State of play and challenges on Tourism and Sustainability in the Mediterranean

Jérémie FOSSE, Director, Eco-union
Dr Céline DUBREUIL, Programme Director, Plan Bleu
Gloria LAZARO, Programme officer, Plan bleu

5 October 2022
Plan Bleu / Regional Activity Centre

- **Created 43 years ago** as a systemic and prospective analysis centre in the Mediterranean
- **A Regional Activity Centre** attached to the Mediterranean Action Plan (MAP – 1976), first-ever UNEP Regional Seas programme
- The MAP supports the implementation and enforcement of **the Barcelona Convention** and its 7 protocols
- Partner of the Interreg MED Sustainable Tourism Community and 2 other communities from 2016 to 2022
- Created in 2005 as independent environmental Citizen Think and Do Tank
- Based in Barcelona to promote Sustainable Development in the Euro-Mediterranean region
- Focusing on interlinkage between prosperous Society, healthy Environment and inclusive Economy
Tourism is a key activity in the Mediterranean and it is considered in the Barcelona Convention: Mediterranean Strategy for Sustainable Development, Sustainable Consumption and Production Action Plan, Integrated Coastal Zone Management Protocol, Post-2020 SAP BIO

- The Mediterranean hosts about one third of world tourism
- More than 400 million International Tourists Arrivals (ITAs) in 2019
- Most important sectors of the tourist market in the Mediterranean countries are: cruises, nautical activities, sun and beach holidays and cultural getaways
- Coastal tourism is the backbone of Mediterranean’s economies and strategies of development, as it triggers sectoral synergies (e.g. between the transportation, accommodation, food and beverage, and entertainment sectors)
OBJECTIVES

- To **mainstream the results** of the projects into European, national, regional and local policies
- To **enhance and enlarge the MED Sustainable Tourism Community**
- To **ensure synergies** between relevant Mediterranean stakeholders including managers, policymakers, socio-economic actors, civil society and the scientific community.

MAIN TOPICS

- Enhancing attractiveness and tourism offer in the Mediterranean region
- Addressing tourism pressures in the Mediterranean region
- Strengthening planning and management practices towards sustainable tourism
The report’s objective is to support decision-makers and local communities to build a smarter, greener and safer tourism.

Considering:

- Challenges (climate change, biodiversity loss, circularity, Covid-19)
- New trends
- New international initiatives
- 10 Case studies

Survey with key Mediterranean stakeholders

2017 -> 2022
Focus on socio-economic data

- Mediterranean tourism is amongst the highest income generating industries of the region.
- Tourism in the Mediterranean accounted for 11.3% of Gross Domestic Product (GDP) and represented over 70% in terms of Production Value and Gross Value Added before the COVID-19 pandemic (UNEP/MAP, 2017).
- Pre-pandemic studies highlighted that tourism was expected to increase even more, reaching 12.5% of the region’s GDP by 2026, and accounting for 2.8 million jobs by 2027 (Petrick et al., 2017).

Sources:
The top three North Med countries that suffered the most harsh impacts of COVID-19 in their economies, based on their changes in GDP, were:

- Montenegro
- Croatia
- Greece

Focus on socio-economic data

The COVID-19 crisis put “between 100 and 120 million direct tourism jobs at risk [all over the world], many of them in Small and Medium-sized Enterprises” (UNWTO, 2021).

Sources:
UNWTO. (2021). World Tourism Organization. 2020: Worst Year in Tourism History with 1 billion fewer international arrivals. Graph: Eco-Union from WTTC data.
Post-pandemic trends

- Next 2023, international passenger numbers are expected to exceed pre-pandemic levels (MO, 2021).
- Mediterranean forecasts expect 500 million ITAs in 2030, meaning potentially 250 million ITAs in coastal areas, in addition to the domestic tourists (Petrick et al., 2017).

**Trends** show a reorientation on (ETC, 2021):
- Proximity markets or neighbouring regions
- Seeking outdoor spaces and activities -> ecotourism
- Low-carbon travels (train)
- Long stays
- Tourism deseasonalization
- Digitalisation
- Supporting local businesses and tourism service providers

Sources:
Challenges for Tourism in the Mediterranean

- Climate change
- Biodiversity preservation
- Circularity
- Social inequity
- Pandemic recovery
- Overtourism

Paving the way towards sustainable transition: Key examples

- Review of International initiatives
- **10 case studies** in the State of Play Report
- Catalogue of **best practices** on Sustainable Tourism in the Mediterranean
- **Handbook** on “How to use EU funding for Sustainable Tourism”
- Regional **guidelines** for the sustainability of cruises and recreational boating in the Mediterranean Region
Paving the way towards sustainable transition: Key examples

Main Goal

To showcase a range of examples of the Sustainable Tourism Community (STC) which have been successfully incorporated into policies with concrete results to support decision-makers and local communities to foster the adoption of the best practices on sustainable tourism in the Mediterranean Region.
Catalogue of Best Practices on Sustainable Tourism in the Mediterranean

Destination selection criteria

1. Faced some issues or challenges
2. Having acted on one or more of those issues
3. Having obtained results and lessons learnt
4. Having had stakeholder collaboration
5. Replicability of the experience
6. Having implemented the lessons learnt into public policy

8 Best practices

Where?
- Big city
- Island
- Inland
- Coastal
Success at what?

• At managing flows
• At commercialising ecotourism packages
• At reducing energy, water and waste
• At diverting flows through new sustainable experiences
• At implementing sustainable mobility solutions
The main impacts obtained were:

1. To limit to 8,000 cruise passengers per day.
2. Better cruise ship arrival schedule during the week.
3. A better coordination and distribution of the passenger embarkation.
4. Developing a Berthing Policy (BP) 2 years in advance.
→ Provide targeted information on sustainability goals and practices for the cruise and recreational boating sectors, and
→ aim to support the key players involved in promoting the long-term transition of both sectors to sustainability
→ 5 challenges identified with, for each, a selection of "high impact actions" (by sector)
→ 68 good practices for the sustainable development of these sectors

...contributes to the ICZM Protocol - Article 9 e) et f) – of the Barcelona Convention
Guidelines for the sustainability of cruises & recreational boating in the Mediterranean Region

5 major challenges have been identified for these two sectors:

1: **Eliminating** atmospheric emissions of pollutants and greenhouse gases

2: **Safeguarding ecosystems and biodiversity**

3: **Eliminating water pollution** (chemical, organic, wastewater effluents), preventing waste generation and improving waste management

4: **Boosting knowledge and innovation**

5: **Avoiding the impacts** of these two sectors on local socio-economic systems
68 good practices identified

→ To report on **good practices** to allow a sustainable development of these sectors for the direct stakeholders of the cruise or recreational boating

→ **To provide food for thought** for policy makers and competent authorities to legislate and limit pollution from these sectors

→ 5 challenges identified with, for each, a **selection of "high impact actions" (by sector)**

**Spatial measures**

**Regulatory measures**

**Technological solutions**
Recommendations for a sustainable tourism in the Mediterranean

• The COVID-19 pandemic presents a unique **opportunity for change**
• The use of **ecosystem-based management** (EBM) should be at the heart of any decision linked to sectoral activities including the touristic sector
• All **stakeholders have a role to play**: We need to work together and capitalize on good practices
• Tourism should be considered as a **cross-cutting sector** (so requiring trans-sectoral policies)
• **Alternative models to mass tourism** should be promoted, avoiding concentration in time and space
• Pay attention & assess the **carrying capacity of destinations**
• Promote **greener transports, longer stays and nearer destinations**
• **Monitor tourism sector** (socio-economic and environmental impacts) at national, regional and local level
Thank you for your attention

www.planbleu.org