BEST PRACTICE: ANDALUSIA, SPAIN

Key Challenge

Measurement and monitoring of sustainable tourism.

Type of Solution

Adoption of a tourism strategy and monitoring framework; Stakeholder participation and management; Digital solutions; Capacity building.

Case Classification

Type of Destination | Mixed

Territorial Level | NUTS 2

Size of the Tourist Area | 87,597 km²

Population | 8,620,120 in 2023

Type of Tourism | Rural; Coastal, maritime and inland water; Cultural; City.

Tourism organisation | Andalusian Regional Ministry of Tourism, Culture and Sport for policies; Public Destination Management Organisation (DMO) Turismo Andaluz for tourism management and promotion.

Main Stakeholders Affected | Local authorities/ government; ALL tourism service providers; Technology providers; R&D organisations.

Additional Challenges Covered | Growth-oriented mindset; Insufficient use of new and advanced technologies. Appropriate local tourism strategies and policies to accelerate the transition to sustainable and resilient tourism; Lack of knowledge and skills of tourism stakeholders.

Context & Background

Tourism is a very important source of employment (12.3% in 2023) and income (25,337 million euros of direct and indirect economic impact, 13.1% of GDP in 2019) in the region and contributes significantly to the preservation of cultural and natural heritage. In 2023, 34.2 million tourists visited Andalusia and 54.3 million overnight stays in hotels were registered, of which 65.7% were domestic and 26.4% were EU, with much of the tourism activity concentrated along the coast.

Key Challenge

The pressure of tourism on society and nature, as well as the dependence on tourism, has led to a rethink and strong interest in sustainable and resilient tourism practices. New technologies and the measurement and monitoring of sustainable tourism play a key role in this, representing both a solution and a challenge due to their complexity.

Implementation of Solutions: To prevent the negative impacts of tourism, Andalusia has set up an extensive monitoring system that is being further developed in collaboration with other destinations and networks.

SOLUTIONS

- The _Tourism Sustainability Indicator (TSI) Pilot project_ defines a policy-oriented common set of destination indicators to measure and monitor tourism sustainability, in order to align it with the Tourism Transition Pathways, the EU Green Deal, the EU Climate Law and the Sustainable Development Goals.

- Diverse tourism datasets, including both conventional statistical data and data from private providers (e.g. booking systems, accommodation listings) will be integrated to create a unified and standardised set of sustainability indicators to be used in the destinations. The project is carried out within the framework of the Spanish Tourism TSI project together with Catalonia, Navarra and Valencia, with the support of the OECD and the NECSTouR Tourism of Tomorrow Lab from 2021 – 2024.

- _"Smart Data"_ platform for companies that, since 1997, with the support of Turismo Andaluz, has published pooled data on sustainable tourism from various sources and made it available to all interested parties for decision-making.

- _Covid-19 crisis management dashboard_ provided by the regional government to guide policy actions in response to the COVID-19 crisis. Data updated weekly includes economic impact analysis, data on flight searches, reservations and airline seat capacity, as well as weekly opinion polls of accommodation providers, sentiment analysis and social listening, and a consumer confidence indicator for key origin markets in the EU and Spain.

- Tourismo Andaluz is constantly striving to learn and share knowledge and experiences. In addition to leading the Digital Transformation Subgroup of the _"Together for EU Tourism (T4T)" Expert Group_, they _collaborate in a number of international projects_, including:
  - _MITOMED+,_ an Interreg MED project on measuring sustainability at local level involving more than 15 destinations across MED Europe implementing data-driven destination management models.
  - _UNWTO Working Group_ on Measuring Sustainable Tourism and Committee on Statistics and Tourism Satellite Accounts.
  - _NECSTouR_, a network of European regions for sustainable and competitive tourism that develops interregional projects and promotes cooperation for sustainable tourism management.

Replicability potential: High (requires significant financial and human resources, strong political will, leadership and cooperation).

Cost & funding source: TSI Pilot project funded by the European Commission (DG REFORM); "Smart data" funded by the regional government and the European Regional Development Fund (ERDF); Covid-19 crisis management dashboard funded by the regional government.

Success Factors & Barriers

Success factors: Collaboration in networks with other destinations and regional statistics office; Political will to make data understandable for policy makers; Close collaboration with the different policy departments; Sufficient financing through continuous persuasion to invest in measurement systems; Sharing the same vision for tourism with stakeholders.

Barriers: Change of policy makers every four years (elections); Complexity of the data (lack of harmonised methodologies and data gaps on social and environmental impacts of tourism; difficulty in making it easily understandable for users); Constraints of financial and human resources; Difficulties in integrating smaller companies into the process.

Results and Impacts

- The culture in the organisation has changed, with an increased awareness of the importance of data.
- Now, policy makers make their recommendations and decisions based on data analysis.
- During the pandemic, it was crucial to use data to analyse what and how to restore the tourism sector.
- The development of tourism in Andalusia is no longer measured only by the number of tourists, but takes a broader approach with various sustainability indicators, such as water and energy consumption, accessibility, certified establishments and others.

Recommendations by the Destinations

- Collaboration is important to improve sustainability and data management because challenges such as climate change cannot be solved individually.
- Get inspiration and learn from other destinations (think outside the box of your destination).
- Communicating data is almost as important as working on the technical part.

Useful Links

European projects

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