Identifying challenges and gaps towards sustainable and responsible coastal and maritime tourism in the Mediterranean

MED Sustainable Tourism Community's 1st thematic paper
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1. Introduction

Although accounting for less than 1% of the world's total sea surface, Mediterranean Sea is regarded as lying amongst the most important global biodiversity hotspots, whilst its rich maritime and coastal ecosystems provide a fertile ground for the development of various socioeconomic activities (Marignani et al. 2017). According to a UNEP/MAP Blue Plan Regional Activity Centre report (2010) the value of these ecosystems is believed to exceed € 26 billion annually. Among others, economic activities which rely their development on the exploitation of Mediterranean Sea ecosystem services are fisheries, aquaculture, tourism and maritime transport (UNEP/MAP, 2012). These kind of activities form the so called "Blue Economy" of the Mediterranean Sea whose total Gross Value Added for 2010 is estimated at about €63 billion (EUNETMAR, 2014)[1]. Despite their contribution to the improvement of the region's social well-being, the development of Blue Economy sectors poses serious threats on the coastal and maritime environment (Plan Bleu, 2005; Marignani et al. 2017). The most important pressures on the environment are the pollution caused by contaminants, human-induced eutrophication, marine litter, marine noise, the introduction of non-indigenous species and coastal land take (UNEP/MAP, 2012).

Tourism is amongst the most important maritime and coastal uses of the Mediterranean. The region hosts about 20% of the total global foreign tourist arrivals per year whilst the GVA of tourism is estimated at €25.3 billion, accounting for more than 40% of the total 'Blue Economy' GVA of the Mediterranean (EUNETMAR, 2014). Nevertheless, structural characteristics of tourism, such as seasonality and lack of differentiation, underpin its further potential in revenues and income generation. Moreover, tourism poses important pressures on the environment and is regarded as one of the major drivers of change of the coastal and maritime environment of the Mediterranean (Marignani et al. 2017). In terms of policy, tourism related policy framework could be considered as fragmented in spatial and thematic terms as -up to date- no framework exclusively associated to tourism development exists at the Mediterranean level (Scoullos and Ferragina, 2009; MED-Iamer Project, 2015).

In order to confront the tourism-related socioeconomic, environmental and governance challenges, the Interreg-MED Programme has funded 14 projects during the 1st call of the programming period 2014-2020, under Axis 3.1 "To enhance of a sustainable and responsible coastal and maritime

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[1] Mediterranean region for the present paper includes the following North Mediterranean countries: Cyprus, Greece, Albania, Montenegro, Bosnia-Herzegovina, Croatia, Slovenia, Italy, Malta, France, Spain and Portugal.

tourism in the MED area". These projects, although sharing the common long term objective of enhancing the sustainable and responsible coastal and maritime tourism, are still approaching tourism sustainability through various rationales and are quite diverse in terms of partnership composition, employed methods and spatial focus. Thus, one of the key priorities of the Interreg-Med is the harmonization of the projects' outcomes and results towards a unified valuable input for various policy makers of the Mediterranean.

Under this scope, the present thematic paper codifies the preliminary results of the first thematic working groups which were held during the Thematic Community on Sustainable Tourism Kick-off Meeting organized by BleuTourMed[2] horizontal project in Marseille in 16-17 March 2017. These working groups (WGs) were the first common exercise of the Community's projects in order to create synergies within the Community which could be based on the projects common methods, gaps and challenges. Section 2 follows the general concept of sustainable and responsible tourism in the Mediterranean and explains the approach for the composition of the working groups. Finally, Section 3 discusses the main gaps and challenges and the common issues towards sustainable tourism development as these were identified by the projects during the working groups.

2. Concept and approach

2.1 The role of the Sustainable Tourism Community within the Concept of Tourism Sustainability and Responsibility

According to United Nations Environment Programme and World Tourism Organization (UNEP/WTO, 2005), sustainable tourism could be defined as

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".

In addition, according to the International Conference on Responsible Tourism in Destinations (2002), responsible tourism is about

"making better places for people to live in and better places for people to visit. Responsible tourism requires that operators, hoteliers, governments, local people and tourists take responsibility, take action to make tourism more sustainable."

According to Wheeller (1991), responsibility in the tourism context is translated into a more caring and aware form of tourism. Although the terms 'responsible' and 'sustainable' should not be regarded as synonyms (Mihalic, 2016), responsibility could be considered as a means for achieving a more sustainable tourism (Goodwin, 2011; Mathew and Sreejesh, 2017). To this end, the projects of the Interreg-Med Sustainable Tourism Community are working to enhance responsibility among the

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[2] BleuTourMed is an INTERREG-MED Horizontal project, which aims at supporting and ensuring synergies between the 14 thematic/modular projects selected under the 'Axis 3.1 To enhance of a sustainable and responsible coastal and maritime tourism in the MED area' with the objective of creating a cluster of projects able to enhance jointly solutions for the protection and promotion of natural and cultural resources in the Mediterranean area through a coherent strategy of Community Building, Communication and Capitalisation.

actors of tourism and strengthen -in this way- the sustainability of the Mediterranean tourism. In order for the projects to reach their full potential regarding their contribution towards tourism sustainability, it is important that their particular approaches, the unique structural aspects of tourism they are dealing with and their link to the four pillars of sustainability (society, economy, environment, governance) will be defined in detail. In this context, the community of projects will be able to produce more targeted, and thus concrete and measurable, results whilst identifying more easily any common actions and synergies with other projects (inside and outside the community) of similar methods and objectives.

2.2 The Structural Characteristics of Coastal and Maritime Tourism in Mediterranean

Tourism in the Mediterranean region shows significant dynamics as the tourist flows present positive trends in the recent years. In Figure 1 the annual international tourist arrivals in the Mediterranean is plotted against the international tourist arrivals at the global level for the period 2000-2015. As can be seen from the stats, international tourist flows in the Mediterranean increased by more than 90 million (133 to 225) during the period 2000-2015. This is translated to a 70% increase. At the same period, international tourist arrivals at the global level increased by 76%, and more precisely from 674 million in 2000 to 1,176 million in 2015. The comparison between the Mediterranean and the world shows that the Mediterranean holds a lowest share of the total international tourists in 2015 (18.98%) than this of 2000 (19.67%).

Figure 1. International Tourist Arrivals in the Mediterranean (2000-2015)
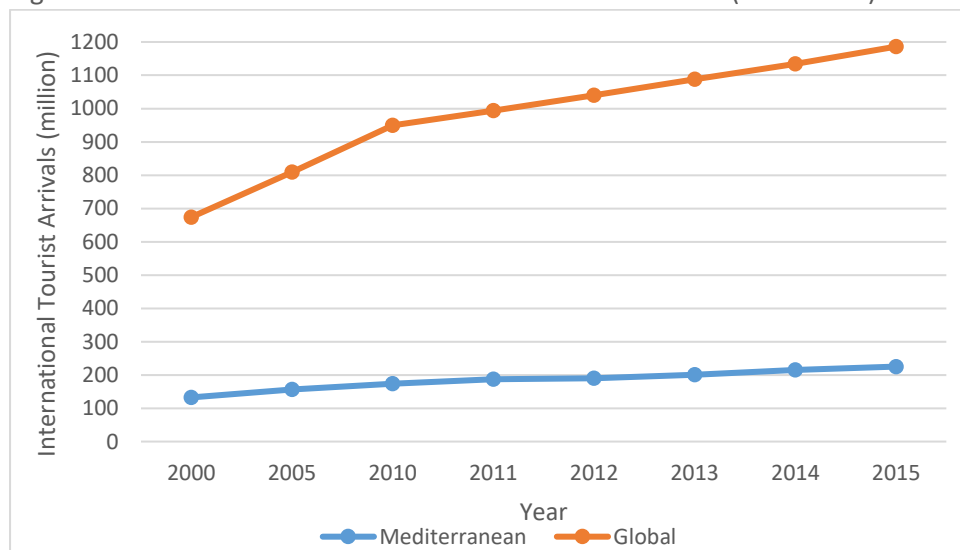
Source: UNWTO, 2016; Own Elaboration

The slight fall of the competitive position of Mediterranean tourism is also testified by the figures of Table 1, where the scores of Travel & Tourism Competitiveness Index (TTCI) (World Economic Forum - WEF, 2017) and the relevant ranking of 11 Northern Mediterranean countries are presented[3]. TTCI is a composite index of the competitive position of countries in the Travel and Tourism sectors,

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[3] Bosnia-Herzegovina figures are not included in the table because data is only available for 2017 and thus the comparisons of average scores and ranking between 2015 and 2017 would be inaccurate. It should be mentioned that for 2017 Bosnia-Herzegovina ranked 113/136 with a score of 3.1.

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consisting of 90 partial indicators which are allocated the four broad factors of *Enabling Environment*, *T&T Policy and Enabling Conditions*, *Infrastructure* and *Natural and Cultural Resources*. In general, the mean rank of the Med countries is 35 out of 136 whereas the mean rank for the EU Med countries is 23. Although the average scores of the Med countries is higher in 2017 than 2015, the relevant ranking of Med as a whole has fallen from 34 to 35. This is also testified by examining the sum of Rank Changes result which denotes that Med destinations lost in total 4 positions within the period 2015-2017. At the country level, Spain and France are the two most Travel & Tourism competitive countries in the world, whilst Italy is also highly competitive, by ranking eighth out of 136 countries.

Table 1. Score and Rankings of Med Countries according to the Travel & Tourism Competitiveness Index (2015 and 2017)

	2017		2015		
Countries	Score	Rank	Score	Rank	Rank Change 2015-2017
Spain	5.43	1	5.31	1	0
France	5.32	2	5.24	2	0
Italy	4.99	8	4.98	8	0
Portugal	4.74	14	4.64	15	1
Greece	4.51	24	4.36	31	7
Croatia	4.42	32	4.30	33	-1
Malta	4.25	36	4.16	40	4
Slovenia	4.18	41	4.17	39	-2
Cyprus	4.02	52	4.25	36	-16
Montenegro	3.68	72	3.75	67	-5
Albania	3.35	98	3.22	106	8
Average Med	4.44	35	4.40	34	Sum of Rank Changes = -4
Average EU Med	4.65	23	4.60	23	

Source: World Economic Forum-WEF, 2015; 2017; Authors Elaboration

The Mediterranean tourism sector shapes its competitive advantage mainly on the exploitation of the rich cultural and natural resources of the region, such as the extended coastline with sandy beaches, the warm climate, the rather low rainfall levels, the clean seas and the rich cultural heritage in terms of monuments, festivals and culinary experiences (Loukissas and Skayannis, 2001; Amelung & Viner, 2006; Farsari, 2012). The strong dependence of tourism on the natural assets is testified by the fact that the tourism related ecosystem services accounts for more than two thirds of the total ecosystem services value of the Mediterranean (UNEP/MAP, 2012). That figure denotes that the majority of ecosystem maritime and coastal services are exploited for tourism purposes. Moreover, according to ECORYS (2013), tourism generated more than 1,5 million direct jobs, accounting for about the half of total coastal and maritime tourism FTE (Full Time Equivalent) jobs in Europe for 2011.

Although important for the improvement of the social well-being, tourism is still lying far from achieving its full potential in becoming the locomotive of sustainable growth and prosperity in the Mediterranean region. This is due to structural shortcomings of the sector which have mainly to do with the dominance of the sun and sea model and the lack of product differentiation and

diversification (Apostolopoulos & Sönmez, 2000; Claver-Cortés, Molina-Azorín, & Pereira-Moliner, 2007). More precisely, mass tourism which is mainly associated with the "sun and sea" and cruise vacations comes up with benefits such as income security and risk reduction for the tourism suppliers as well as better organization and cost saving for the tourists (Loukissas and Skayannis, 2001).

Nevertheless, there is a lot of skepticism regarding the potential of mass tourism and its benefits on the local and national economies. More specifically, the economic sustainability of mass tourism is threatened by factors, such as ageing infrastructure, increased competition from other forms of tourism, larger exposure to competition of other international mass tourism destinations and seasonality (Swarbrooke, 2001; Farmaki, 2012; Bramwell, 2004). In addition, the contribution of mass tourism to the socioeconomic development of the hosting regions is questioned due to the high seasonality, the extensive hotels' land take and the rather low diffusion of benefits to the local economies (Apostolopoulos & Sönmez, 2000; Loukissas and Skayannis, 2001; Bramwell, 2004).

The stagnation of tourist arrivals (see Figure 1) that is being observed in the recent years signifies that maybe mass tourism has reached its full potential as the dominant form of tourism in the Mediterranean and alternative, more attractive tourism products should be built and offered. The rather low attractiveness of the Mediterranean tourism product could be better understood by examining some partial indicators of the TTCI whose score is lower than the general average ranking (34/136) (World Economic Forum, 2015). More precisely, the average ranking of Mediterranean countries in the indicator *Price Competiveness* is 107/136, in the *effectiveness of marketing and branding to attract tourists* is 54/136 and in *Country brand strategy rating* 59/136. All these scores signify that improvements in the offered product are more than essential.

Regarding environmental impacts, tourism generates various pressures on natural ecosystems mainly relating to over-consumption of water resources, land use changes, pollution and waste (Chaline, 2001; Scoullos and Ferragina, 2009). The three dominant forms of tourism (coastal, cruise, recreational) in the Mediterranean are mainly associated with the environmental issues which are presented in Table 2. The cumulative impacts of tourism on the maritime and coastal ecosystems have a double effect on the social well-being of the region as, on the one side, they degrade the quality of the physical and built environment while, on the other side, this degradation in turn affects the future development of tourism and the associated local socioeconomic benefits (UNEP/MAP, 2012).

Table 2. Tourism activities and related environmental issues

Activity	Description	Potential environmental issues
Coastal tourism	Beach tourism, diving, sailing, water and coastal sports	Plant and soil trampling, wildlife disturbance, removal from nature, littering
Cruise tourism	Cruising in open sea, short-term mass tourism in ports of interest	Discharges from cruise vessels in sea and at port, waste, impacts of navigation traffic
Recreational boating and fishing	Leisure navigation, boat chartering and renting, marinas, fishing equipment, licensing (links to coastal tourism)	Wildlife disturbance, exhausts from outboard engines, marine litter

Source: European Environment Agency (2013)

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In addition, climate change poses, through the last decades, as an extremely critical environmental parameter of tourism prospects. According to Satta et al. (2017), a rise of 7–12 cm in the overall level of the Mediterranean Sea, compared to the past decades, is projected by 2050, with more effects observed on the Eastern and Southern Mediterranean coasts. The effects are mostly related to flooding which will increase the vulnerability of low-lying zones and coastal activities submersion and of beaches to erosion along with implications of losses of coastal and marine habitats and ecosystems. In this context, adaptation strategies, based on the assessment of local characteristics and possible impacts as well as socio-economic and environmental vulnerability analyses, are important. Finally, it should be noted that according to the TTCI (World Economic forum, 2015) the average ranking of Mediterranean countries regarding the environmental sustainability indicator was 52/136. Taking into account that this ranking lags 18 positions behind the general ranking (34/136), it can be concluded that the competitiveness of the tourism sector is also characterized by the lack of environmentally friendly practices.

The achievement of a balance between economic growth and environmental protection requires the establishment of integrated policy frameworks which will anticipate the problems imposed by the up to date poorly planned coastal and maritime tourism development in the Mediterranean (UNEP/MAP, 2012). To this end, initiatives such as the Integrated Coastal Zone Management (ICZM) (2002/413/EC) as this is promoted by the Barcelona Convention (Papatheochari et al, 2015), the recent Directive on Maritime Spatial Planning (MSP) (2014/89/EU) (European Commission, 2014a), the Communication "Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe " (European Commission, 2010) and the Communication for "a European strategy for more growth and jobs in coastal and maritime tourism" (European Commission, 2014b) could be regarded as tools for the establishment and implementation of more coordinated and integrated policy actions for sustainable tourism in the Mediterranean.

3. Challenges, Gaps and Synergies within the Community

As indicated above, integrated actions should be taken towards the shift to a more sustainable tourism context. These actions should provide solutions to tourism challenges such as the low levels of product differentiation and diversification, seasonality, lack of branding, environmental degradation and lack of effective management. Having these challenges in mind, the thematic groups of the Thematic Community on Sustainable Tourism Kick-off Meeting were composed on the basis of the three following thematic objectives of the Community.

- WG1 - Enhancing attractiveness and tourism offer
- WG2 - Addressing tourism pressures
- WG3 - Strengthening planning and management practices

Projects were assigned to each group according to their overall and partial objectives which were pre-identified by the Community Building team of BleuTourMed Horizontal project and confirmed by the project leaders. The first priority of the working groups under each thematic was to identify potential linkages and common challenges and gaps among projects in order to set the scene for the development of integrated cross-project actions by bridging science, policy and practice towards the achievement of the Community's objective.

3.1 Challenges and Gaps

During the working groups projects agreed that the target of a more sustainable and responsible tourism is tightly connected with:

- Re-defining tourism practices
- Measuring and assessing tourist behavior
- Improving quality of the tourism product
- Diversifying and differentiating the tourism offer
- Exploiting the full potential of tourism products in a sustainable way creating economic opportunities
- Redistributing of tourist flows/activities and developing new tourism models
- Reducing consumption
- Increasing environmental prevention
- Making use of resources more efficient
- Addressing land-sea interactions
- Enhancing stakeholder involvement and engagement

Tourism is based on the interactions between people (tourists and residents) and destinations and therefore, as a sector, it is sensitive to the social and physical quality of a destination affecting its natural and built elements. In this context, in order to be able to change how tourism activities are taking place actions should be forwarded at both the demand and supply side of the tourism product. Thus, responsible tourism actions are essential in order to promote the increase of quality tourism offer (on the visitor side) and preservation of the quality of life (on the resident side) in a destination (Mohd Hafiz Hanafiah et al., 2017). A critical parameter is the capability of identifying tourist behavior and push it towards a more responsible direction. This is because, tourists could contribute to the reducing of tourism negative impacts through their decisions when choosing a destination and their behavior when visiting a destination. However, existing literature considers that measuring (intended or unintended) sustainable tourist behavior requires, on the one hand, a clear definition of which behavior is considered sustainable and, on the other hand, valid information free from subjective parameters and extremely high cost (Juvan & Dolnicar, 2016).

Moreover, the development of common methods in terms of improving the quality of the tourism product and diversifying the coastal tourism offer in the Mediterranean is a priority in order to achieve a more sustainable tourism model and extend the tourist season. The diversification/differentiation of the tourism product could be expressed through variations in terms of experiences and activities, the increase of potential for customized products that meet tourists' individual needs and interests, adaptability in tourist demands, synergetic arrangements (in terms of coordination and marketing) etc. Diversification in also linked to the promotion of alternative products, which have a more socially and environmentally driven character based on local characteristics and specificities and referring to a more targeted (usually smaller in number) tourist audience (Benur & Bramwel, 2015). Diversification and differentiation could prove to be the keys in exploiting the full potential of tourism products in a sustainable way by creating more economic opportunities and more lasting jobs.

In addition, the reduction of tourism environmental impacts is associated with the challenges of decentralizing tourism flows, employing more efficient resource use practices, reducing consumption, increasing environmental prevention and addressing land and sea interactions. Ecosystem-based management, Integrated Coastal Zone Management and land-sea conservation planning seem to be the most predominant approaches in existing literature as a means to address the preceding challenges (Pittman & Armitage, 2016). These tools promote participation as a means to improve the decision making process. However, the task of involving local and regional authorities and coastal and maritime stakeholders into the planning and management process still remains an important challenge for the promotion of effective governance structures in terms of coordination among different territorial levels (national, regional and local) and mainstreaming research accomplishments and results to policies, especially at the local level.

The process for making tourism more sustainable and responsible could be jeopardized by the following main gaps

- Limited knowledge around tourism issues
- Lack of harmonised data and scarce data at the local scale
- Lack of common understanding of the tourism products among partners or countries
- Lack of cooperation among actors
- Ineffective regulatory and legal frameworks

Unfortunately, lack of data undermines the quantitative and empirical research on critical tourism issues. The main problems concern the data unification across countries and regions as well as the data scarcity observed at the lower spatial levels. Moreover, it renders the support from scientists and academia to the policy makers as inadequate. At the same time, a major gap towards a more sustainable and responsible tourism is the lack of a common understanding of tourism product among Mediterranean countries which leads to fragmented tourism promotion strategies.

The sustainability of tourism is also jeopardized by the lack of cooperation among actors. Even in cases where engagement of stakeholders in the planning process is achieved, the difficulties extend to the lack of a real cooperation among them in order to reach joint actions and promote common strategies. This is also linked to the different mechanisms and policy frameworks put in place among the Mediterranean countries, which follow different regulations. Although important steps have been made in terms of harmonizing the Mediterranean and European policy framework (e.g. ICZM Protocol, MSP Directive) , there are still major barriers for countries to overcome in order to reach a common baseline and a joint future strategy.

3.2 Synergies

Besides the main challenges and gaps, the Sustainable Tourism Community of projects has also identified some common issues on which joint actions could be established. In Table 3 these common issues are presented together with the general objective of each project.

Table 3. Objectives of Projects and Identified Issues for Potential Common Actions

Project	Objective	Diversification of the tourism offer	Enhancement of a common Mediterranean Identity	Deconcentration of tourist flows	Sustainable management models	Effective quality standards	Strategies for extending tourists' stay length	Carrying capacity/ limits of acceptable change	System of tourism indicators	Stakeholders Engagement	Total
		WG1						**WG2**		**WG3**	
ALTER ECO	**Developing alternative tourist strategies in order to enhance the local sustainable development of tourism by promoting Med identity**	x	x	x				x	x	x	6/9
BLUEISLANDS	**Improving waste management and monitoring in Med islands**							x		x	2/9
BLUEMED	**Plan/test/coordinate Underwater Museums, Diving Parks and Knowledge Awareness Centres**				x	x	x		x	x	5/9
CASTWATER	**Improving water management at Med coastal areas**							x		x	2/9
CO-EVOLVE	**Promoting the co-evolution of human activities and natural systems for the development of sustainable coastal and maritime tourism**							x	x	x	3/9
CONSUME-LESS	**Building and promoting a sustainable tourism model based on the "consume-less" notion**	x	x	x				x	x	x	6/9

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DestiMED	Paving the way for the development of a Destination Management Organization for ecotourism in protected areas	x	x	x	x	x	x	x	x	x	9/9
EMbleMatiC	Creating and testing a new and radically different tourism offer based on the features of Emblematic Med mountains	x	x	x	x	x	x		x	x	8/9
MEDCYCLETOUR	Valorising EuroVelo 8 cycle tour towards more sustainable Med tourism	x	x	x						x	4/9
MEDFEST	Promoting culinary tourism based on Med heritage and diet	x	x	x					x	x	5/9
MITOMED+	Improving local and regional strategies and policy actions by to increasing knowledge and social dialogue								x	x	2/9
ShapeTourism	Improving Decision-Making in Tourism by enhancing the tourism knowledge framework	x	x	x	x					x	5/9
SIROCCO	Developing new sustainable cruise tourism models in Med regions	x	x	x	x	x	x		x	x	8/9
TOURISMED	Creating and testing new fishing tourism business models	x	x	x						x	4/9
Total		9/14	9/14	9/14	5/14	4/14	4/14	6/14	9/14	14/14	

According to the discussion among projects in WG1, the diversification of the tourism offer, the enhancement of a common Mediterranean identity and the deconcentration of tourist flows were recognized as being the most important issues towards the improvement of tourism product attractiveness. The three issues were marked as important by nine out of 14 projects. In addition, five projects identified the issue of new and innovative tourism models as a topic on which common actions could be established while four projects observed a potential of common actions towards the development of strategies for extending tourists' stay length and the establishment of effective quality standards.

The attractiveness of a tourist destination could be enhanced by the establishment of branding strategies as well as product standardization, which should take into account the common Mediterranean cultural, physical, climatic conditions along with the unique characteristics of each country and destination (Apostolopoulos & Sönmez, 2000; Gomez Martin, 2005). In addition, diversifying the tourism product with the development of models combined with specific forms of tourism, such as wine tourism, ecotourism and mountainous tourism could ease the pressures generated by mass tourism at certain coastal tourism hotspots. This type of diversification could lead to an extension of the length of tourists' stay and to a reduction of seasonality, increasing by this way the sustainability of tourism at its all dimensions (Hall and Mitchell, 2000; Farmaki, 2012; Benur & Bramwell, 2015).

The projects that have participated in WG2 recognized the environmental challenges of tourism development and addressed a series of common objectives in order to reduce impacts and contribute to a more responsible and sustainable tourism. Eight out of 14 projects recognized the issue of the development of systems of indicators towards tourism sustainability assessment as a major cross-cutting issue whilst six out of 14 projects have recognized carrying capacity in tourism destinations as an issue on which common actions could be established.

The development of systems of indicators to measure tourism sustainability has been an emerging issue examined by several international organisations (e.g. UNWTO, 2004-"Indicators of Sustainable Development for Tourism Destinations", OECD, 2013- "Indicators for Measuring Competitiveness in Tourism", European Commission, 2016- "The European Tourism Indicator System. ETIS toolkit for sustainable destination management"). the Community's Projects agreed that there is a need to operationalize and localize the evaluation directions given by the existing methodological frameworks.

Finally the projects have supported the notion stressed by Coccossis and Mexa (2004) that *tourism carrying capacity assessment entails a challenge for local communities to seek tourism development in an 'acceptable' manner*. In this sense, the projects have highlighted the need for an integrating framework, which will examine the limits of acceptable change.

Finally, the engagement of stakeholders in tourism planning and management processes has been recognized as the emerging cross-cutting issue of WG3. All projects of the Sustainable Tourism Community have included stakeholders' engagement in their operational targets. The establishment of common target groups, the development of integrated stakeholder analyses and the creation of

participatory decision making tools have been identified as subjects of common actions and considerations for the projects.

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