourism towards sustainable development

The following paragraphs look at local authority or business policies undertaken to improve economic, social and environmental results. These policies are either initiated by the national or local authorities, as they generally have a viewpoint about the goals to be achieved at national and regional level, and because the majority of tourism businesses are small and medium companies that cannot drive major innovations without external inducement, or by big companies looking to improve their results and public image. Policies may be classified as follows:

- **Quality programmes.** These initiatives include programmes where companies voluntarily improve their facilities and services in order to offer a better product to consumers, in line with specifications laid down either by authorities or by private companies, generally leading to the award of certification or a "label". This category could also include actions to improve the quality of the destinations, such as the "*Plan Qualifica*" for the Western Costa del Sol (Spain), which includes among other measures funding for the modernisation of tourism businesses (but also energy saving measures and the use of renewable energy). This initiative is based on the distribution of grants, generally without any obligation to satisfy a quality scheme, and it is not a voluntary process of self-improvement.

- **Environmental quality programmes such as eco-labels for accommodation services or other environmental management schemes**. Even though in some cases national and local authorities have initiated measures to improve energy efficiency, use of renewable energies, water management, the experts did not report any cases where explicit programmes have been established in the destinations by the local authorities. Very few companies are following broader quality programmes: just one hotel in Tipaza (the Corne d’Or) and one in Torremolinos are mentioned. In Morocco, there are different schemes such as the “Blue Flag”, “*Clé Verte*”, code of energy efficiency, and vignette for water economy.
- **Training programmes for entrepreneurs and employees**. Although it is widely reported that the education level of employees is not high, there is very few references to training programmes; efforts seem to be focused solely on basic education. In Torremolinos, the “*Plan Qualifica*” has earmarked 7.6% of its budget for the enhancement of employment skills with extensive training programmes, and 1.2% for innovation and new technologies in order to foster a new entrepreneurial culture with continuous innovation, lifelong learning, and human resources training. In Morocco, some training programmes are reported but it would appear that the impact on the area studied is fairly insignificant, since second homes are the main accommodation structure.
- **Diversification of the offer to promote local “image” and local products**. This type of initiative is mainly undertaken by public authorities to attract more and “better”[29] tourists to mature destinations, in order to counterbalance declining occupancy rates, increasing seasonality, and falling revenues for tourist enterprises. In Torremolinos, this strategy focuses on “marketing campaigns for specific segments with high purchasing power (gay tourism, fairs and congresses), by product type (sports and social) or complementary activities to meet the demand (mainly cultural events)” (Navarro Jurado, 2011). Substantial efforts have also been made recently to attract Spanish tourists in order to overcome the falling numbers of British visitors, but with lower economic benefit. This effort, alongside an effort to improve the quality of the offer by increasing the proportion of upper class hotels, has had limited success because the “diversification” (*rejuvenation* according to Butler) is still too tied in with the main “sun and beach” product of the area and has not generated a genuinely different tourist product. This seems to be the case in all the “3S destinations” studied in the project: the creation of golf courses in El Alamein, Djerba, and the Tetouan coastal zone, the creation of cultural attractions and congress centres in almost all the destinations has not transformed the product offered from a “global 3S” offer. It is difficult to transform a destination in order to offer a totally different product, since the “classic 3S product” has left its mark through land use changes and buildings, but also in the mentalities, economic structures and image.

However it would seem to be possible to diversify the product away from a 3S offer when the main characteristics (natural, cultural, architectural) of a destination are preserved during the early phases of its development. Unfortunately, this is not the case in almost all the 3S destinations around the Mediterranean. A genuine diversification, based on the exploitation of local resources is seen only in the destinations with a distinctive character. As mentioned above, the municipality of Cabras, the MPA, and the local population have collaborated to offer an “added-value product” based on unique local natural and cultural assets. In Rovinj, despite a significant expansion in accommodation many years ago, the character of the town and its surroundings (natural areas) are well preserved. The development of tourism in Siwa Oasis and Castelsardo seems to be driven by a similar rationale.

This analysis underlines two different and highly important topics regarding the sustainability of tourism:

- The first issue is the operation of the private sector, whose role is to develop “sustainable/long-lived enterprises” within a sustainable socio-economic and environmental context. It seems that the private sector is not aware of the problems and challenges of sustainable tourism and the ways to achieve these goals. Short term profit-making through cost cutting and the “outsourcing” of private costs to society and the environment are a common approach. A few companies have realised that environmental protection or energy efficiency measures could also result in reduced costs and better profits, as well as improving their image with at least some categories of consumers.
- The second issue is about the public authorities and the use of development tools to achieve their goals. They have often used “traditional” mechanisms (such as incentive policies) to attract investors and tourists by developing “typical” 3S destinations, without any respect for their local specificities. Even if a more sustainable future may be possible through various policy and institutional adjustments, and measures to improve the economic, social and environmental performance of companies and destinations, genuine diversification of the destinations seems to be difficult if it is not planned very early on. The authorities need to assess the various direct economic, social and environmental costs and re-direct tourism development towards better results. Continuous expansion of the accommodation offer can no longer be accepted as an obvious and efficient strategy, especially when a destination seems to be in mature phase or in decline.

29 Generally, “better” tourists are assumed to be those who spend more money…

Policies for improving the impact of tourism on the destination’s sustainability by better integration of development strategies

As stated in the methodology section (Part I), the contribution of tourism towards achieving a more sustainable destination is about achieving a more diversified, resilient and effective economy with high multiplier effects (and consequently low economic leakages), a more equitable society (better wealth distribution), and an environment that can continue to offer goods and services in long term. In line with Agenda 21 recommendations, this could be achieved through better integration of tourism in local development strategies.

The experts explicitly or implicitly report very few governmental initiatives that seem to have tried to achieve this integration. In most of the cases studied, the “non-integration” of tourism with the rest of the territory is obvious, with a clear aim of tailoring the “tourist area” to the international market.

- In Alanya, Djerba, El Alamein, Marsa Matrouh and Torremolinos, this “disconnect” is total and nothing seems to be done to reverse the trend. It can even be asked whether or not a shift is still possible through the “rejuvenation” of the destination or through changes within the local economy in order to provide goods and services to supply direct and indirect tourist demand.
- Efforts are being made to achieve such integration in the Tetouan and Tipaza coastal areas, however the main product is still unchanged. In Tipaza, proposals have been made to create cultural, natural and historic circuits for tourists, covering not only the beaches of the destination, but also the nearby mountains and archaeological sites using alternative “transport” methods such as hiking and biking. In Tetouan region, there are some initiatives to integrate the rural area of Chefchaouen with the tourist product offered in the coastal area, or to attract directly tourists for the “specific” product offered by rural villages, based around the local culture.
- In the destinations with a distinctive product, developments seem to be more positive. In Rovinj, tourism is more integrated in the town and its cultural activities. In Siwa Oasis, the distinctive landscape is the main attraction. In Castelsardo, the main attraction is the historical and cultural heritage. Cabras seems to be the best example where tourism is integrated with the rest of the economy: development of the MPA and natural assets in general. The small scale of the tourism activity is an advantage as well as a problem: very short season, low tourist employment and low income even though daily expenditure is high.

The following comments can be made about the environmental impact of tourism development through policy implementation:

- An ambitious but rather ineffective legal framework for the protection of the coastal zone exists in all the countries, with low levels of implementation everywhere.
- There are regional plans for environmental protection, Carrying Capacity Assessment (CCA), Water Protection Plans, etc., but there are more “plans” than implemented and effective policies.
- In some destinations (Cabras, Castelsardo, Rovinj, and Siwa Oasis), the management of natural and cultural protected areas appears to have been and to be effective.

Figure 28 Protected Marine Area in Cabras (Italy)

Source: Case study, Satta 2011.

- Local initiatives to implement integrated strategies, such as Local Agenda 21, application of regional strategies, monitoring systems using participative approaches and recycling practices, are rather rare; they are only explicitly mentioned in Cabras.

Even though the data available is insufficient to provide a complete overview and assessment of policies for the integration of tourism with other territorial policies, it is clear that the destinations with a distinctive product based on their territorial specificities have a higher degree of success, meaning that they will have possible ways for adapting to the principles of sustainable development. In contrast, the low impact of qualitative changes in the local economy (mainly due to high levels of leakages) and the environmental damage caused (mainly through exceeding the carrying capacity of the area) is a common concern, mainly in the 3S destinations. In the long term, this will undermine the positive results with regard to GDP and employment creation. It seems less likely that these destinations will be able to develop mitigation strategies to deal with new challenges: climate change, differentiated demand, preservation and promotion of local characteristics, etc.

Overview of experts' policy recommendations

The experts' recommendations based on the case studies outputs generally depend on the specific situation of each destination. They can be classified as follows:

- **Enforcement and implementation of legal instruments (legislation, rules, regulations, licensing, sanctions), and improvement of their effectiveness**

  These recommendations are chiefly relevant to the preliminary phase of the development of private and public projects, since land use changes from new constructions are irreversible and can cause incalculable damage to the environment and its delicate equilibrium. In addition, the economic and social "damages" can be also too high with respect to the sustainability of the area.

- **Development and promotion of market-based instruments (e.g. taxes, incentives) and voluntary schemes for tourist companies**

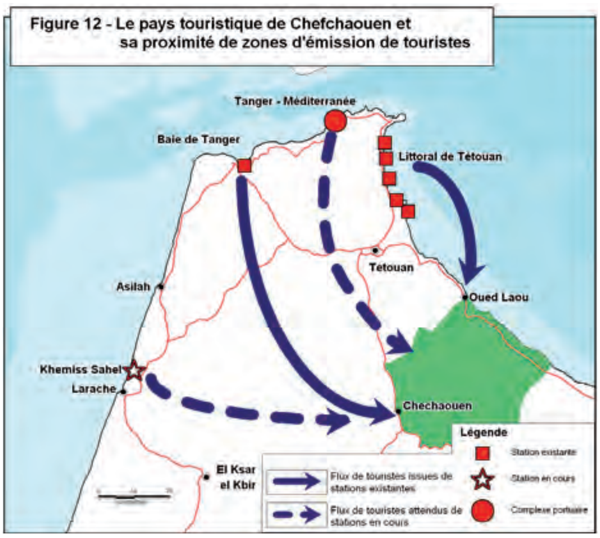
  Over the last two decades a range of "alternative" policy measures have been developed to supplement and enforce legal measures that seem inefficient and expensive, such as taxes to influence market prices, promotion of financial support for best practices, industry self-monitoring, codes of conduct schemes.

- **Environmental awareness-raising campaigns for tourists, entrepreneurs and employees (internal and external stakeholders)**
  - Develop information and education programmes in cooperation with local stakeholders ensuring the involvement of all players;
  - Provide information to tourists on appropriate behaviour (sensitivity, respect for and adaptation to local culture) by establishing information centres in each destination;
  - Provide information to the local community on the opportunities and risks from tourism and on how to influence tourist behaviour.

- **Recommendations for investors and tour operators for a more responsible behaviour towards destinations**

  External stakeholders (investors and TOs more than tourists) influence the development of destinations and in many cases, their economic and political power is higher than that of the local authorities. Their ability to drive the flows

Figure 29 "Images" illustrating policies to diversify the 3S tourist product in the Tetouan coastal area (Morocco)



Source: Case study of the Tetouan coastal area, Berriane 2011.

of finance and tourists around the globe puts governments and other authorities under pressure to soften requirements and protection rules in order to promote more “development” (and more money). Competition between destinations and countries also works in their favour.

- **Integration of the hinterland to shift away from the 3S product or diversify it through the introduction of new and additional products (notably natural and cultural heritage): decreasing economic leakages by “territorial development” vs. “functional integration and resilience for tourism development”**

  As mentioned earlier, there is a trend in some destinations (especially the Tetouan and Tipaza coastal areas) to develop and promote new products that draw in the hinterland for green and cultural tourism: hiking, agritourism, ecotourism, etc. This seems possible in the Tetouan hinterland with the development of Chefchaouen (mountain zone), through the mobilisation of local players to provide accommodation, catering, guiding services, etc. As the visitor numbers are increasing (both domestic and international tourists, individuals and groups), the State decided in 2003 to create a tourist zone to bring any further development under a certain level of control. In destinations with distinctive products, these goals are more likely to be achieved as greater efforts are made towards integration.

  Generally speaking, the goals of territorial development (local integration of tourism activity) versus the functional integration of tourism development to the global system (more by the maximization of profits at the firm level –national and international stakeholders– than a long term strategy linked to territorial goals) takes into account the local needs and can have more sustainable results for the destinations.

- **Decentralization vs. Central Planning: fostering local governance for a better integration of tourism**

  Territorial governance must be better adapted to local realities in order to be more effective. Centralised and bureaucratic schemes based on administrative units are not always appropriate for tourism destinations. The local/territorial governance could be improved for a more effective integration of tourism within the local economy, through different but complementary strategies such as:

  — “Developing commercial strategies for territorial marketing and supporting professionalization of the industry in emerging destinations” to underscore the value of their historical, cultural and/or environmental heritage. Businesses are also advised to make greater use of the environment in their marketing strategies, while avoiding projects in which the environment may appear to be an “alibi”.

  — “Consuming locally and prioritising short channels of distribution” for procurement and replenishment in the destinations. There is a degree of compatibility between the environmental and socio-economic issues (they may converge). In parallel to the commercial operation of tourism in a given destination, local producers can no longer keep up with a level of demand that exceeds the offer. That is why support must be provided to local producers to meet the demands of tourist establishments, just as tourists must be encouraged to consume local produce. This “territorial wake-up call” involves three actions: (i) helping local producers meet tourist demands, (ii) raising the awareness of tourists regarding the need to consume local produce, and (iii) convincing hotel operators to adopt these virtuous practices.

  — “Encouraging local hotel operators to deposit their revenue in national banks to limit economic leakages”.

  — “Promoting the involvement of the voluntary sector and civil society in the definition of “labels” or certification processes for destinations”.

  Regarding the “centralisation versus decentralisation” of policies and public initiatives, the experts explain that decisions taken by national governments to bring tourism to peripheral areas have, in some cases, led to sudden transformations in local communities (and their eviction). This is a social justice issue. In certain territories in SEMCs where there is still room for improvement as far as educating local populations is concerned, both the local inhabitants and certain decision makers are not sufficiently competent in drawing up land use management plans. The Southern Mediterranean’s younger States have a limited experience in democracy and its practices. In these contexts, rapid mainstream decentralisation could result in a worrying return to regionalism and localism.

- **“Image”, “label”: need for certification of sustainable Mediterranean tourism**

  The main objective of a “label” is to improve the quality of services in a tourist destination and its visibility at the global market scale. The development and implementation of a “label” should encourage local tourism players to improve the quality and diversify their services and activities according to sustainable development principles. Certification should not be confused with regulations, which also aim to achieve quality standards (i.e. “stars” for hotels). This should be supported by a promotion through a targeted communication policy. Instead of general brochures, country guides should be developed, emphasising diversity, but also connections that once existed between the coast and its hinterland.

- **Monitoring system**

  The creation of local and/or Mediterranean monitoring systems to permanently control the performance and impact of tourism on sustainable development within the destinations and the region would be a relevant tool, providing useful information for policy recommendations at the local, national and Mediterranean level.

Creating a Mediterranean observatory and a “quality label” for tourism sustainability?

One of the main goals of the MSSD is to promote sustainable tourism through: reducing the adverse territorial and environmental impacts of tourism; promoting sustainable tourism facilities and offers, and increasing the added value of tourism for local communities; improving governance for sustainable tourism.

Sustainable development in the Mediterranean requires not only a better tourism policy. Other policies can be concerned on issues such as: the promotion of sustainable agriculture and rural development; the adaptation of its craft activities and industrial production; the enhancement of unique cultural sites and heritage; the preservation of valuable landscapes, natural resources, biodiversity and ecosystems for the provision of environmental goods and services to local communities, tourists and the world; the safeguarding of the quality of life for the increasing population in urban and coastal areas; combating social exclusion; the respect of cultural diversity; the reduction of parameters driving climate change and the mitigation of its impact on coastal areas.

This goal can be achieved by: better territorial planning; better operation of companies; better integration of tourism into local and national development strategies.

If the above recommendations could be implemented in the destination by “internal” stakeholders, the “external” stakeholders (tourists, investors, TOs) would have to adopt a more responsible attitude towards territories and their population. It is useful here to refer back to the tourism system diagram (*Figure 1*), and to recall that the development of tourism activities and the emergence of a destination depend on a “convergence of interests” between national and local authorities and private operators/investors (TOs, accommodation establishments, and transport companies, particularly airlines).

Preliminary principles for recommendations to stakeholders: towards a “quality label” for Mediterranean tourism?

The principles emanating from the case studies on which a “cahier des charges” or “certification process” on sustainable tourism could be based are as follows:

- To develop a diversified **offer** based on:
  - drawing on territorial/local economic, social, cultural and environmental specificities to produce a high-quality (not necessarily luxury) tourism product, and
  - authentic and high added value tourist services (other than HORECA) that incorporate innovations and skilled labour, and respect the carrying capacity of the destinations (scale of the activity);
- To attract tourists (**demand**) from the global market, who want to discover the different locally specific “products” that Mediterranean destinations have to offer;
- To promote the distinctive locally specific “brands” of the different destinations under the overall umbrella “Brand” of the “Mediterranean Destination of Excellence”, rich and famous not only because of its glorious past but also for what it is today (*territorial marketing*).

Development of guidelines adapted to each kind of stakeholders

As a follow up to the development of a “cahier des charges” based on the sustainable development principles, guidelines will have to be developed for the main internal and external stakeholders, namely tourism companies, local authorities, investors, and tourists. Examples of the possible substance of these guidelines are listed below:

- **For companies.** The concept of a **“responsible business”** could be promoted, in terms of:
  - **Economic viability of the company**. The owner or manager of the company has to be aware of developments in the internal and external environment affecting the company, through various indicators and benchmarking processes, in order to be able to make the necessary adjustments to ensure long term competitiveness.
  - **Customer satisfaction**. According to most surveys, about 50% of new tourists to a destination have been informed about it by previous satisfied clients: i.e. friends, family, social networks, etc. This highlights the fact that most effective form of publicity for a tourist destination and a particular service (i.e. hotel, bar, restaurant) is a satisfied customer.

This is why every company has to do its utmost to satisfy its own clients for the benefit of the company and the destination. Companies should evaluate customer satisfaction through means such as questionnaires and to pay constant attention to the way the company operates.

— **Employee satisfaction**. Company performance depends on their employees, and these employees have to be satisfied with their working conditions and income in order to give their best. Temporary, non-declared, unskilled workers may be cheaper to hire, but are likely to be less productive and to deliver low quality of service and low customer satisfaction.

— **Use and promotion of local products and services** through local networking can help to reinforce the local economy, reduce economic leakages and diversify the tourism product to enable it to acquire unique features and a distinctive place in the market. Since monopolistic competition is often found in tourism activity, the unique characteristics of every destination can be used to diversify the tourism product.

— **Protection of the environment**. Company owners must be aware of the risk to a destination in the event of unsustainable use of resources leading to the inability of the environment to offer ecosystem services. Consequently they should use local resources with precaution and continuously work to improve their company’s performance.

Companies need to establish internal monitoring systems to permanently check on their performance, and to intervene directly to improve the sustainability of the company within a sustainable tourism destination. A quality scheme could be proposed for Mediterranean companies, based on the indicators presented page 59 (companies’ radar). Best practices should also be promoted through appropriate publicity and funding from investment groups sensitive to sustainability.

- **For local authorities.** “**Quality Mediterranean Destination**” and “**Mediterranean Destination of Excellence / MED-EDEN**[30]**”** schemes could be promoted, based on the sustainable exploitation of its natural and cultural capital through the use of skilled human capital for the production of high-quality “branded” services (tourism products).

As one of the MSSD’s recommendations is to promote a different image of the Mediterranean, the equivalent of EDEN (European Destination of Excellence) could be launched for the Mediterranean (MED-EDEN), based on the development of local resources in parallel with good scores for economic, social, and environmental performance. The involvement of financial institutions to promote “Destinations of Excellence” or plans having an “excellent label” could be examined.

A monitoring system could also be established by destinations so they can gauge changes in tourism supply and demand, how its results compare with other competitive destinations, and the impact it is having. Since there are a multitude of active local players in a destination but with different goals (not always compatible), the presence of a “the facilitator of the Charter development/*honest broker*” could help to ensure collaboration and achieve the best possible results.

- **For tourists.** The “**Mediterranean Passport**” could be promoted for active tourists looking to discover a destination’s characteristics, and interested in the welfare of the local community and the preservation of the environment. It might include themes such as:

— Planning a trip: choosing a destination, packing, learning about the destination, ways of travelling, length of stay, etc.

— Arriving into a destination: choosing accommodation, choosing food and beverages, using the resources smartly, disposing wastes, etc.

— Organising a stay: things to do related to the destination, travelling within the destination, discovering the local culture and environment, purchasing local goods and services, etc.

An international campaign through TOs and other distribution systems as well as through national and regional tourism boards could help increase tourists’ awareness.

- **For investors.** As shown in the above analysis, investors seem to be key stakeholders in terms of the sustainability of destinations. As mentioned earlier, significant changes[31] in tourism have resulted on the one hand to a relative “retreat” of traditional hoteliers (owners of establishments) replaced by managers, and on the other hand to the emergence of real estate companies interested chiefly in short term profits through meeting the growing consumer demand for residential

30 EDEN is the acronym for European Destinations of Excellence, a project promoting sustainable tourism development models across the European Union: http://ec.europa.eu/enterprise/sectors/tourism/eden/

31 The changes mentioned here are not only relevant to tourism, but it needs to be placed in the context of wider changes to the economic system.

houses[32]. Consequently, long term sustainable development goals for the destinations are regressing. "**Sustainability assessments**" need to be developed as a tool to evaluate the relevance of new projects and regional plans in terms of sustainability and territorial/destination planning, looking not only at the short-term maximisation of profit but for the long-term welfare of the local society.

Topics that have to be looked at are:

- The location of the investment, since the protection of valuable ecosystems and the cultural assets of the destination have to be considered as a critical parameter;
- The use of local resources, goods and services, offering development opportunities to local companies;
- The use and enhancement of local human capital.

The involvement of financial institutions to promote "Sustainable Investments" or "Sustainable Development Plans"[33] with a high sustainability assessment score could be examined.

Monitoring tool: need for a "Mediterranean Observatory of the Tourism Sustainability"

A monitoring tool is required in order to respond to the different issues presented above and to take into account the difficulties rose by the first application of the method within this project.

In order to obtain an effective tool, there would be a need to define:

- A very short list of basic and mandatory variables and indicators that could be used to create a dashboard or "radar" for the establishment of "responsible business" and another for the establishment of "excellent destination" profiles. This information could then be used for communication with the stakeholders of the enterprise or destination, and this work could form the basis of a Mediterranean Observatory of the Tourism Sustainability.
- Two wider ranges of variables and indicators for use respectively by companies and destinations to establish their own internal monitoring system in order to inform, monitor, control and plan the necessary measures at the different levels (company, destination and region).
- Thresholds for the main variables and indicators, enabling the various enterprises and destinations to evaluate their own performance through benchmarks.

The "companies' and destinations' dashboard or radar" to be used respectively by companies and local authorities could be the following:

1. **The "companies' dashboard or radar"** should be a tool for internal monitoring and improvement to promote sustainable development. It would need to be based on a limited amount of information that every tourist enterprise can easily collect regardless of its size and its legal form. This data could also be used for a "Sustainable Mediterranean Companies' Radar".

   A tentative list of basic variables for this "radar" could be:

   - Economy 1: Nights spent per bed (clients per table, rented days of a bike/car, etc.)
   - Economy 2: Revenue per night spent (or per client)
   - Economy 3: Revenue per bed (or per m^2, per table, per rented car, etc.)
   - Society 1: Employment per bed (or per m^2, per table, per rented car, etc.) – equivalent annual employment
   - Environment 1: Water consumption per night spent (or m^2)
   - Environment 2: Energy consumption per night spent (or m^2)
   - Environment 3: Waste production per night spent (or m^2)
   - Environment 4: Space occupied (per bed, per table, per car, per berth place, etc.)

   A more complete monitoring system would help companies carry out continuous self-checking, either to compare its operations with previous years, or to compare its performance with other similar companies in the same destination or in competing destinations, or for benchmarking purposes.

   It could include tentatively the following complementary information:

   - Operational period
   - Seasonality, and occupancy rate per month
   - Breakdown of tourist nationalities
   - Contract type: individuals, business, travel agency, TO, other

32 Even the demand of residential houses has changed; it is less and less related to the sentimental attachment to a specific place but to the "3S global product". That is why most of these houses are rented to other persons when there are not used by their owners.

33 The investments do not necessarily have to be directed to increasing the offer; they may aim to "rejuvenate" destinations or establishments in order to improve their performances.

- ○ Composition of sales: room, food, beverages, other
- ○ Composition of expenditure: cost of goods and services sold, labour costs, maintenance, energy, management fees, general and administrative expenses, marketing, gross operating profit
- ○ Total employment (in months) – equivalent employment per bed
- ○ Composition of employment (in months) by education level (primary, secondary, school-leaver, professional education / training, university / graduate and post graduate)
- ○ % of permanent employment
- ○ Bed per m^2 of built area (plot), building coefficient
- ○ Consumption of local products (% of total goods purchased)

2. **The "destinations' dashboard or radar"** should be a tool for internal monitoring and improvement by a destination to promote sustainable development. It would need to be based on a limited amount of information that every destination can easily collect regardless of its size. This data could also be used for a "Sustainable Mediterranean Destinations' Radar".

   A tentative list of the basic variables could be:

   - Economy 1: Nights spent per bed
   - Economy 2: Tourism expenditure (direct contribution of tourism GDP) per bed
   - Economy 3: Total contribution of tourism GDP created per bed
   - Society 1: Direct employment per bed – equivalent annual employment
   - Society 2: Total employment per bed – equivalent annual employment
   - Environment 1: Average space occupied by tourists per bed
   - Environment 2: Average water consumption by tourists per bed
   - Environment 3: Average energy consumption by tourists per bed
   - Environment 4: Average waste production by tourists per bed

   A more complete monitoring system would help destinations to compare its operations with previous years, or to compare its performance in comparison to other destinations, or to benchmarks.

   It could include tentatively the following complementary information:

   - ○ Size of tourism area (area where infrastructures and main tourist attractions are concentrated)
   - ○ Size of administrative area
   - ○ Population in tourism area
   - ○ Population in administrative area
   - ○ Number of tourism beds: hotels and similar establishments, secondary accommodation
   - ○ Number of beds in residential homes
   - ○ Number of tourism beds per inhabitant
   - ○ Number of tourism + residential beds per km^2 (tourism area)
   - ○ Expansion of built-up area for tourism (and residential) purposes as a proportion of total expansion of the built-up area
   - ○ Direct income from tourism activity (HORECA)
   - ○ Direct employment in tourism activity (HORECA) (permanent, seasonal)
   - ○ Total GDP generated by tourism activity
   - ○ Total employment created by tourism activity
   - ○ Total water consumed by tourism activity
   - ○ Water consumed per night spent
   - ○ Total water consumed by tourism activity as a % of total water consumption
   - ○ % of treated wastewater
   - ○ % of recycled wastewater
   - ○ Total energy consumed by tourism activity
   - ○ Total energy consumed by tourism activity as a % of total energy consumption
   - ○ Energy consumed per night spent
   - ○ % of energy produced from renewable energy
   - ○ Total solid waste produced by tourism activity
   - ○ Solid waste per night spent
   - ○ Total solid waste produced by tourism activity as a % of total solid waste production
   - ○ % of recycled materials

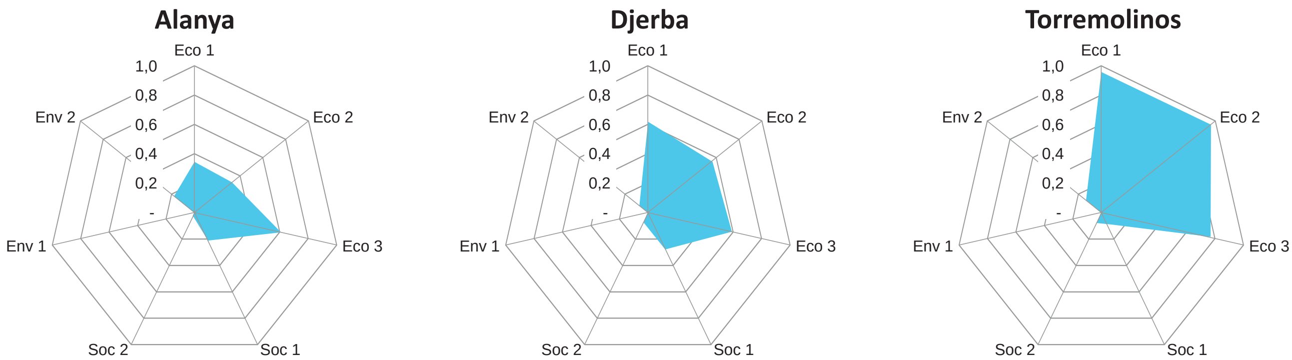
Finally, from the available, similar, and relevant data collected by the experts, the following "radars" have been built as experimental outputs of the project:

Table 9 Destinations studied - Data used for the “radars”

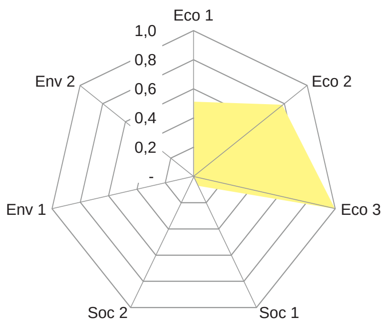
		Turkey	Tunisia	Spain	Egypt	Egypt	Morocco	Algeria	Italy	Italy	Croatia	Egypt
Indicators		Alanya	Djerba	Torremolinos	El Alamein	Marsa Matrouh	Tetouan coastal area	Tipaza	Cabras	Castel Sardo	Rovinj	Siwa
Nights spent per bed	Eco 1	0,345	0,611	0,958	0,511	0,409	0,320	0,163	0,081	0,167	0,392	0,454
Tourism expenditure (direct contribution of tourism GDP) per bed	Eco 2	0,330	0,551	0,955	0,786	0,368	0,391	0,108	0,117	0,247	0,386	0,465
Tourism expenditure (direct contribution of tourism GDP) per capita	Eco 3	0,609	0,577	0,767	1,000	0,587	0,797	0,435	0,947	0,967	0,648	0,761
Direct employment per bed (equivalent annual employment)	Soc 1	0,213	0,267	0,093	0,080	0,120	0,980	0,280	0,127	0,047	0,033	0,293
Total tourism beds/ inhabitant (reversed)	Soc 2	0,025	0,074	0,087	0,008	0,133	0,800	1,000	0,200	0,114	0,015	0,129
Beds (total tourism installation including 20% camping sites)/ tourist area (reversed)	Env 1	0,002	0,003	0,003	0,072	0,077	0,010	0,026	0,898	0,225	0,030	0,437
Average tourist water consumption per bed (reversed)	Env 2	0,178	0,073	0,121			0,113	0,803			0,222	

Source: Data experts, author’s calculations. Destinations classified by type and alphabetic order.

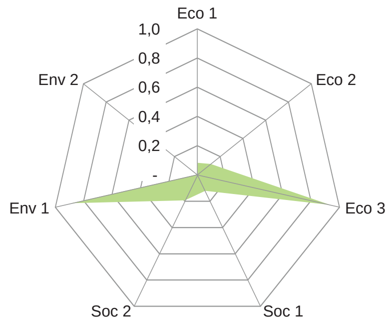
Figure 30 Radars of sustainability - Destinations studied



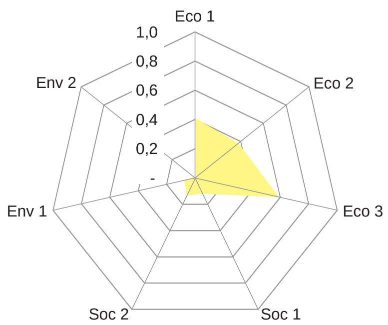
El Alamein



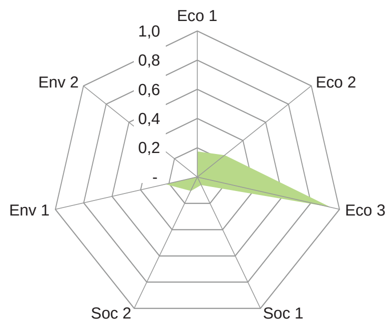
Cabras



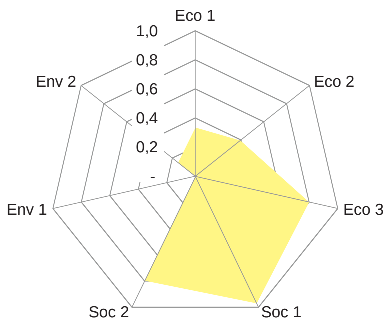
Marsa Matrouh



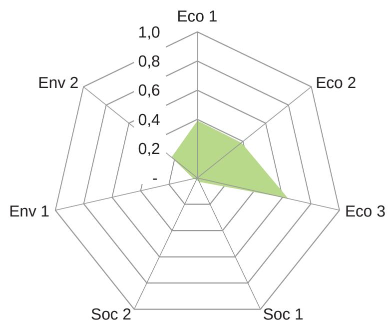
Castelsardo



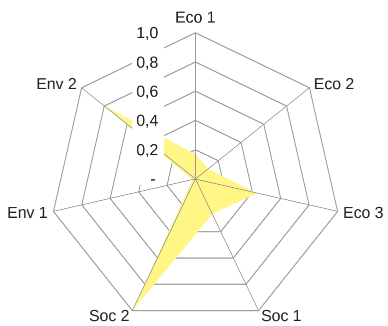
The Tetouan coastal area



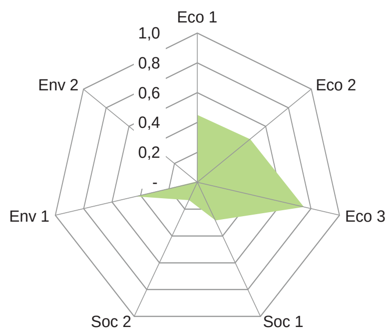
Rovinj



Tipaza



Siwa



Source: Plan Bleu based on data experts and author's calculations.

General conclusion

The objective of the project was (i) to assess the sustainability of tourism in several destinations and (ii) to provide general guidelines for a common tool to monitor and promote sustainable tourism in the Mediterranean, in line with the MSSD recommendations. In order to achieve these goals, an innovative methodological framework has been proposed to help the stakeholders to more clearly define their short and mid-term objectives and to create tools for continuous monitoring and evaluation of the sustainability of tourism.

We firstly proposed an overall framework, the Tourism Sustainability Assessment and Policy Approach, a methodology based on an extended version of the DPSIR approach, with common definitions of sustainable tourism and sustainable destinations. Since the destination is considered to be the basic unit for tourism development, a systemic and territorial approach was adopted, requiring the role of internal and external stakeholders to be identified. Next, a wide range of economic, social and environmental variables and indicators were proposed to measure supply and demand in tourism (tourism as a driving force), the results and performance of tourism (sustainability), and finally the impact of tourism on the destination's sustainability.

As a result of this process, we suggested a classification of the destinations into three groups:

- Alanya, Djerba, Torremolinos, the 3S resorts offering an international (global) product, are mature destinations where many variables indicate a decline of the economic, social and environmental sustainability of the whole host area (economic performance falling, serious environmental problems, problems in attracting tourists, high costs for "rejuvenation" to maintain their attractiveness, and issues of quality of life for residents), following a period of major economic growth that has totally transformed the destinations, their economy, society, environment and landscape.
- El Alamein, Marsa Matrouh, the Tetouan and Tipaza coastal areas, the 3S resorts/towns with a domestic character, are destinations where the predominance of increasing domestic demand has led to a large number of residential homes rather than to the development of the tourism economy, threatening the destination sustainability. This type of offer, dictated more by real estate developers than by a planned tourism development process, has negative impact on the environment without generating clear positive socio-economic results: black economy, low employment, and low impact on the economy in general.
- Cabras, Castelsardo, Rovinj, Siwa Oasis, with a distinctive tourism product and local character. Their common feature is that all of them have promoted their destination based on their cultural and natural assets, rather than on the "sun, sea, sand" mantra. In these destinations, the "place" matters and tourism activity seems to be better integrated into the local economy with high performance, which might be considered as a route towards sustainable development. The main "disadvantage" is the lower socio-economic results compared to other destinations, due to high seasonality.

Within the national and the international context, the various stakeholders have a very significant role in the development and current situation of the destinations:

- National authorities have played a crucial role, mainly in countries with a centralised political system (SEMCs in particular). Their impact on the destinations varies, since the different approaches to planning give different results, even if the main goals (short-term economic results, currency inflow, employment, economic activity, regional development) seem to be the same almost everywhere.
- Tour Operators have initiated, supported and controlled the development of tourism, mainly in the 1st category of destinations, with both positive effects (short-term impacts during development phase) and negative effects (long-term impacts through the standardisation and *massification* of the product). They have put the destinations on the global tourism map, creating demand, low seasonality, high employment and revenue, but also low per capita revenues, high economic leakages, dependence and environmental pressure.
- Real Estate Agencies have gradually replaced both traditional hoteliers and also the local but anarchic investment in residential homes, creating a new situation in most of the 3S destinations, undermining tourism but also the national economy and the environment.

Other players generally have a less important role, although the strengthening of local authorities and the increasing awareness of tourists (and also their transformation from passive consumers to active seekers of “different” and authentic products) will be significant parameters in years to come.

The principles behind the preliminary guidelines proposed are as follows:

- To develop a diversified offer (supply), drawing on territorial/local economic, social, cultural and environmental specificities to produce a high-quality tourism product, and on authentic and high added-value tourist services that incorporate innovations and skilled labour, and respect the carrying capacity of the destinations;
- To attract tourists (demand) from the global market, who want to discover the different and specific “products” that Mediterranean destinations have to offer;
- To promote the distinctive locally specific “brands” of the different destinations under the overall umbrella “Brand” of the “Mediterranean Destination of Excellence”, rich and famous not only because of its glorious past but also for what it is today (territorial marketing).

Finally, it is suggested all players to change their usual practices that lead to the results and impacts analysed above, and to adopt a more sustainable attitude. Examples of possible paths are listed below:

- For the private tourist sector, the principles of “Responsible Business” could be followed in order to improve performance;
- For local authorities, the concept of a “Quality Mediterranean Destination” could be the guide for the necessary improvements (*rejuvenation*) in the destinations;
- For tourists, the “Mediterranean Passport” could improve awareness;
- For investors, the “Sustainability Assessment” could guide their future actions.

In this context, it is suggested Plan Bleu to contribute to:

- Offering recommendations, guidelines, decision-support tools such as sets of indicators and, upon request, technical support to interested bodies (countries, regions, professionals, NGOs, etc.);
- Designing and implementing regional actions to promote sustainable development in the Mediterranean, as well as a different image of Mediterranean tourism, assisted by a “Mediterranean Observatory of the Tourism Sustainability” as a monitoring tool.

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Abbreviations

B&B: bed and breakfast

DPSIR: Driving forces, Pressures, State, Impacts, Responses

EU: European Union

GDP: Gross Domestic Product

HORECA: Hotels, Restaurants, Cafes

ICZM: Integrated Coastal Zone Management

MAP: Mediterranean Action Plan

MSSD: Mediterranean Strategy for Sustainable Development

MPA: Marine Protected Area

NUTS: Nomenclature of Territorial Units for Statistics

OECD: Organisation for Economic Co-operation and Development

3S: Sea, Sand and Sun

SEMC: Southern and Eastern Mediterranean Countries

SWOT: Strengths, Weaknesses, Opportunities, Threats

TO: Tour Operators

UNEP: United Nations Environmental Program

UNWTO: United Nations - World Tourism Organization

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