



## ***Monitoring and Evaluation of the European Strategy of Adriatic-Ionian Region (EUSAIR)***

### ***Pillar 4 „Sustainable Tourism“ State of the play***

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# OUR TASK - Monitoring and evaluation

- **Consortium partners:** Institute for Development and International Relation – IRMO and Ecorys Ltd.
- **3 main tasks:**
  - **Task T 3.1:** Building the Knowledge Base relevant for Pillar 4 „Sustainable Tourism“ - **new documents analyzed , new Projects have been listed and analyzed**
  - **Task T 3.2:** Establishing the EUSAIR Monitoring and Evaluation Framework – **3rd 4th Pillar EUSAIR Annual Monitoring Report, 2021 in April 2022**
  - **Task T 3.3:** Capacity building for public authorities - **organization of 1 national event in Jezerčica 11/2021 and another one to be held in Plitvice Lakes National park 11/2022**

## Task T 3.2: Establishing the EUSAIR Monitoring and Evaluation Framework (3 monitoring reports covering time line from 2017-2021)

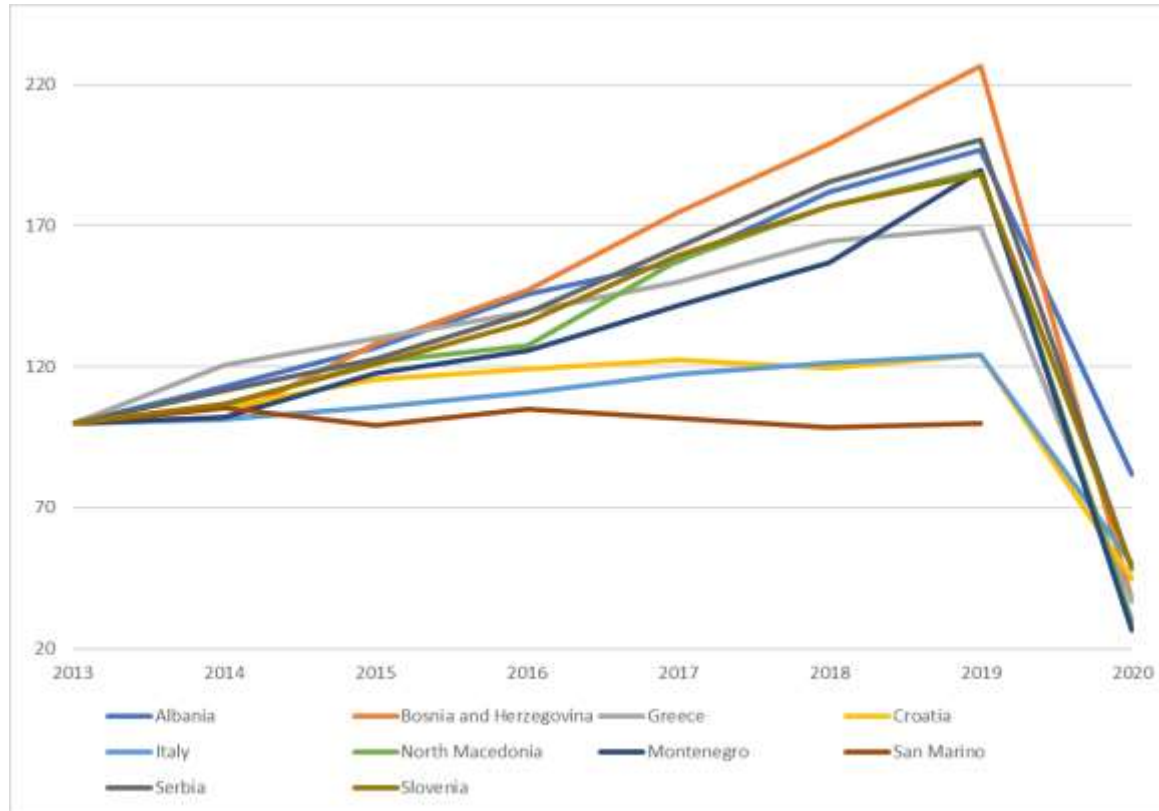
- **Databases and portals** – 6 identified – Virtual Tourism Observatory, ETIS dataset, European Projects Database, UNWTO, World Data Atlas and Tourism 2030 – a tourism portal.
- **MRS.ESPON** – three indicators regarding Sustainable tourism
- **30 suggested indicators:**
  - 8 related to general socio-economic indicators,
  - 19 sustainable tourism (thematic specific) indicators,
  - 3 cross-pillar indicators.

# Socio-economic indicators

- **Population on January 1** – a decline in population in the time period from 2017 till 2021
- **GDP per capita** – growth
- **Employment rate** – slight decline in 2020, recovery in 2021
- **Unemployment rate** – increase in 2020/2021
- **Youth unemployment rate** – increase in 2020/2021
- **People at risk of poverty or social exclusion** – rising in the period 2017-2019
- **Human Development Index** – rising in the period 2017-2019

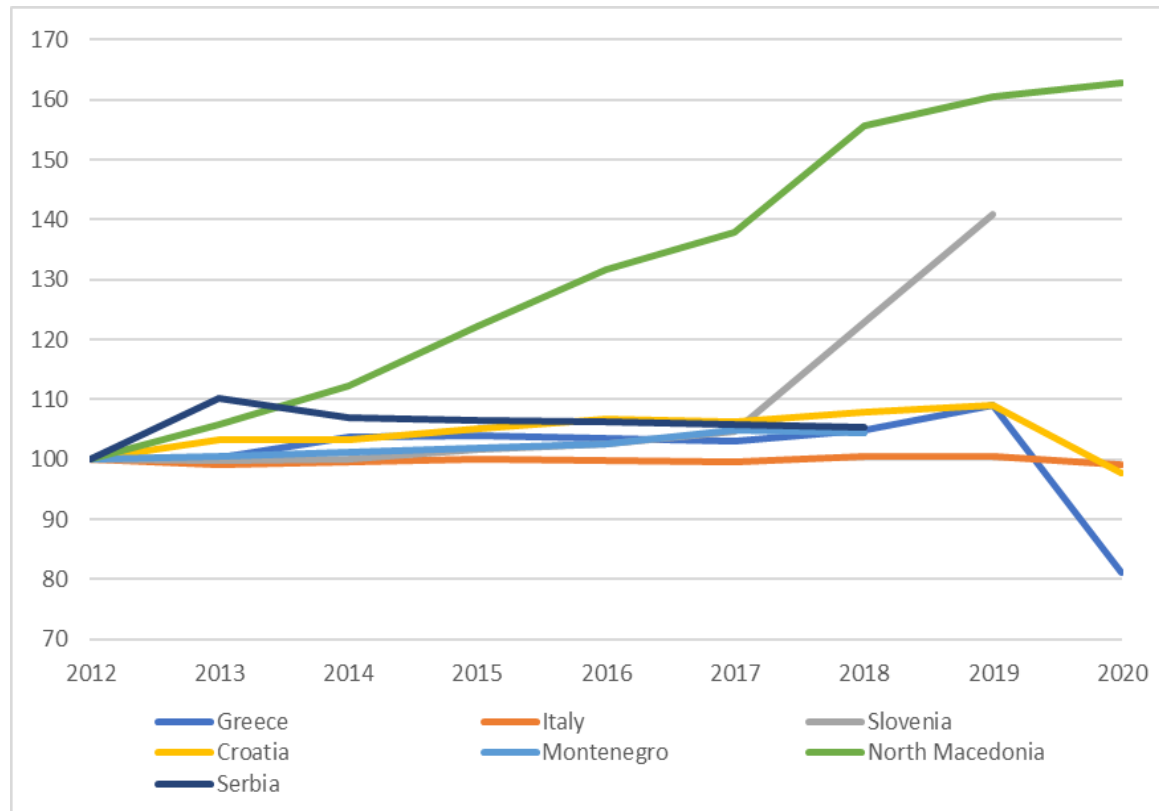
# Sustainable tourism indicators (1)

Number of arrivals of non-residents staying in hotels and similar accommodation establishments (2012=100)



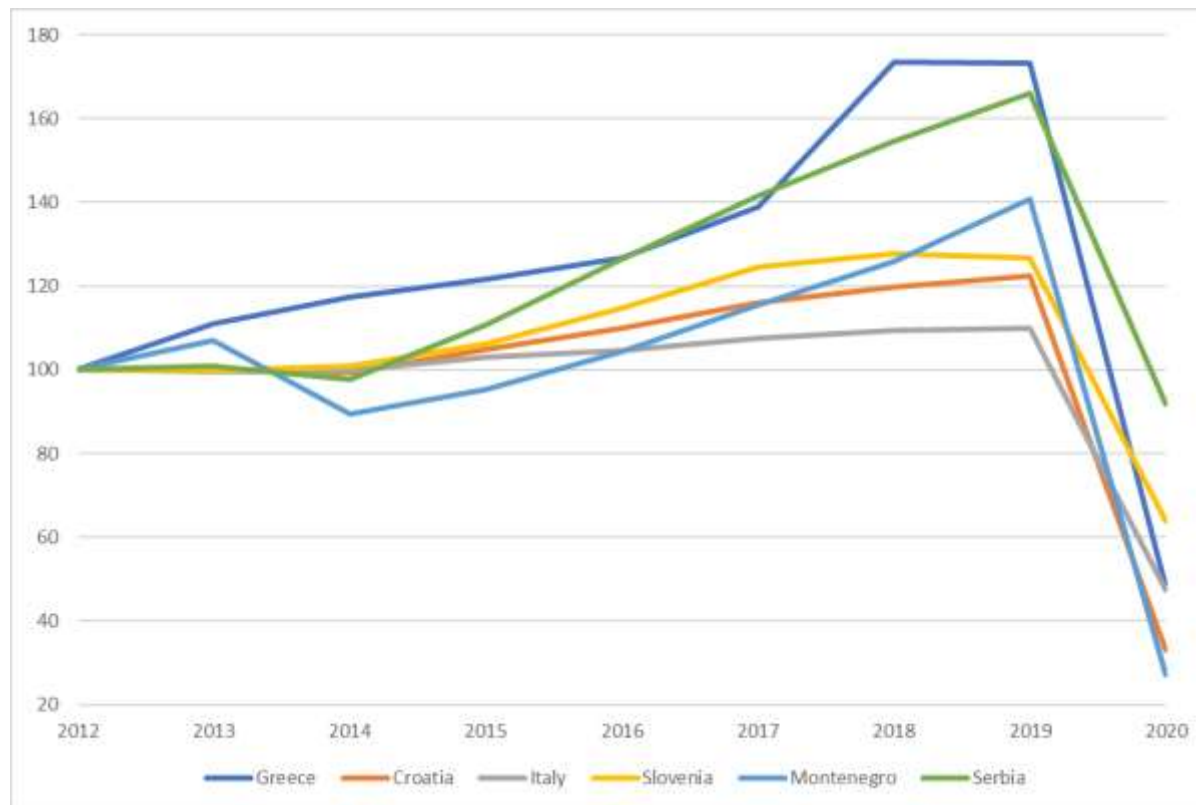
## Sustainable tourism indicators (2)

Number of bed places in hotels and similar accommodation establishments, 2012-2020 (2012=100)



# Sustainable tourism indicators (3)

Number of overnight stays in hotels and similar accommodation establishments, 2012-2020 (2012=100)



# New Indicators (1)

- **Intensity of greenhouse gas (CO2) emissions into the air from tourism**
- Measures the impact of tourism, including plane flights and boat rides, as well as the various activities, to carbon footprint
- Still not used in databases
- Estimated that tourism is responsible for roughly 8% of the world's carbon emission



## New Indicators (2)

### Travel & Tourism Competitiveness Index – Environmental Sustainability

EUSAIR country	2017		2019	
	Travel & Tourism Competitiveness Index – Environmental Sustainability	Rank	Travel & Tourism Competitiveness Index – Environmental Sustainability	Rank
Greece (EL)	4.48	39	4.5	37
Italy (IT)	4.49	37	4.3	64
Slovenia (SI)	5.07	10	5.4	8
Croatia (HR)	4.73	21	5.1	14
Montenegro (ME)	4.33	49	4.7	26
Albania (AL)	4.11	72	4.3	62
Serbia (RS)	4.18	61	4.5	40
Bosnia and Herzegovina (BA)	3.89	94	4.3	65
North Macedonia (MK)	3.74	105	3.6	105
San Marino	-	-	-	-

# Conclusion

- The EUSAIR countries affected by the pandemic
  - The number of arrivals and overnight stays declined greatly, as well as the contribution of the tourism to the economy
  - Economic indicators were decreasing in 2020, but some of them started to recover in 2021
  - Sustainable tourism result indicators showed decrease in 2020 compared to the period 2017-2019
- The pandemic helped to change the way tourism is experienced. It is recognized that tourism has to be more sustainable. Therefore, the European Commission published a report that presents a framework for the development of sustainable tourism. Among other, the report recognizes the importance of following areas:
  - Investment in circularity to reduce energy, waste, water and pollution, and at the same time to better meet the increasing demand for sustainable tourism;
  - Enhancing data sharing practices to allow for new innovative tourism services and improve the sustainable management of destinations;
  - Investment in skills to ensure the availability of qualified workforce and attractive careers in the ecosystem.
- Operational Programmes for the financial period 2021-2027 are being developed, it is expected that they will follow the recognized need for sustainable tourism projects and innovation in order to ensure sustainable development in the AIR.
- Among European Macro-regional Strategies, only EUSAIR has sustainable tourism as one of the key Pillars. Even though the Adriatic-Ionian Region is most touristic region among them, it is important that other regions also recognize the importance of sustainable tourism as a framework for sustainable growth in the future.

# Thank you!