

**European Charter for Sustainable Tourism in protected areas (Charter):
The value of the “Charter” in identifying sustainable tourism destinations.**

European Charter for Sustainable Tourism in Protected Areas

A comparison between EU Sustainable Tourism indicators and the Principles of the European Charter for Sustainable Tourism in Protected Areas

Ein Vergleich zwischen den Indikatoren für nachhaltigen Tourismus der EU und den Prinzipien der Europäischen Charta für Nachhaltigen Tourismus in Schutzgebieten

A comparison between EU Sustainable Tourism Indicators and the Principles of the European Charter for Sustainable Tourism in Protected Areas

A Report by EUROPARC Consulting Limited



Hiking in one of Scotland's foremost Charter Parks - Loch Lomond and The Trossachs National Park, Ben Vorlich Summit

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1 Comparison between EU Sustainable Tourism Indicators and Principles of the European Charter for Sustainable Tourism General Background

This project was carried out by the EUROPARC Consulting team led by Bettina Kreisel who compiled this report. Its objective is to look at the indicators for sustainable tourism destinations produced by the Tourism Sustainability Group (TSG) in comparison with the indicators embedded in the Charter for Sustainable Tourism (ECST) developed by the EUROPARC Federation. The idea is to identify gaps and possible synergies between them and to see how the verification process of the Charter can be further developed in order to qualify sustainable tourism destinations recognized on the EU level.

EU indicators – Measuring progress, testing the implementation

In 2004 the Tourism Sustainability Group (TSG) was set up by the European Commission. One of the tasks of this group was to provide a framework for action for stakeholders and guidance for local destination management. In this context a set of indicators has been developed as a tool to monitor and review sustainable tourism development.

On the grounds of the three pillars of sustainability aiming at a balance of economic, socio-cultural and environmental issues, 20 core indicators were identified as main themes to be observed. In order to measure progress 78 measurements have been defined addressing the indicators. These are not to be seen as an evaluation system or scores, but the **measurements are fixed key figures for data collection.**

In addition, two more optional destination specific indicators along with four measurements have been identified. The final draft of the “Indicator system for Sustainable Tourism Destinations” was finished in 2009.

The system of the EU indicators is now at a **testing stage**. In the course of 2010, the implementation of the indicators and measurements was tested in EDEN destinations. 15 pilot destinations were chosen which include different countries, landscapes and types of destinations. The findings were published in the report “Test to implement tourist indicators in EDEN Destinations – Evaluation report”, Barcelona, 2010.

As a general result it became clear that most of the pilot destinations showed a lack of data and had difficulties in collecting them. The fact that data often were not available illustrated the need for specific surveys in the areas. Moreover, due to the differences of the destinations the data were not comparable.

The report gives strategic recommendations on how to proceed with implementing the indicators in the future. It is estimated that this next step of implementation will last one year. The idea is to continue the testing with some pilot areas willing to carry on with monitoring in the long term. To facilitate the implementation the report contains guidelines and templates for surveys (visitors, residents, enterprises and employees) as a tool for future data collection.

Moreover it is suggested that the amount of measurements shall be reduced according to the individual situation in the area. In the next testing phase, pilot areas could then concentrate on a selection of measurements which are available, easy to collect and most relevant to them. However, all 20 indicators have to be addressed with the selection of measurements.

EDEN destinations

The project “European Destinations of Excellence” (EDEN) is an initiative of the European Commission, DG Enterprise and Industry, launched in 2006. The idea is to award incentives that promote sustainable tourism. The underlying objectives of EDEN are sustainability, networking of stakeholders, combating seasonality and helping de-congestion, ideas which are also reflected in the Principles of the European Charter for Sustainable Tourism.

Every year EDEN focuses on a different special theme which is defined along with the national tourism bodies. In 2010 the theme was Aquatic Tourism. Weerribben-Wieden National Park (NL), which is also a European Charter area, was one of the 20 areas in question. Themes in previous years were rural tourism, Europe’s intangible heritage and tourism in protected areas as themes.

After the annual theme has been chosen, a set of general and specific award criteria is defined on EU and national level. Each country manages its own selection process. In close cooperation with national tourism bodies one destination per participating country is selected.

Compared to the certification scheme of the ECST which also includes re-evaluation after five years as an additional step, EDEN is rather designed as an annual campaign, based on a competition, showcasing and awarding the winners. The idea is to create a platform for examples of good practice and also to promote networking between the awarded destinations which are aspects that are comparable to the ECST.

There is a difference between the potential areas which can apply.

One of EDEN’s objectives is to rebalance tourist flows towards non-traditional destinations, so in addition to selecting areas according to the annual theme, EDEN preferably chooses destinations which are less known in order to help their development by sustainable tourism.

In contrast, the European Charter for Sustainable Tourism in Protected Areas is a scheme, as the name implies, which focuses on protected areas.

European Charter for Sustainable Tourism in Protected Areas – Principles, issues, scores

The European Charter for Sustainable Tourism in Protected Areas (ECST) is an award developed by the EUROPARC Federation involving a complex application and verification process. This includes the preparation of a detailed application dossier by the protected area, an evaluation visit and report by a trained EUROPARC verifier and the final verification by the Evaluation Committee consisting of experts of tourism and protected areas of various European countries. After five years the area has to undergo a re-evaluation process if it wants to keep Charter status.

The programme started in 2001 and at the moment 77 protected areas have qualified as Charter areas. The possible awards and partnerships under the umbrella of the Charter are directed toward three different partner groups: the protected areas (part I of the Charter) and tourism enterprises (part II of the Charter). These two parts of the Charter are fully operational whereas part II which is addressed to tour operators is still being developed.

The Charter relates to the **same background** as the EU indicators. Both address economic, socio-cultural and environmental issues. In the Charter they are covered by **10 Principles** which lead to 58 questions and another 14 questions as general information. All the

Principles and questions have to be addressed by candidate Charter areas and are subject of evaluation.

As to the EU measurements, the Charter defines very few fixed key figures for data collection - except in context of "Section A – General information" where some measurements are suggested. Even though key figures are not generally requested, the Charter requires data collection. Assessments, surveys and monitoring referring to the various fields of the Principles are obligatory for Charter areas.

In the evaluation each of the Principles and questions is commented on by the verifier. The main idea is to give evidence of the action taken in each field. Evidence can involve data, but in general the majority of the Charter questions are answered in a **more qualitative manner**.

In addition to the comments there is a **scoring system** for each of the questions. The scores are as follows:

- X – Not relevant
- 0 – Nothing happening
- 1 – Weak, little action
- 2 – Moderate – action happening in this area, sufficient at present
- 3 – Good – significant action, totally satisfactory
- 3* - Excellent example of best practice

In a verifiers' meeting in 2009, generously sponsored by the Bundesamt für Naturschutz on the island of Vilm, **indicators for minimum requirements, non-awarding conditions and best practice** were defined for four of the ten Principles and their sub-themes. This tool should be completed as it can serve as a guideline both for future verifiers and candidate areas.

It is remarkable that, though the score indicators had not been fixed until then, the definition of the first set showed that the verifiers shared very much the same feeling about their scores. The reasons for this can be seen in regular mechanisms of exchange by meetings and seminars, the involvement of the verifiers in the making of the Charter from its first steps, the continuity and contact of experienced and new verifiers which were essential mechanisms to create a shared philosophy. This is important not only in the context of making evaluations consistent but also because the verifiers act as ambassadors and consultants for the candidate areas to help and motivate them to develop sustainable tourism.

In the framework of **the action plan**, candidate **areas have to define indicators**. The action plan is derived from the findings of their tourism strategy and assessments. Referring to the individual actions and objectives the protected area is asked to define indicators in order to measure progress and success of the action plan.

Indicators of development are also included in the application and evaluation by giving evidence of what is happening today and what actions are intended in each of the themes.

On the whole the **questions in the Charter questionnaire have the function of indicators** since they are very detailed in order to illustrate how well the area has implemented the Principles. These questions are aimed more at qualitative information than data collection. At the same time, the answers can respond to the individual situation of the candidate area.

The advantage of the Charter's more qualitative approach is that it thus becomes very flexible and it can be applied to very different situations and actions taken.



2 Comparison between EU Sustainable Tourism Indicators and Principles of the European Charter for Sustainable Tourism Comparison

The references used for the following comparison are the EU indicators and measurements as listed in the Evaluation report “Test to implement tourist indicators in EDEN Destinations” (2010) and the “Indicator System for Sustainable Tourism Destinations” worked out by the EU Tourism Sustainability Group (2009).

The references to the European Charter for Sustainable Tourism are the official formats used for application and evaluation. Numbers in brackets indicate the 10 Charter Principles and the questions related to them (e.g. 3.2 = Principle 3, question 2). The letters A, B, etc., refer to the “General Information” which is required of the candidate areas.

Since in most of the cases measurements in the sense of key figures are not suggested in the Charter the analysis looks at the themes of the indicators and measurements and whether these are reflected in the Charter’s Principles and questions.

“Green” indicates if the Charter addresses the themes of the indicators.

“Orange” indicates missing issues in the Charter.

“Blue” indicates Charter issues not covered in the EU indicators.

Indicator 1 “Tourism volume and Value”

Measurements

1. Number of tourist nights per month
2. Daily spend per tourist
3. Number of same day-visitors per month
4. Daily spending per same day-visitor
5. Relative contribution of tourism to the destinations economy, i.e. tourism generated income as a percentage of total GVA

Charter Principles and questions which address this indicator:

Annual visitor numbers (A 12) - indication of day-visitor, staying visitor, total nights

Tourism structure (A13) – qualitative overview of tourism history and type

Assessment of visitor patterns and needs (2.10)

Surveys to measure visitor satisfaction (4.1)

Keeping a record of visitor numbers over time and space (10.1)

Comments:

The indicator “Tourism volume and value” is addressed by various Principles and questions in the Charter.

Tourism value is not explicitly mentioned as a theme. Daily spending and contribution of tourism for the economy are not mentioned explicitly as subjects.

Measurement 1 and 3 are suggested but without indication of the month.



Possible integration in the Charter:

Improvement of A12 by integrating the EU measurements
Integration of the guidance and visitors survey template

Indicator 2 “Tourism Enterprises Performance”

Measurements

1. Occupancy rate in commercial accommodation per month and average for the year
2. Percentage of tourism enterprises participating in cooperative marketing
3. Average REV PAR (Revenue per available room) in destination

Charter Principles and questions which address this indicator:

Annual visitor numbers (A12) – suggested measurements: occupancy rate of bed space, percentage of enterprises reporting growth
Tourism infrastructure (A14) – overview of the amount and type of accommodation
Assessment of strength/weaknesses of tourism infrastructure/services (2.9)
Tourism structure (A13) – overview of the tourism history and type of tourism
Action to monitor and improve the quality of facilities and services (4.5, 4.6)
Involvement of tourism enterprises in tourism partnership (1.2)
Consultation of local enterprises in preparing the tourism strategy and action plan (2.5)
To ensure that tourism enterprises provide good information (5.5)

Comments:

The indicator “Tourism enterprises performance” is addressed by various questions in the Charter and its Principles.

The Charter takes a wider approach in context of tourism enterprises. In addition to the EU measurements it looks at:

- ♦ involving them in the tourism partnership and in the shared strategy;
- ♦ assessing of strengths/weaknesses;
- ♦ monitoring and improving quality;
- ♦ ensuring the quality of promotional activities.

Measurement 1 is suggested but without indication of the month, average/year.

Additionally the measurement “percentage of enterprises reporting growth” is mentioned.

Revenue/available room is not suggested as a measurement, and it would be helpful to integrate it in the assessment.

Though partnership and communication play a major role in the Charter, cooperative marketing is not addressed explicitly as a theme.

Possible integration in the Charter:

Questions on tourism enterprises should be transferred from A12 to A14.
Improvement of A14 by integrating the EU measurements.
Integration of guidance and enterprises survey template.

Missing aspects in the EU indicator:



Quality, promotional activities, partnership and involvement.

Indicator 3 “Customer Satisfaction”

Measurements:

1. Percentage of visitors that are satisfied with overall experience
2. Percentage of repeat/return customers (within five years)
3. Value/price rating by visitors

Charter Principles and questions which address this indicator:

Charter Principle 4: To provide all visitors with a high-quality experience

Assessment of existing visitor patterns and needs (2.10)

Surveys to measure visitor satisfaction (4.1)

Assessment of future visitor markets (2.11)

Comments:

The indicator “Customer Satisfaction” is addressed by a Charter Principle and various questions.

Data on visitor satisfaction, needs and patterns are required in the context of surveys and assessments.

No special **measurements for visitor surveys** are suggested. Therefore, the themes of “revenue” and “repeat customers” are not explicitly addressed.

With the aspect of **future visitor markets** the Charter takes an additional approach.

Possible integration in the Charter:

Integration of the EU measurements in the “Assessment of existing visitor patterns” (2.10) and “Visitor survey” (4.1)

Integration of the guidance and templates on Visitors Survey

Missing aspects in the EU indicator:

Future visitor markets

Indicator 4 “Community/Social Impact”

Measurements:

1. Number of available beds per 100 residents
2. Number of tourists / visitors per 100 residents
3. Number of second / rental homes per 100 homes
4. Percentage of local residents who are satisfied with tourism in the destination (per month / season)
5. Percentage of local residents directly or indirectly benefiting from tourism

Charter Principles and questions which address this indicator:

Charter Principle 8: Tourism that supports and does not reduce the quality of life of local residents

Charter Principle 9: Benefits to the local economy and local community

Annual visitor numbers (A12) - suggested measurements: number of bed spaces per 1000 local population, ratio of number of tourist to local population

Involvement of local community in tourism partnership (1.3)

Consultation of local community in preparing tourism strategy and action plan (2.6)

Assessment of the needs of the local community and economy (2.8)

Involving local communities in the planning of tourism in the area (8.1)

Communication between the protected area, local people and visitors (8.2)

Mechanisms to identify, seek and reduce conflicts (8.3)

Promoting the purchase of local products (9.1)

Encouraging the employment of local people in tourism (9.2)

Development of tourism & traditional economic activity (9.3)

Comments:

The indicator “Community/Social impact” is addressed by various Charter Principles and questions.

Measurement 1 and 2 are suggested but are slightly differently.

In context of local residents, the Charter requires an assessment of the needs, mechanisms to identify conflicts, their involvement and consultation. The Charter takes a more qualitative approach.

No special **measurements for resident surveys** are suggested. Therefore, though local benefits are a required Principle - “benefit from tourism” and “residents’ satisfaction” are not explicitly addressed for data collection.

Second/rental homes are not mentioned as a theme or measurement.

Possible integration in the Charter:

Integration of the EU measurements 1 - 3 in A12

Integration of EU measurements 4.-5. in connection with the assessment of the local community and economy (2.8)

Integration of the guidance and templates on Residents Survey in connection with setting up mechanisms to identify conflicts (8.3)

Indicator 5 “Quantity and Quality of Employment”

Measurements:

1. Direct tourism employment as percentage of total employment
2. Percentage of jobs in tourism that are seasonal
3. Percentage of “non-resident” employees per month
4. Local unemployment rate per month
5. Percentage of employees in tourism who indicate they are satisfied with their jobs
6. Ratio of average wage per employee in tourism to average wage in destination
7. Percentage of employees in tourism holding relevant qualification at basic, intermediate or higher level
8. Percentage of tourism enterprises where the employees receive any training

Charter Principles and questions which address this indicator:

Charter Principle 9: To increase benefits from tourism to the local economy
Assessment of the local community and economy (2.8) Encouraging
the employment of local people in tourism (9.2) Providing training of
tourism enterprises in sustainable tourism (7.2) Promoting the
purchase of local products (9.1)
Development of tourism in association with traditional economic activity (9.3)

Comments:

The indicator “Quantity and Quality of Employment” is addressed by various
Charter Principles and questions.

The Charter requires action in this field which is a more qualitative approach.

An assessment of the local economy is required but a detailed **analysis on the
employment situation in tourism** is not mentioned explicitly.

Measurements to get basic information about the employees in tourism are not
suggested and fixed. Thus issues of **unemployment, wages, job qualification** are not
addressed explicitly.

Possible integration in the Charter:

Integration of the EU measurements in the assessment for 2.8 in order to measure
progress in tourism employment in connection with the Charter questions 9.2 and 7.2.
Integration of the guidance and Employees Survey template

Indicator 6 “Gender Equality”

Measurements:

1. Average wage in tourism for women compared to men’s employment
2. Percentage of men and women in tourism employment

Charter Principles and questions which address this indicator:

“Gender Equality” is not addressed in the Charter Principles and questions.

In the full Charter text “The Charter” (2010) the issue is integrated in the field of training
and job creation which “...will favour versatility and social integration with due regard to
the needs of women...” (page 10)

Possible integration in the Charter:

The EU indicator and measurements could be integrated in the “Assessment of needs of
the local community and economy” (2.8) and in “Encouraging employment of local people
in tourism” (9.2)

Integration of guidance and Employees Survey/Enterprises Survey templates.



Indicator 7 “Equality - accessibility”

Measurements:

1. Percentage of sites considered accessible
2. Percentage satisfaction level of customers with disabilities
3. Percentage of commercial accommodation with accessible rooms
4. Participation of commercial accommodation in recognised accessibility schemes (0 - 100%)
5. Percentage of visitor attractions/sites that are part of recognised accessibility schemes
6. Availability of local public transport system and vehicles that are accessible for wheelchair users in each modal category

Charter Principles and questions which address this indicator:

- Specific provision of facilities and information for disabled people (4.3)
- Assessment of the strengths/weaknesses of tourism infrastructure/services (2.9)
- Assessment of visitor patterns and needs (2.10)
- Surveys to measure visitor satisfaction (4.1)

Comments:

The indicator “Equality – accessibility” is addressed by various Charter Principles and questions.

Assessments and surveys are required but the **situation of accessibility** is not mentioned explicitly as an aspect to be analysed. Measurements are not fixed or suggested.

As an additional aspect the Charter also addresses “**information**” in the context of accessibility.

Moreover, the Charter addresses the group of “**economically disadvantaged people**” in the context of providing tourism facilities.

Possible integration in the Charter:

Integration of the EU measurements 1, 3 and 4 in context with the assessment (2.9) and (4.3) in order to measure progress in this issue.

Integration of EU measurement 2 on satisfaction of disabled people with tourism facilities in visitor survey (4.1).

Integration of the guidance and Visitors Survey template

Missing aspects in the EU indicator:

- Information for disabled people
- Economically disadvantaged people



Indicator 8 “Reducing transport impact”

Measurements:

1. Average length of stay of tourists (nights)
2. Average length of stay, day-visitors (hours)
3. Average km travel by tourists to and from home to destination
4. Average km travel by day-visitors from and to destination
5. Percentage usage of different modes of transport (public/private and type) for arriving tourists and day-visitors
6. Percentage of visitors using local/soft mobility services

Charter Principles and questions which address this indicator:

Promoting use of public transport, cycling and walking as an alternative to private cars. (10.3)

Keeping a record of visitor numbers over time and space (10.1)

Annual visitor numbers (A 12) - indication of day-visitor, staying visitor, total nights

Assessment of existing visitor patterns and needs (2.10)

Comments:

The indicator “Reducing transport impact” is addressed by a Charter Principle and various questions.

Assessments and surveys on visitors are required and “soft mobility/public transport” are required as a major issue for action.

Measurements are not suggested, especially **km travel and modes of transport are not explicitly addressed as a subject for surveys**

Possible integration in the Charter:

Integration of the EU measurements in the assessment of visitors (2.10) in order to measure progress in tourism employment in connection with the Charter questions 9.2 and 7.2.

Integration of the guidance and Visitors Survey template.

Indicator 9 “Climate Change”

Measurements:

1. Percentage of tourism infrastructure (commercial accommodation, others) located in “vulnerable zones” (e.g. flood risk, avalanche)
2. Presence of destination climate change adaption strategy and plan
3. Percentage of tourism enterprises that are involved in “adaptation” response and actions
4. Percentage of tourism enterprises involved in climate change mitigation schemes such as CO₂ offset, low-energy systems, etc.



Charter Principles and questions which address this indicator:

Action to control development including tourism which would adversely affect the quality of landscapes, air and water; use of non-renewable energy; and create unnecessary waste and noise (3.3)

Action to reduce tourism activities which adversely affect the quality of landscapes, air and water, use non-renewable energy; and create unnecessary waste and noise (3.4)

Monitoring impact on flora and fauna (3.1)

Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The Charter Principles and questions address action to control and reduce environmental impact including **action regarding “renewable energy”** as **one of the issues**.

Monitoring the impact on flora and fauna is required in general. **The indicator “Climate Change” is not explicitly addressed** in context of an assessment or survey.

No specific measurements are suggested.

Suggestions for the Charter:

Integration of an additional issue “environmental performance” in the assessment (2.8) by using the EU indicator and measurements

Integration of the guidance and Enterprises Survey template

Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises, in the context of Charter part II

Indicator 10 “Sustainable tourism management practices in tourism enterprises”

Measurements:

1. Percentage of tourism enterprises/establishments in the destination with externally verified certification/labelling for environmental/sustainability and/or CSR measures
2. Number of establishments with sustainability report in accordance with Global Reporting initiative

Charter Principles and questions which address this indicator:

Action to control development including tourism which would adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise (3.3)

Action to reduce tourism activities which adversely affect the quality of landscapes, air and water, use non-renewable energy; and create unnecessary waste and noise (3.4)

Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The indicator and measurements of **“Sustainable tourism management practices”** are **not explicitly addressed** by the Charter Principles and questions. They are more **subject of part II of the Charter**.

Action to control and reduce environmental impact is included in the Charter Principles. No specific measurements are suggested in the context of **assessing and surveying tourism enterprises**.

Possible integration in the Charter:

Integration of an additional topic “environmental performance” in the assessment (2.8) by using the EU indicator and measurements

Integration of the guidance and Enterprises Survey template

Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises, in the context of part II of the Charter

Indicator 11 “Solid-waste management”

Measurements:

1. Percentage of tourism enterprises involved in waste reduction activities
2. Waste volume produced by destination (tonnes per person per year)
3. Volume of waste recycled percentage or per person per year (preferably per month)

Charter Principles and questions which address this indicator:

“Action to control development including tourism which would... create unnecessary waste” (3.3)

“Action to reduce tourism activities which would... create unnecessary waste” (3.4)

Monitoring impact on flora and fauna (3.1)

Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The Charter Principles and questions address actions to control and reduce environmental impact, and **“unnecessary waste”** is one of the issues mentioned. Monitoring the impact on flora and fauna is required in general. **The indicator “Solid waste management”** is not explicitly addressed in the context of an assessment or survey.

No specific measurements are suggested.

Possible integration in the Charter:

Integration of an additional topic “environmental performance” in the assessment (2.8) and surveys (3.3, 3.4) by using the EU indicator and measurements

Integration of the guidance and Enterprises Survey template



Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises, in context of part II of the Charter

Indicator 12 “Sewage treatment”

Measurements:

1. Percentage of sewage discharge treated in destination

Charter Principles and questions which address this indicator

“Action to control development including tourism which would adversely affect the quality of water, ...” (3.3)

“Action to reduce tourism activities which would adversely affect the quality of water... “ (3.4)

Monitoring impact on flora and fauna (3.1)

Comments:

The Charter Principles and questions address actions to control and reduce environmental impact. **“Water quality”** is mentioned as **one of the issues**. Monitoring the impact on flora and fauna is required in general. **The indicator “Sewage treatment” is not explicitly addressed** in context of an assessment or survey. No specific measurements are suggested.

Possible integration in the Charter:

Integration of an additional topic “environmental performance” in the assessment (2.8) and surveys (3.3., 3.4) by using the EU indicator and measurement

Indicator 13 “Water Management”

Measurements:

1. Fresh Water consumption (in litres) per tourist night
2. Percentage of tourism enterprises participating in water-saving actions
3. Percentage leakage rates in destination
4. Percentage of tourism enterprises using recycled water
5. Percentage of recycled water in the destination

Charter Principles and questions which address this indicator:

Action to control development including tourism which would adversely affect the quality of water, ... (3.3)

Action to reduce tourism activities which would adversely affect the quality of water ... (3.4)

Monitoring impact on flora and fauna (3.1)



Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The Charter Principles and questions address actions to control and reduce environmental impact. **“Water quality”** is mentioned as **one of the issues**. Monitoring the impact on flora and fauna is required, but **the indicator “Water management” is not explicitly addressed** in context of an assessment or survey. No specific measurements are suggested.

Possible integration in the Charter:

Integration of an additional topic “environmental performance” in the assessment (2.8) and surveys (3.3, 3.4) by using the EU indicator and measurements
Integration of the guidance and Enterprises Survey template
Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises in context of part II of the Charter

Indicator 14 “Energy Usage”

Measurements:

1. Per-capita consumption of energy from all sources (overall and by tourist sector – per person per day)
2. Percentage of tourism enterprises participating in energy-saving actions
3. Percentage of enterprises and public entities using at least 50% renewable energy

Charter Principles and questions which address this indicator:

“Action to control development including tourism which would... use non-renewable energy” (3.3)

“Action to reduce tourism activities which would... use non-renewable energy” (3.4)

Monitoring impact on flora and fauna (3.1)

Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The Charter Principles and questions address actions to control and reduce environmental impact. **“Non-renewable energy”** is mentioned as **one of the issues**. **The indicator “Energy usage” is not explicitly addressed** in the context of an assessment or survey. No specific measurements are suggested.

Possible integration in the Charter:

Integration of an additional topic “environmental performance” in the assessment (2.8) and surveys (3.3, 3.4) by using the EU indicator and measurements



Integration of the guidance and Enterprises Survey template
Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises in context of part II of the Charter

Indicator 15 “Landscape and Biodiversity Protection”

Measurements:

1. Ecological potential of destination (guidance EEA)
2. Percentage of destination (geographical area in km²) that is designated for protection
3. Amount of urban growth
4. Percentage of local enterprises committed to actions to support local biodiversity and landscape protection, conservation and management
5. Percentage of visitors and residents complaining about litter and other environmental pollutions in the destination

Charter Principles and questions which address this indicator:

Assessment of the natural resources their sensitivities and capacities (2.7)
Type of designation including IUCN category (A3)
Size of protected area and its % of total area (A5)
Involvement of local and regional conservation interests in tourism partnership (1.4, 1.5)
Assessment of visitor patterns and needs (2.10)
Monitoring impact on flora and fauna (3.1)
Processes for ensuring that... tourism enterprises provide good information (5.5)
Encouraging visitors and the tourism industry to contribute to conservation (3.5)
Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The indicator “Landscape and Biodiversity Protection” is addressed by various Charter Principles and questions.

The Charter deals with protected areas, measurement 2 is covered.

Apart from the assessment of the natural resources the Charter’s approach contains further aspects like:

- ◆ involving conservation interests in the tourism strategy,
- ◆ monitoring flora and fauna,
- ◆ influencing tourism enterprises in their promotional activities and
- ◆ giving motivation for contributions for conservation.

No specific measurements are suggested in the assessment and monitoring of the natural resources.

Urban growth is not included as a subject.

The Charter requires the commitment and partnership of tourism enterprises but their commitment to conservation it is not included as a measurement.

Complaints about the environment are not explicitly mentioned in the framework of visitor surveys.

Suggestions for the Charter:



Integration of the EU measurement 1 in the assessment of the natural resources (2.7)
Integration of the EU measurement 4 in the context of the assessment and survey of progress of enterprises contributing to conservation (3.5)
Integration of the EU measurement 5 in surveys to measure visitor satisfaction (4.1)
Integration of the guidance and Visitors/Enterprises Survey templates
Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises in the context of part II of the Charter

Missing aspects in the EU indicator:

Involvement of conservation interests in partnership and tourism strategy
Influencing tourism enterprises in their promotional activities
Motivating visitors to contribute to conservation

Indicator 16 “Lights & Noise Management”

Measurements:

1. Existence of local strategy and plans to reduce noise and light pollution (yes/no)
2. Percentage of visitors and residents complaining about noise and light pollution
3. Community and private business measures to reduce noise and light pollution (yes/no)

Charter Principles and questions which address this indicator:

“Action to control development including tourism which would... create noise...” (3.3)

“Action to reduce tourism activities which would create... noise...” (3.4)

Monitoring impact on flora and fauna (3.1)

Part II of the Charter (which works with tourism enterprises) addresses the environmental performance of businesses and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The Charter Principles and questions address actions to control and reduce environmental impact including **“noise” as one of the issues** mentioned.

The indicator “Lights management” is not explicitly addressed.

No specific measurements are suggested.

Complaints about noise and light pollution are not explicitly mentioned in the framework of visitor surveys.

Suggestions for the Charter:

Integration of the topic “environmental performance” in the assessment (2.8) and surveys (3.3, 3.4) by using the EU indicator and measurements

Integration of the EU measurement 2 in surveys to measure visitor satisfaction (4.1)

Integration of the guidance and Residents/Visitors/Enterprises Survey template

Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises in the context of part II of the Charter



Indicator 17 “Inclusive Management Practices”

Measurements:

1. Presence of a destination management organisation or institutional arrangements involving public and private stakeholders in decision-making processes for tourism development and promotion
2. Percentage of residents satisfied with their involvement and influence in the planning and development of tourism
3. Existence of sustainable tourism strategy/action plan for the destination (with agreed monitoring and evaluation arrangement)
4. Does your visitor information (brochures and/or webpage) contain a specific section about sustainability issues?

Charter Principles and questions which address this indicator:

Charter Principle 1 – Tourism Partnership (1.1 – 1.6)

In context of this key principle detailed, information about the structure and work of the partnership is required. One of the six questions is, “Has a forum or other partnership structure been established to enable the protected-area authority to work with others on the development and management of tourism, including implementation and review of the strategy?” (1.1)

Charter Principle 2 – Tourism Strategy and Action Plan (2.1 – 2.22)

This key principle covers 22 questions and requires detailed information about preparation, consultation, assessment, implementation, commitment and monitoring of the strategy and action plan.

Charter Principle 5 – Communication about the area (5.1 – 5.6)

- ◆ Sensitive promotion of the protected area as a destination using authentic images and reflecting capacity/needs of the area, including times and locations (5.1)
- ◆ Processes for ensuring that others (especially tourism enterprises) provide good information (5.5)

Providing or supporting training programmes in sustainable tourism (7.1., 7.2)

Comments:

The indicator “Inclusive Management Practice” is addressed by various Charter Principles and questions.

Tourism Partnership and the Tourism Strategy play a key role in the Charter. This is illustrated by the number of questions to be answered in these fields which are more detailed than the information in the EU measurements 1 and 3.

The percentage of **residents satisfied with their involvement** (2.) is not explicitly suggested as a measurement.

“**Communication**” is one of the key principles of the Charter. Compared to the EU measurements the Charter does not require a “specific section on sustainability” in visitor information. However, by addressing sensitive promotion, influencing promotional activities, providing good information in context of the needs of the protected area it takes a **more detailed and practical approach**.

The Charter requires “sustainable tourism” as a subject in the context of training staff of the protected area, tourism organisations and enterprises (Principle 7).

Suggestions for the Charter:

Integration of the EU measurement 2 in the context of developing mechanisms for identifying conflicts (8.3) and in order to measure the success of consultation processes (2.6)

Integration of guidance and Residents Survey template

Missing aspects in the EU indicator:

More details about structure and work of the partnership (Charter 1.1 - 1.6)

More details about tourism strategy and action plan (Charter 2.1 - 2.22)

More practical approach in the field of “Communication” (Charter 5.1 – 5.6) as to sensitive promotion, providing good information and influencing promotion

Indicator 18 “Development Control”

Measurements:

1. Existence of land use or development planning including evaluation of tourism impact and detailing the development and constrained issues to tourism
2. Existence of the visitor management plan with capacity limits and analysis of current position (% of max. capacity)
3. Percentage of area subject to control land use planning and development control within the destination

Charter Principles and questions which address this indicator:

“Action to control development (including tourism) which would adversely affect the quality ...” (3.3)

Controlling the siting and style of any new tourism development (10.4)

Creating and implementing a visitor management plan (10.2, A10)

Assessment of the natural and cultural resources, their sensitivities (capacity)... (2.7)

Monitoring impact on flora and fauna and controlling tourism in sensitive locations (3.1)

Keeping a record of visitor numbers over time and space (10.1)

Comments:

The indicator “Development Control” is addressed by various Charter Principles and questions.

The Charter takes a more general approach by asking whether and how planning and development are controlled; it requires action to control development and to monitor impacts.

Thus “Development planning, land use planning detailing development and constraint issues of tourism” are not addressed in specific terms.

The subject of a visitor management plan is covered by the Charter. Protected areas are required to assess sensitivities and capacities and to take action managing visitors in sensitive locations.

No specific measurements are suggested.

Suggestions:

Integration of EU measurement 1 with its more specific terms about planning in Charter question 3.3 “Action to control tourism development”

Integration of EU measurement 2 in Charter question 10.2/A10 “Visitor management plan”

Integration of EU measurement 3 in “General information” A5

Indicator 19 “Tourism Supply Chain”

Measurements:

1. Percentage of tourism enterprises sourcing a minimum of 25% of local food and drink produce and products
2. Percentage of local services and goods sourced locally in tourism enterprises
3. Percentage of local tour leaders and guides used within the destination

Charter Principles and questions which address this indicator:

Promoting the purchase of local products (food, crafts, local services) by visitors and local tourism businesses (9.1)

Encouraging the employment of local people in tourism (9.2)

Development of tourism in association with traditional economic activity (9.3)

Part II of the Charter (which works with tourism enterprises) addresses sourcing of local food, drink and services and sets up individual guidelines for businesses that want to join the Charter partnership.

Comments:

The indicator “Tourism Supply Chain” is addressed by a Charter Principle and various questions.

The Charter requires action in the fields of local products and employment.

No specific surveys or measurements are suggested.

Suggestions for the Charter:

Integration of EU measurements 1 and 2 in Charter in the assessment of the local economy (2.8) and in order to survey progress in 9.1 “Promoting the purchase of local products”

Integration of EU measurement 3 in Charter in the assessment of the tourism services (2.9) and in order to measure progress in question 5.6 “Provision of guiding services and an events programme”

Integration of the measurements to develop and survey the implementation of local guidelines for tourism enterprises in the context of part II of the Charter

Integration of the guidance and Enterprises Survey template



Indicator 20 “Protecting and enhancing local cultural identity and assets”

Measurements:

1. Number of cultural and heritage monuments
2. Percentage of residents who believe that tourism is (a) damaging, (b) helps maintain, (c) helps improve the distinctiveness and local identity, culture and heritage of the destination
3. Percentage of residents who believe that tourism is (a) damaging, (b) helps maintain, (c) helps improve the quality of life of local residents in the destination
4. Number of events that are based on traditional culture and local assets

Charter Principles and questions which address this indicator:

Assessment of natural and cultural resources, their sensitivities (capacity) and opportunities for tourism (2.7)

Encouraging activities, including tourism uses, that support the maintenance of historic heritage, culture and traditions (3.2)

Provision/development of tourism offers involving the discovery and interpretation of natural and cultural heritage (6.1)

Development of tourism in association with traditional economic activity (9.3)

Mechanisms for identifying and seeking to reduce any conflicts that may arise (8.3)

Comments:

The indicator “Protecting and enhancing local cultural identity and assets” is addressed by the various Charter Principles and questions.

The Charter covers the indicator in more detail by additionally addressing [tourism products, interpretation, traditional economic activities and tourism uses which support the maintenance of cultural heritage](#).

[No specific measurements are suggested](#).

Suggestions:

Integration of EU measurement 1 in Charter question 2.7 “Assessment of the cultural resources”

Integration of EU measurements 2 and 3 in Charter question 8.3 “Mechanisms for identifying conflicts”

Integration of EU measurement 4 in Charter question 6.1 “Provision of tourism offers involving the discovery and interpretation of cultural heritage”

Integration of the guidance and Residents Survey template

Missing aspects in the EU indicator:

Charter questions (3.2., 6.1)

Tourism products and interpretation in connection with cultural heritage

Traditional economic activities

Tourism uses which support the maintenance of cultural heritage

Optional (destination-specific) indicators

Indicators 21 and 22 are part of the indicator system developed by the EU Tourism Sustainability Group. Since they are optional and destination-specific they were not subject of the test in EDEN destinations.

Indicator 21 “Bathing water”

Measurements:

1. Level of contamination (faecal coli forms, campylobacter)
2. Number of days beach/shore closed due to contamination
3. % of bathing places (beaches, lakes, ...) rated good, acceptable and poor, etc.

Charter Principles and questions which address this indicator:

Action to reduce tourism activities which adversely affect the quality of landscapes, air and water... (3.3)

Assessment of the natural and cultural resources, their sensitivities... (2.7)

Monitoring impact on flora and fauna and controlling tourism in sensitive locations (3.1)

Surveys to measure visitor satisfaction (4.1)

Action to monitor the quality of facilities and services (4.5)

Action to improve the quality of facilities and services (4.6)

Comments:

The destination-specific **indicator “Bathing water” is not explicitly addressed** by the Charter Principles and questions.

Specific measurements as to bathing water and places are not suggested.

However, the Charter requires surveys and action **addressing the quality of tourism facilities and environmental impacts** so it is possible to cover this indicator if it is relevant to the protected area.

No specific measurements are suggested.

Suggestions for the Charter:

Integration of the EU measurements 1 and 2 as destination-specific measurements in context with the assessment (2.8) and survey (3.3)

Integration of the EU measurement 3 in surveys to measure visitor satisfaction (4.1)

Integration of the guidance and Visitors Survey template

Indicator 22 “Destination-specific capacity indicator”

Measurements:

1. Destination-specific indicator to tackle local high-priority stress factors, e.g. water, congestion, etc.



Charter Principles and questions which address this indicator:

Assessment of the natural and cultural resources, their sensitivities (capacity)... (2.7)
Monitoring impact on flora and fauna and controlling tourism in sensitive locations (3.1)
Action to reduce tourism activities which adversely affect the quality of landscapes, air and water... (3.3)

Comments:

A **“Destination-specific capacity indicator”** is not explicitly addressed by the Charter Principles and questions.
However, **capacity, sensitivity and environmental impacts by tourism are addressed** as important issues in the Charter.

Suggestions for the Charter:

The aspect of “specific capacity indicators” could be integrated in context of the assessment, Charter question (2.7)



3 Comparison between EU Sustainable Tourism Indicators and Principles of the European Charter for Sustainable Tourism Conclusions

3.1 The main difference

EU indicators – data for monitoring

The EU indicator system consists of key indicators for which measurements have been defined. The idea behind it is to measure progress in sustainable tourism. In this sense the system is about providing a coherent tool for monitoring. It is about data collection but it does not deal with scores for evaluation. The indicator system is still being tested.

European Charter – illustrating and evaluating evidence of action

Taking the EU indicators as key issues for sustainable tourism which have to be addressed, the Charter with its Principles takes the same approach. The applicant area is required to show evidence of action and to provide information covering all the Principles.

With the detailed questionnaire and evaluation the situation for each of the issues is thoroughly investigated. The Charter requires assessments, surveys and monitoring and the Charter areas have to define indicators to measure the success of their action plan.

However, in comparison with the EU measurements the Charter does not ask for standardized data in most of the cases. The questions leave it open how to illustrate evidence of action in the various issues.

3.2 Coverage of indicators and measurements

In general the issues of most of the EU indicators are well addressed by the Charter Principles and questions referring to them.

Only one indicator “6. Gender equality” is not addressed by the Charter’s Principles and questions; except in the comments in the recently revised full Charter text.

As to the indicators ...

- 09 Climate change
- 10 Sustainable management in tourism enterprises
- 11 Solid waste management
- 12 Sewage treatment
- 13 Water management
- 14 Energy usage
- 16 Lights & noise management

the Charter requires action and addresses aspects in each of the issues. However, more detailed assessments and surveys in these fields are not mentioned.

Moreover, most of the indicators mentioned above are associated with the performance of tourism enterprises which is the main focus of Charter part II, where these indicators could be integrated in the context of enterprises qualifying as partners.

As to the measurements, the Charter generally does not require fixed key figures for data collection. Moreover, under each indicator some measurements can be found which

address additional aspects which are not explicitly mentioned in the Charter's questions though the specific EU indicator is well addressed.

On the other hand, the Charter's Principles and questions cover additional aspects which relate to the EU indicators but are not subject of EU measurements.

Issues which are covered in more detail in the Charter are:

- ◆ Working with partners & involvement
- ◆ Tourism strategy & action plan
- ◆ Communication & information
- ◆ Tourism products referring to the natural and cultural heritage
- ◆ Quality development
- ◆ Economically disadvantaged people
- ◆ Monitoring flora and fauna
- ◆ Visitors' contribution to conservation

3.3 The European Charter's strengths and new opportunities

The Charter approach makes it very flexible in order to react to individual local situations and thus can contain new aspects and approaches. A picture of individual initiatives, solutions and creative projects can be assessed by the Charter's open questions.

Moreover, thanks to the rather comment-orientated evaluation a better understanding of the whole context is achieved.

The Charter's evaluation goes beyond data collection. Guidance, consultancy, motivation and networking are very much part of the whole process to which the areas commit when they apply for the Charter.

Since the Charter understands itself very much as a process-orientated approach more guidance to measure progress is needed and given. The integration of more measurements will be helpful, not only in order to survey development in Charter areas in a shared approach but also to help areas see what kind of information is expected and to make some questions more precise.

3.4 Possible changes to the Charter

General aspects

In order to survey development in Charter areas it will be useful to integrate EU measurements. Possible links are suggested above for each indicator. However, the integration of EU measurements in the Charter needs careful planning and cannot be realized by "copy and paste", especially since the testing in the EDEN destinations showed that the measurements still need development.

The integration of measurements has to be discussed with experts of the TSG and ECST.

One needs to bear in mind that the Charter takes a more in-depth approach which is already much work for the applicant area. There is thus a danger of overloading the evaluation system. It will be essential that the data collection is not "self-fulfilling" but useful to the areas and possible to manage.



Moreover, the character of the Charter with its qualitative approach, motivation and consultancy aspects should be maintained.

It will be essential to define who will be responsible and able to collect the data, to organize it and finding partners.

The next step of testing of the EU indicators will be trying to select measurements and adapt them to the potential of each area. The Charter areas should follow this approach and perhaps some of the Charter areas can be integrated as pilots in the next testing stage.

Specific aspects

In many cases it could be helpful to integrate measurements in order to give further guidance for the Charter's questionnaire and the assessments and surveys required. It would certainly be useful to provide the Charter areas with the guidance and templates for surveys (visitors, residents, enterprises, employees) contained in the EU report and integrate them as a part of the assessment required by the Charter.

To improve coverage of the environmental indicators an additional section on "environmental performance" should be added as a section in the context of the assessment of the natural resources (Charter 2.7)

Evaluation and Scores

The Charter evaluation works with scores. During the BfN-sponsored verifiers' seminar on Vilm in 2009 first steps were taken to define the criteria for minimum, non-awarding and best-practice conditions This work should be finished for the whole of the Charter's questionnaire in order to produce a shared reference for future verifiers.

The experience on Vilm showed that there was general agreement on the scoring values though fixed criteria had not been defined. It could be important to look at the mechanisms which led to this common approach and search for way to maintain it, for example through regular meetings, seminars and exchange of ideas among all involved in the Charter.

APPENDIX

EU indicators	Charter coverage				EU measurements	
	(+/-	-	Connection to Charter II.	Additional aspects in EU measurements	Additional aspects in Charter
1. Tourism Volume and Value	x				x	
2. Tourism Enterprises Performance	x				x	x
3. Customer Satisfaction	x				x	x
4. Community/Social Impact	x				x	
5. Quantity and Quality of Employment	x				x	
6. Gender equality			x		x	
7. Equality – accessibility	x				x	x
8. Reducing Transport Impact	x				x	
9. Climate change		x		x	x	
10. Sustainable tourism management practices in tourism enterprises		x		x	x	
11. Solid waste management		x		x	x	
12. Sewage treatment		x			x	
13. Water management		x		x	x	
14. Energy use		x		x	x	
15. Landscape and Biodiversity Protection	x			x	x	x
16. Lights & Noise Management		x		x	x	
17. Inclusive Management Practices	x				x	x
18. Development Control	x				x	
19. Tourism Supply Chain	x			x	x	
20. Protecting and enhancing local cultural identity and assets	x				x	x
<i>Optional destination-specific indicators</i>						
21. Bathing water		x			x	
22. Destination specific capacity indicator		x			x	
Result	12	9	1	8	22	6



EUROPARC
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SOME OF THE SOURCE MATERIAL USED

BfN/EUROPARC FEDERATION: European Charter for Sustainable Tourism - Verifiers Training Workshop in Vilm 12th to 15th February 2009. Final Report, Summary.

European Commission: "EDEN - Discover Europe's hidden treasures", Brussels 2010.

EUROPARC FEDERATION:

"Application report: framework and guidance", Regensburg 2010

"The Charter", Regensburg 2010

"How to join the journey – a guide for protected areas", Regensburg 2010

"The journey continues – a guide to re-evaluation", Regensburg 2010.

EUROPEAN COMMISSION - TOURISM SUSTAINABILITY GROUP: Indicator system for Sustainable Tourism Destinations. Final draft, 2009.

UNIVERSITAT AUTONOMA DE BARCELONA: Test to implement tourist indicators in EDEN Destinations - Evaluation report. Barcelona 2010.

Website on EDEN: <http://ec.europa.eu/eden>