

Interreg
Mediterranean



ShapeTourism

EVALUATION TOOL AND SCENARIOS MAPS



FORWARD NOTE

Intermediate deliverable of the activity

CREDITS and DISCLAIMER

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Summary for public dissemination

The ShapeTourism project seeks to develop a Smart Integrated Tourism Data System (SITDS) for monitoring the dynamics of tourism development and assessing the ongoing sustainability of tourism in Mediterranean coastal regions, as well as supporting decision-making processes using scenarios maps of tourism trends. This system is an online, interactive and user-friendly tool that facilitates data visualisation.

The SITDS provides support to private and public stakeholders who need to make the best business and management decisions in Mediterranean regions as quickly as possible based on reliable data. The primary data supporting this tool were collected through a transnational survey. In addition, this tool relies on secondary data published by Eurostat.

In the second half of 2017, the ShapeTourism research team launched a comprehensive survey of a population of 9,000 tourism-related stakeholders from nine countries of the MED area (i.e. eligible regions of the MED Cooperation Programme 2014–2020). Based on this survey, we were able to compile stakeholders' perceptions of tourism dynamics and trends and these stakeholders' reactions to global trends in tourism sustainability. This survey's results also provide insights into both sustainability practices in tourism development and challenges to the adoption of sustainable tourism practices in the coming years. We further surveyed public and private stakeholders on their perceptions of their destinations' life cycle stage to find out how closely aligned stakeholders' assessments are with tourism areas' actual life cycles.

Users of the SITDS tool can thus pull up the survey's results on a number of issues such as tourism dynamics and trends in each region, local reactions to global trends and/or challenges in tourism sustainability, perceptions of destinations' life cycles and tourism externalities at an economic, social and environmental level. In addition, users can visualise the impacts of a set of scenarios of tourism demand and offer on the carrying capacity of MED regions.

This work is in its first stages because, with the uniform and comparable information available in the SITDS, we plan to set up discussions and help destination leaders and planners develop their own approaches and lay out the best path forward. The usefulness of the information published in the SITDS will only be as important as the extent to which stakeholders are willing to identify and face the barriers that may prevent destinations from becoming more sustainable.

These stakeholders' decision-making processes are complex, and they can only make better decisions with reliable information about different dimensions of analysis. We believe, therefore, that our tool's contribution has added value because it can help destinations' stakeholders begin to meet global challenges with more sustainable tourism development planning.

If you would like more information or have any feedback or questions, please feel free to contact us. On behalf of the ShapeTourism research team, we would like to thank the approximately 500 survey respondents who generously gave their time to contribute to this study. Without their insights, this research would not have been possible.



1. Evaluation tool

Authors: PP1 – University of Algarve

1.1. Introduction

The ShapeTourism project focuses on developing the SITDS to monitor the dynamics of tourism development and assess the ongoing sustainability of Mediterranean coastal regions, as well as support decision-making processes using scenarios maps of tourism trends. This system is an online tool facilitating data visualisation.¹ This user-friendly tool provides support to private and public stakeholders who need to make the best business and management decisions in the MED region as quickly as possible based on reliable data.

In order to achieve the project's goals, a sample survey was conducted across a wide range of MED regions. The specific objectives of this survey were as follows:

- a) To identify tourism dynamics and trends in each region
- b) To evaluate local reactions to global trends and/or challenges in tourism sustainability
- c) To compare the destination life cycles of the MED regions surveyed
- d) To analyse tourism externalities at an economic, social and environmental level

This project also seeks to stimulate public and private tourism stakeholders' adoption of plans for more sustainable and responsible coastal and maritime tourism development based on information generated from a participative decision support system. Thus, we decided to collect stakeholders' opinions, practices and needs regarding sustainable tourism development through this survey. The survey also aimed to achieve the following objectives:

- e) To evaluate the level of implementation of sustainability practices (i.e. economic, environmental and social) by private tourism stakeholders
- f) To identify the main barriers to adopting sustainable tourism practices for private tourism stakeholders
- g) To assess public tourism stakeholders' opinions on if i) tourism development respects sustainability and ii) tourism operations meet sustainability standards

In summary, the ShapeTourism Transnational Survey (i.e. ShapeSurvey) is an academically-driven cross-national survey, designed and implemented in 2017 by the ShapeTourism Project's research team. The core scientific team comprises the project members at the University of the Algarve, but all the project partners

¹ Data visualisation is the visual and interactive exploration and graphic representation of data of any size, type (i.e. structured and unstructured) or origin. Visualisations help individuals see things that were not obvious to them before. Even when the volume of data is extremely large, patterns can be spotted quickly and easily. Visualisations convey information in a universally understandable manner, so they make sharing ideas with others simple.



contributed to the ShapeSurvey's design and implementation.

The present document – with the short title of 'Evaluation Tool and Scenario Maps' – outlines the tasks and responsibilities of the University of the Algarve regarding both the design and implementation of the transnational survey of relevant tourism-related stakeholders and the development of a set of scenario maps of tourism trends in the MED region. This text supports the deliverable with the same name.

1.2. Survey profile and key tasks

The ShapeSurvey sought to ensure optimal comparability and standardised approaches across countries. Key characteristics of the survey profile were as follows:

- Rigorous identification and enumeration of tourism-related stakeholders, ensuring that the target population adequately represented all MED countries
- Innovative and extensive questionnaire design and translation procedures followed by a thorough assessment aiming for optimal comparability across countries
- Standardised fieldwork approaches with a strong emphasis on invitation and call-back procedures and extensive monitoring of fieldwork progress, thus ensuring optimal comparability across countries
- Provision of support to interviewees through country-specific contacts
- Adherence to international quality and ethical procedures
- Submission of survey data to rigorous processing and adherence to national and European data protection regulations
- Free and equal access to data and metadata for non-commercial use

Members of each country's project team worked with the ShapeSurvey project partner coordinator to accomplish the following tasks:

- Definition of the target population's profile
- Participation in questionnaire development, translation and pre-tests
- Provision of a sampling frame of each country
- Preparation and monitoring fieldwork in collaboration with the activity coordinator
- Dissemination of the survey findings to local stakeholders

Apart from tasks of each partner, the project partners' activity coordinator had the following tasks:

- Coordination of questionnaire development, translation and pre-tests



- Harmonisation of the overall sampling frame
- Preparation of a survey platform for data collection and storage
- Introduction of the questionnaire in eight different languages in the survey platform
- Upload of 10 country sampling frames to the survey platform
- Oversight of a global pre-test
- Coordination of fieldwork resulting in a sufficient (i.e. effective) sample size and agreed-upon response rate
- Overall preparation, management and monitoring of the survey fieldwork
- Development of the tool's architecture for data visualisation
- Coordination of survey data processing and pre-estimation procedures
- Preparation of the survey data file for public use

1.3. Methods

1.3.1. Transnational survey highlights

We conducted a sample survey covering a wide range of MED regions. In this sample survey, we started by collecting stakeholders' opinions, practices and needs regarding sustainable tourism development. The population comprised private, public and other key tourism stakeholders of the relevant regions.

Although none of the survey partners were from France, we decided to include France in the Web survey since France is an important MED region. We also decided to include Malta in the survey. Thus, the survey covered 9 countries, including 6 countries of the 7 project partners (i.e. Italy, Portugal, Croatia, Cyprus, Slovenia and Spain), as well as France, Greece and Malta.

Data were collected through a self-administrated Web questionnaire, and respondents were invited via email. The data were collected in two waves: one from May to July 2017 and the other from September to November 2017. The first wave included Portugal, Spain and Malta. The second wave covered the first three countries again and added France, Italy, Cyprus, Greece, Slovenia and Croatia. In each wave, three reminders were sent to maximise the number of responses. In all, invitations were sent to 9,128 stakeholders from the 9 countries. The final sample was 474 stakeholders from 8 countries (Malta: 33; Spain: 37; France: 35; Croatia: 133; Italy: 50; Portugal: 111; Slovenia: 68; and Cyprus: 7).

After an extensive review of the literature on tourism dynamics and trends, local reactions to global trends in tourism sustainability, destination life cycles, tourism externalities and sustainable tourism development, we designed a questionnaire that included 13 questions. These included five questions about personal and



institutional characteristics. We then asked for and received the other partners' input. The final questionnaire included their suggestions.

1.3.2. Questionnaire

The aforementioned literature review helped identify the most important information and variables that needed to be included in the questionnaire. This review was the basis of the questionnaire developed by the University of the Algarve, which was composed of five sections: (i) personal and organisational characteristics, (ii) tourism dynamics and trends, (iii) local reactions to global trends in tourism sustainability, (iv) destination life cycles and (v) tourism externalities. The following subsections list the variables included in each section.

Personal and organisational characteristics

- Region
- Age
- Gender
- Education
- Number of years of experience in the tourism industry
- Type of key stakeholder
- Role in the organisation in question
- Level of the organisation's operation

Tourism dynamics and trends

- Identification of three main competitors for each region
- Expressed level of agreement with nine statements, keeping in mind each region as a tourism destination and reflecting on the period from 2014 to 2016
 - Investment
 - Creation of jobs and/or recruitment
 - Increases in demand and offer
 - Diversification of tourism offer
 - Decreases in prices



- Marketing efforts
- Promotion of new markets and/or segments
- Distribution channels

Local reactions to global trends in tourism sustainability

- Expressed level of agreement with 10 statements
 - Ability to deal with the entry of new competing destinations
 - Capacity to deal with terrorist threats
 - Competence to ensure environmental sustainability
 - Ability to ensure social sustainability
 - Capacity to take advantage of big data
 - Skill in using digital marketing channels
 - Capability to meet individuals' growing concerns about health and wellbeing
 - Competence to face climate change
 - Ability to ensure economic sustainability
 - Facility in taking advantage of the collaborative economy

Destination life cycles

- Identification of destinations' current life cycle stage according to the stakeholders' perceptions

Tourism externalities

- Expressed level of agreement with 11 statements concerning tourism's positive impacts
 - Jobs for residents
 - Increased income
 - New markets for local products
 - Benefits of other economic activities
 - Development of infrastructure
 - Preservation of the natural environment
 - Conservation of cultural heritage



- Increased number of cultural events
- Preservation of socio-cultural authenticity
- Improved quality of life for residents
- Encouragement of cultural exchange
- Expressed level of agreement with 11 statements concerning tourism's negative impacts
 - Increased prices
 - Rising real estate values
 - Exclusion of other economic activities
 - Long-term negative effects on the environment
 - Water pollution
 - Other types of pollution
 - Overdevelopment
 - Overcrowding
 - Overuse of natural resources
 - Crime
 - Strong pressure on land use and loss of aesthetic landscape values

Sustainability of tourism development

- Private stakeholders
 - Sustainability practices incorporated
 - Barriers and challenges
- Public stakeholders and/or civil society organisation
 - Tourism development's respect for sustainability
 - Tourism operations' adherence to sustainability standards

The questionnaire included Likert-type scale, item-category and quantitative measurement scales. The survey was distributed in eight languages: English, Italian, Portuguese, Spanish, French, Croatian, Slovenian and Greek. The questionnaire was initially developed in English, and each partner provided a translation into their own language. Specialised translation services were used to translate the questionnaire to French. The questionnaires in the eight languages are included in an appendix.



1.3.3. Technology topics

The transnational survey was distributed via LimeSurvey 2.65 because this is:

- Open-source software
- Compatible with a variety of mobile devices including iOS and Android
- Supportive of surveys in multiple languages

The database server used was MySQL 14.14, and the operating system was Linux Ubuntu 16.10. Apache 2.4.18 with PHP 5.6.30 software was also used.

1.3.4. Stakeholders' sampling frame

Each partner collaborated to implement the survey in a small number of MED regions (i.e. NUTS 3 level). In order to distribute the ShapeSurvey online, a sampling frame of key tourism stakeholders with their email addresses was used for each MED region selected. Thus, each partner (i) identified two or three MED regions (i.e. NUTS 3 level) in which they planned to distribute the questionnaires and (ii) prepared the sampling frame of key tourism stakeholders with their email addresses for each MED region selected.

To expand the stakeholders' database for each MED region included in the transnational survey and, therefore, maximise the sample size, we decided to supplement the Spanish database. As a result, the Portuguese team prepared the following databases: Portuguese, French and Maltese stakeholders and the abovementioned supplemented Spanish database.

Table 1 shows the project stakeholders' database by country, including private and public stakeholders. This table also presents the number of MED regions covered by country at the NUTS 2 and NUTS 3 level and the average number of stakeholders at the NUTS 3 level.



Table 1: Distribution of stakeholders

MED country	Number of MED regions covered (at NUTS 2 level)	Number of MED regions covered (at NUTS 3 level)	Number of stakeholders	Average number of stakeholders (at NUTS 3 level)
Croatia	2	3	831	277
Cyprus	1	1	553	553
France	2	4	1.242	311
Greece	1	3	177	59
Italy	3	62	1.500	24
Malta	1	2	500	250
Portugal	3	7	1.525	218
Slovenia	2	2	1.098	549
Spain	2	7	1.756	251
Total	17	91	9.182	101

1.4. Smart Integrated Tourism Data System (SITDS)

1.4.1. Architecture of the system

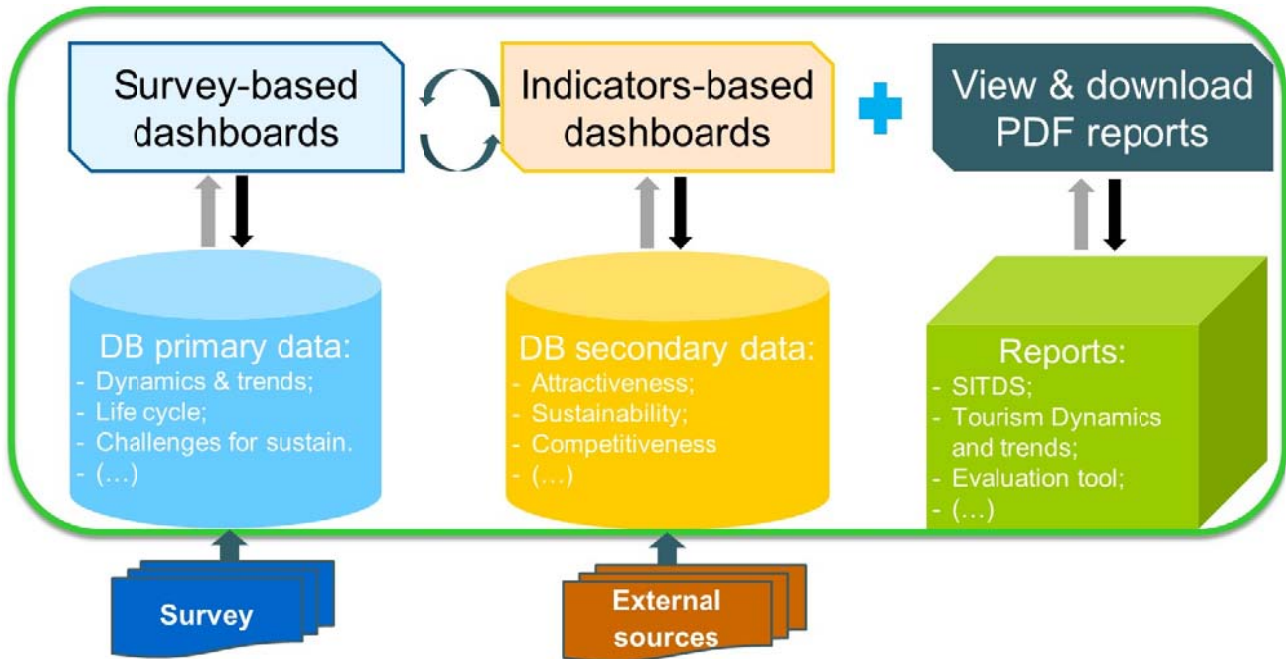
The University of the Algarve designed the architecture of Output 01 – SITDS. This is a tool for monitoring the dynamics of tourism development and assessing the state of MED regions' sustainability in terms of tourism. SITDS integrates the results of the transnational sample survey conducted by the University of the Algarve and secondary data (i.e. Eurostat, European Spatial Planning Observation Network [ESPON] and World Economic Forum [WEF]) collected by the University of Venice in Activity 3.1 through a smart tourist data gathering and processing system.

The SITDS has two types of dashboards and a repository of reports in Portable Document Format, as shown in Figure 1. One dashboard is fed by a database of secondary data (i.e. indicators of attractiveness, sustainability and competitiveness), while the other dashboard is fed by a database of primary data from the



transnational survey. Both dashboards of the decision support system are dynamic, producing results (e.g. relative frequencies and descriptive measures) according to users' choice of visualisation variables (e.g. country).

Figure 1: Architecture of Participative Decision Support System: SITDS

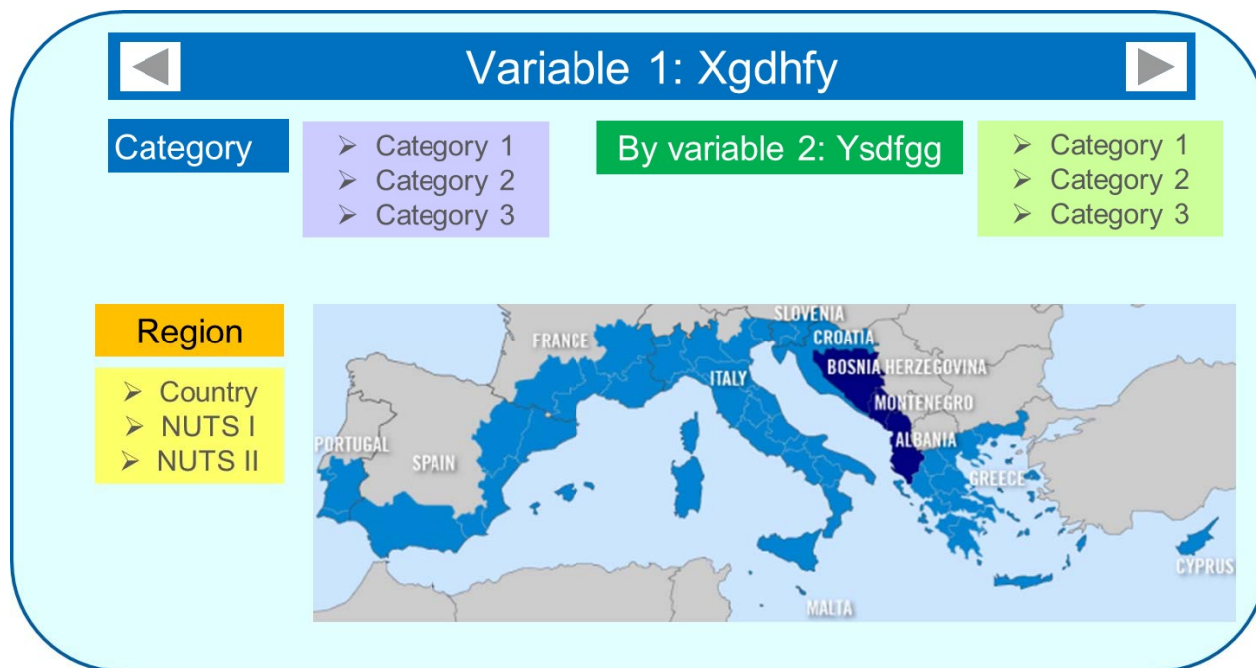


The SITDS has the following three characteristics. First, the system is fed by a database with a rectangular format (i.e. ~100 rows per ~100 columns), including indicators of attractiveness, sustainability and competitiveness. Second, SITDS is supported by another database with a rectangular format (i.e. ~1000 rows per ~100 columns), obtained from a transnational survey (i.e. 9 European countries). This database's contents are used to produce and present statistical information in the form of tables, charts and maps of the MED area's European countries (i.e. NUTS 2 level). Last, the system includes a repository of reports that can be viewed and downloaded.

At the moment, the dashboard that includes the external sources, that is, the secondary data (i.e. Eurostat, ESPON and WEF) defined by the University of Venice in Activity 3.1, can be accessed in a demo version at <http://www.shapetourism.eu/main-output/shapetourism-observatory/>. Figure 2 shows the key navigation and visualisation system of the architecture of the SITDS dashboard that includes the transnational survey results.



Figure 2: Architecture of SITDS's survey-based dashboard

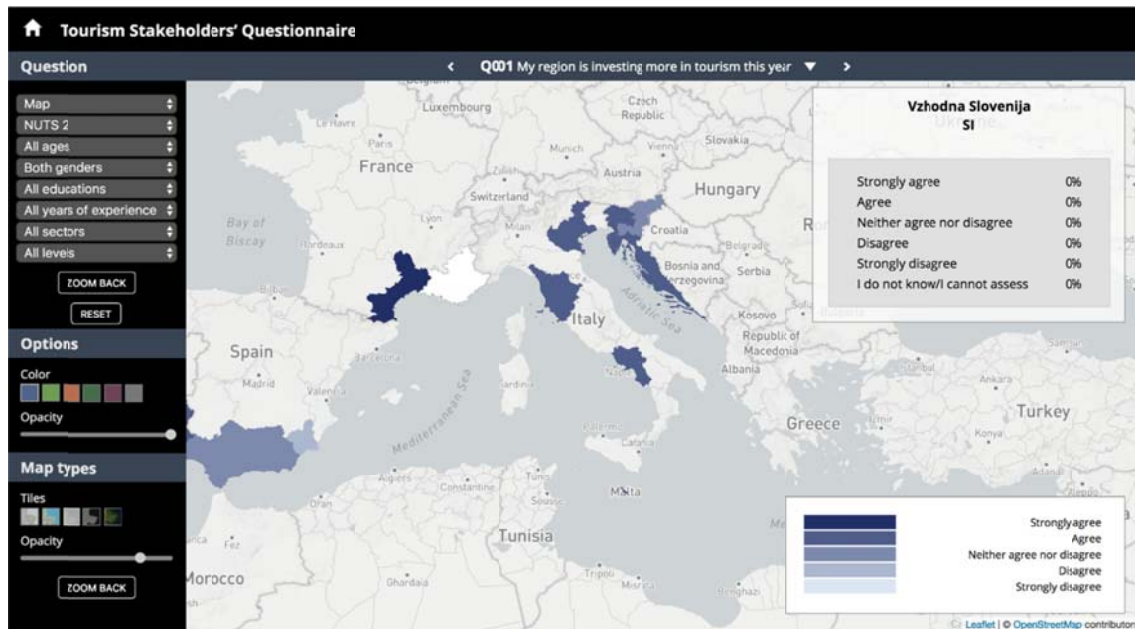


The dashboard that includes the results of the survey conducted by the University of Algarve can be accessed in a demo version at <http://exchanges.dataspritz.it/med/build-algarve/map.php?data=algarve>. The following pages summarise the most important points of the evaluation tool, namely, the SITDS dashboard that includes the transnational survey results.



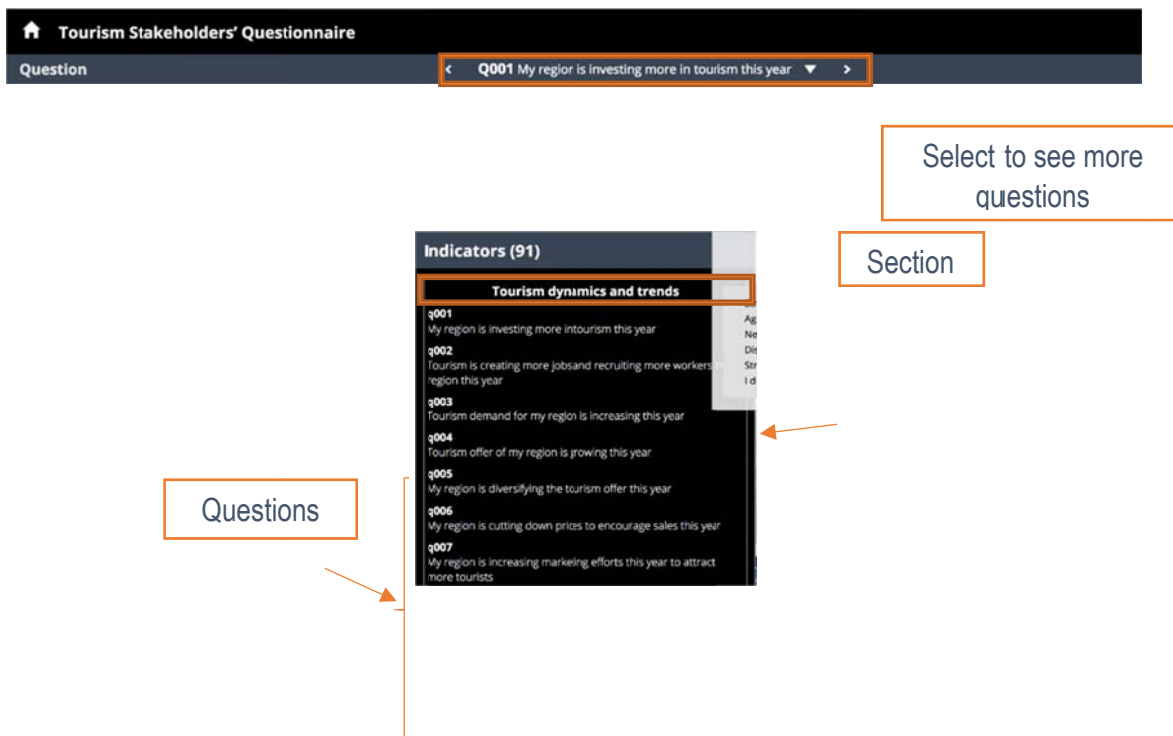
1.4.2. Survey tool highlights

This page presents the results of the transnational survey (i.e. the Tourism Stakeholders Questionnaire).



The questionnaire seeks to identify regional dynamics and trends affecting the MED area, as well as evaluate the impacts that global changes may have on sustainable tourism development. The questionnaire is divided into six sections. The first section includes questions about personal and organisational characteristics. The second focuses on tourism dynamics and trends. The third has questions about local reactions to global trends in tourism sustainability. The fourth section is about destination life cycles. The fifth focuses on tourism externalities, while the last section includes questions about the sustainability of tourism development. The last section is subdivided into two sectors: private and public stakeholders. The questions can be selected here, and information is available about related subjects.



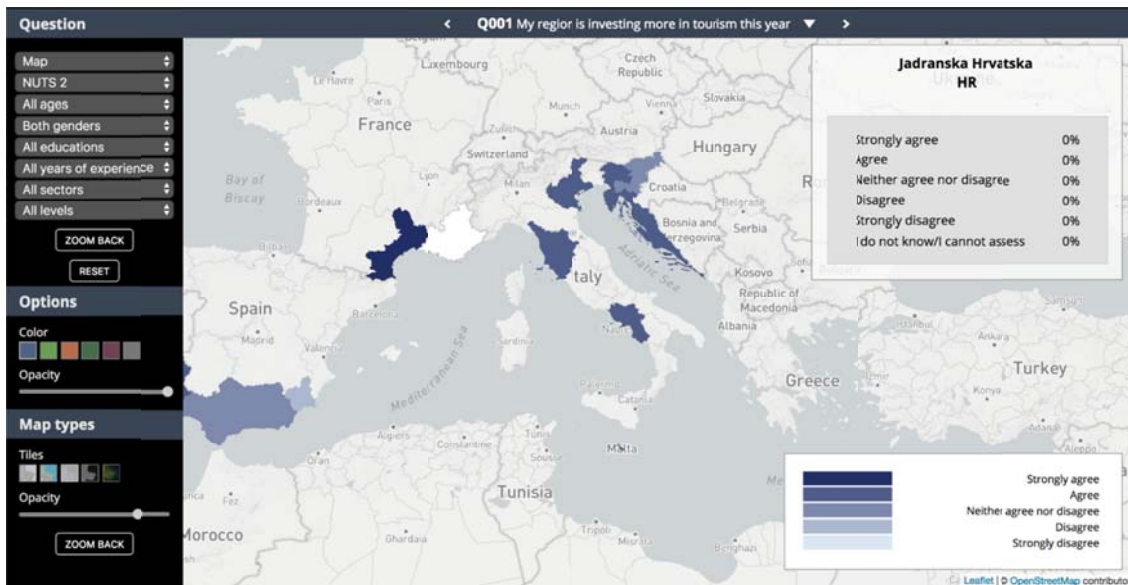


The characterisation variables can be selected on the left side of the homepage. Although six variables are available, only a maximum of two variables can be selected at a time. The results refer to the NUTS 2 or NUTS 3 level, and the data can be presented in two different formats: maps or charts.

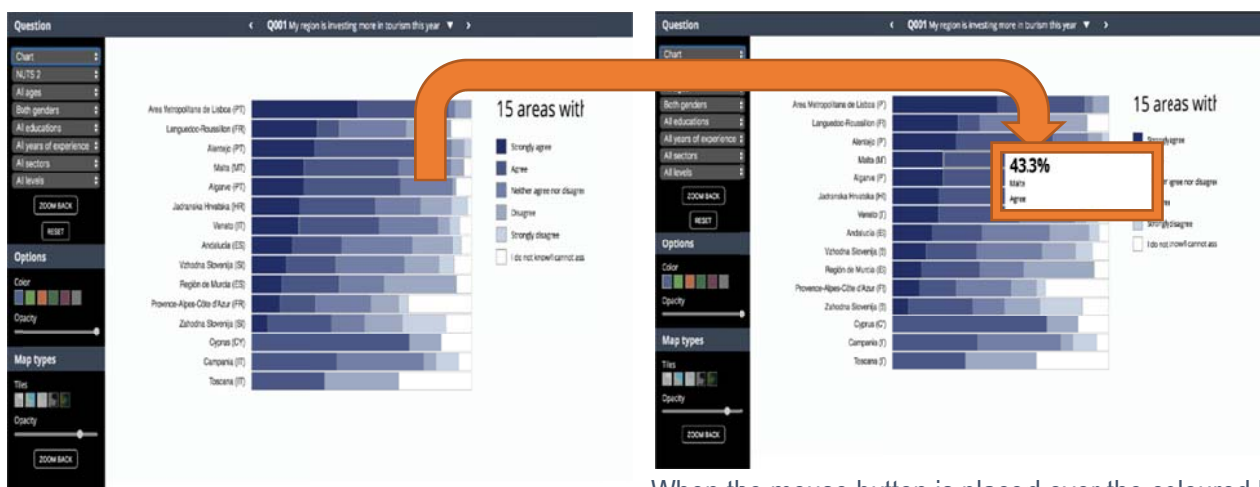


If the map presentation is chosen, the mouse button can be placed over the coloured region to gain access to the information about the selected question.

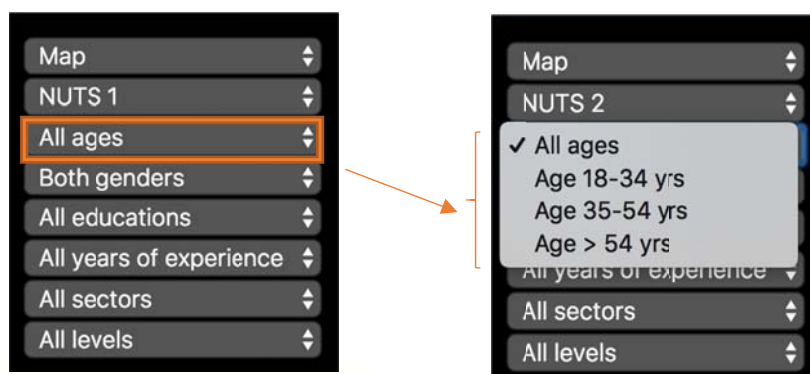




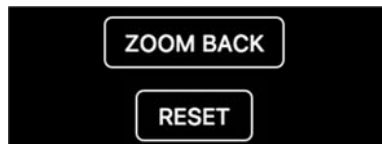
If the chart presentation is chosen, the mouse button can be placed over the coloured bars to access the same information.



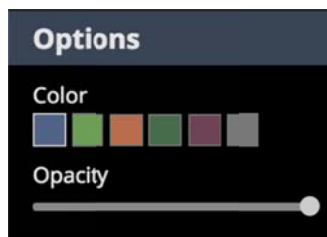
When the mouse button is placed over the coloured bars, a visualisation is presented that highlights the percentages by response, region and degree of agreement. All six characterisation variables have several options that can be chosen according to what needs to be visualised.



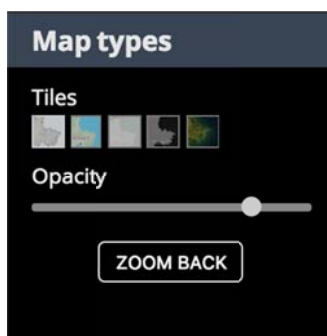
The selection process of the characterisation variables can also be reversed to return to the initial situation by choosing one of these buttons.



The results are presented in graduated colours that can also be chosen from the following options for both maps and charts.

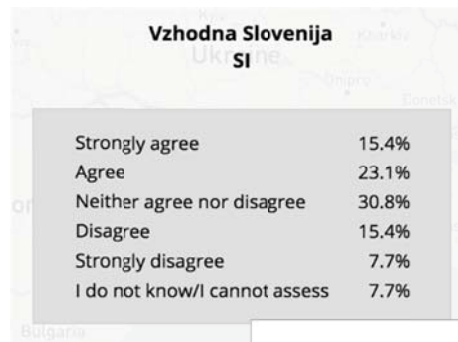


When presenting the results in the map format, map presentation can be controlled on the homepage by choosing from among the five available options.

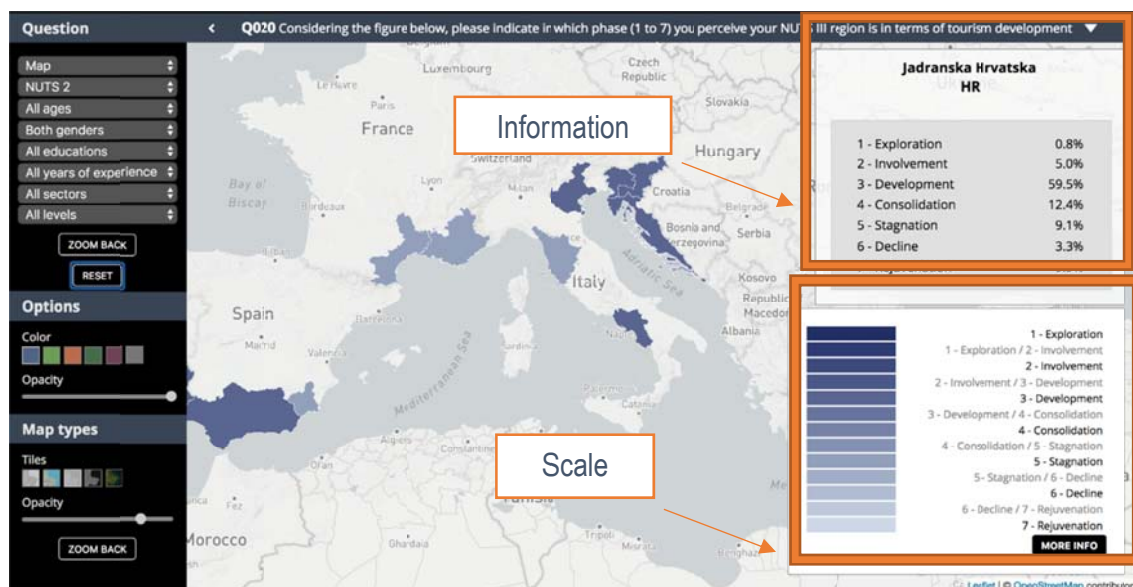


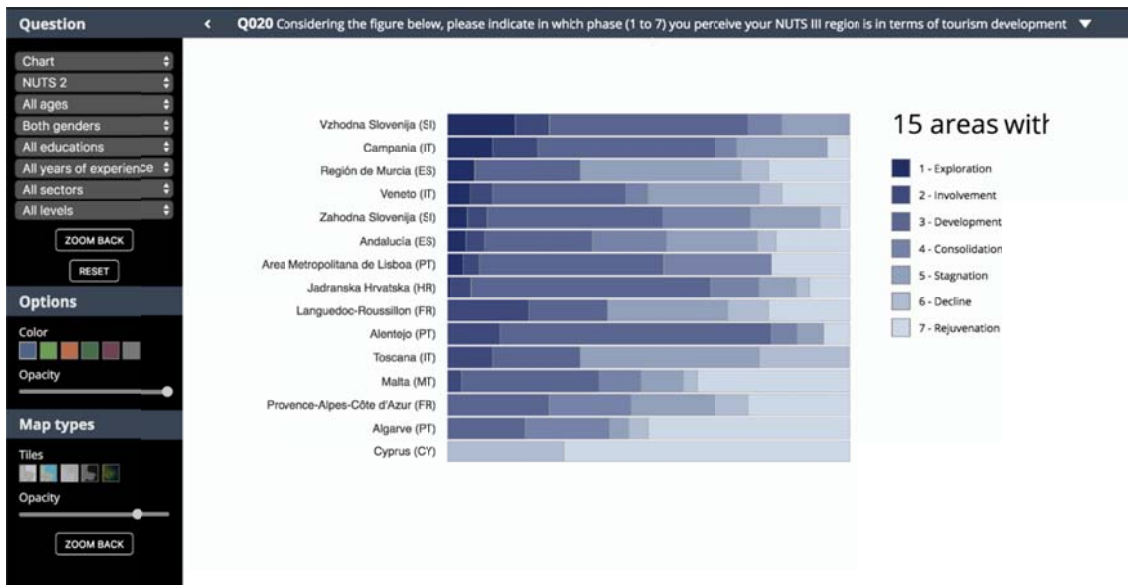
The results can be viewed after selecting a question from the 91 items available, along with a maximum of two characterisation variables. At this point, a scale of agreement-disagreement, in which the darkest colour represents strong agreement and the lighter strong disagreement, is presented along with the selected question. When the mouse button is placed over the coloured regions, the percentages relative to the other agreement levels in between are shown.





Although most of the questions in this questionnaire use a scale of agreement-disagreement, some questions use different response options. For example, the fourth section focuses on destination life cycles and thus presents another type of response scale. The means of access to the information is the same, but, in this case, the darkest colour represents the exploration phase and the lighter colour the rejuvenation phase.



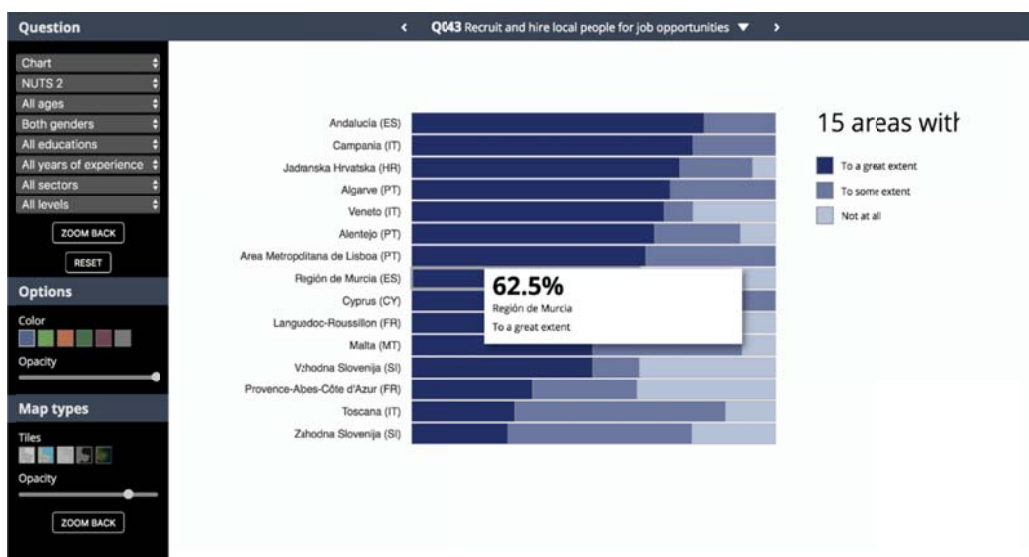


Below the legend of the destination life cycles is a button with which the life cycle graph or each region can be viewed in order to understand better the concept of destination life cycles.



In the questionnaire's sixth section, the darkest colour represents a quite extensive incorporation of sustainable practices and the lighter colour refers to the non-incorporation of any sustainable practices.





1.5. Sample profile

The next pages present a summary of the sample's main characteristics revealed by the survey. Table 2 shows the distribution of the sample by NUTS 2 regions. Most respondents are from Croatia (28.1%), and the smallest group of stakeholders is from Cyprus. Portuguese respondents represents a considerable percentage due to the number of tourism organisations based in the Algarve. Understandably, the number of organisations is always higher in coastal areas than in non-coastal areas. This distribution can be explained by traditional forms of tourism based on sun and beach. The remaining values can be accounted for by the growth of rural tourism in the case of such regions as the Alentejo.



Table 2: Regions in which organisations are located

NUTS II region / country	%
Alentejo	7,0%
Algarve	10,3%
Área Metropolitana de Lisboa	6,1%
Portugal	23,4%
Andalucia	4,6%
Spain	4,6%
Campania	4,4%
Toscana	1,9%
Veneto	4,2%
Italy	10,5%
Jadranska Hrvatska	28,1%
Croatia	28,1%
Kypros	1,5%
Cyprus	1,5%
Languedoc Roussillon	2,3%
Provence Alpes Cote d'Azur	5,1%
France	7,4%
Malta	7,0%
Malta	7,0%
Region de Murcia	3,2%
Region de Murcia	3,2%
Vzhodna Slovenija	3,2%
Zahodna Slovenija	11,2%
Slovenia	14,4%

As can be seen in Table 3, the stakeholders' mean age is similar across regions. However, Toscana (Italy) presents the highest mean age, and Jadranska Hrvatska (Croatia) has the lowest mean age.



Table 3: Descriptive statistics of stakeholders' age

NUTS II Region	Mean	Maximum	Minimum	Standard Deviation
Alentejo	45	72	25	12
Algarve	45	65	27	8
Andalucía	45	64	25	10
Área Metropolitana de Lisboa	47	68	32	11
Campania	47	77	26	13
Jadranska Hrvatska	40	64	22	10
Kypros	51	64	33	11
Languedoc Roussillon	52	71	23	13
Malta	42	65	24	12
Provence Alpes Cote d'Azur	47	72	26	11
Region de Murcia	48	71	28	11
Toscana	55	76	26	16
Veneto	48	75	28	14
Vzhodna Slovenija	46	65	24	13
Zahodna Slovenija	48	70	25	11

The stakeholders' gender is presented in Table 4. The majority of stakeholders are women in almost all regions. The exceptions are the Área Metropolitana de Lisboa (Portugal), Jadranska Hrvatska (Croatia), Provence Alpes Cote d'Azur (France), Region de Murcia (Spain), Toscana (Italy) and Vzhodna Slovenija (Slovenia).

Table 4: Stakeholders' gender

NUTS II Region	Gender	
	Male (%)	Female (%)
Alentejo	36,4%	63,6%
Algarve	49,0%	51,0%
Andalucía	40,9%	59,1%
Área Metropolitana de Lisboa	51,7%	48,3%
Campania	42,9%	57,1%
Jadranska Hrvatska	58,6%	41,4%
Kypros	42,9%	57,1%
Languedoc Roussillon	45,5%	54,5%
Malta	33,3%	66,7%
Provence Alpes Cote d'Azur	33,3%	46,7%
Region de Murcia	53,3%	46,7%
Toscana	66,7%	33,3%
Veneto	50,0%	50,0%
Vzhodna Slovenija	66,7%	33,3%
Zahodna Slovenija	47,2%	52,8%



Table 5 shows the stakeholders' education levels. Most stakeholders have a bachelor's, master's or doctoral degree across all regions. However, in Toscana, the number of stakeholders with only a high school education is slightly higher than those with a higher degree. The number of stakeholders with an elementary school education is zero or practically zero in all regions.

Table 5: Stakeholders' education levels

NUTS II Region	Bachelor, master or PhD degree (%)	High School (%)
Alentejo	78,8%	21,2%
Algarve	83,7%	16,3%
Andalucía	72,7%	22,7%
Área Metropolitana de Lisboa	79,3%	20,7%
Campania	71,4%	28,6%
Jadranska Hrvatska	79,7%	20,3%
Kypros	57,1%	42,9%
Languedoc Roussillon	81,8%	18,2%
Malta	63,6%	30,3%
Provence Alpes Cote d'Azur	83,3%	12,5%
Region de Murcia	66,7%	26,7%
Toscana	44,4%	55,6%
Veneto	75,0%	25,0%
Vzhodna Slovenija	66,7%	33,3%
Zahodna Slovenija	66,0%	34,0%

Regarding years of experience in the tourism industry (see Table 6), the results show that, on average, the number is higher in Kypros (22 years), while the region with the maximum years of experience per stakeholder is Murcia. However, some regions such as the Algarve, Área Metropolitana de Lisboa, Jadranska Hrvatska and Zadodna Slovenija include some stakeholders with no experience in tourism.



Table 6: Descriptive statistics of years of experience in tourism industry

NUTS II Region	Mean	Maximum	Minimum	Standard Deviation
Alentejo	14,0	45,0	1,0	10,9
Algarve	15,3	39,0	,0	9,6
Andalucía	16,4	42,0	3,0	10,6
Área Metropolitana de Lisboa	14,4	34,0	0,0	9,2
Campania	15,9	35,0	1,0	9,6
Jadranska Hrvatska	13,8	42,0	,0	10,3
Kypros	22,4	40,0	5,0	12,0
Languedoc Roussillon	17,1	35,0	1,0	11,5
Malta	13,9	41,0	2,0	11,4
Provence Alpes Cote d'Azur	12,0	40,0	1,0	11,4
Region de Murcia	16,8	50,0	1,0	11,4
Toscana	10,1	25,0	1,0	9,9
Veneto	13,2	30,0	3,0	7,0
Vzhodna Slovenija	16,2	41,0	4,0	13,0
Zahodna Slovenija	14,3	45,0	0,0	10,7

Table 7 shows the type of stakeholders surveyed. The public sector includes national, regional or local government bodies. The private sector includes tour operators, transport operators, hospitality sector businesses, retail travel agencies and tourism attractions. Civil society organisations include, among others, non-governmental organisations, trusts and environmental charities and groups or institutions focusing on the environment, wildlife, human rights and workers' rights. The majority of the stakeholders surveyed are in the private sector. Toscana's stakeholders all belong to the private sector, while, in some regions (i.e. Andalucia, Kypros, Provence Alpes Cote d'Azur and Region de Murcia), none of the stakeholders surveyed are from civil society organisations.



Table 7: Type of stakeholders

NUTS II Region	Civil Society organizations (%)	Private sector (%)	Public sector (%)
Alentejo	6,1%	63,6%	30,3%
Algarve	12,2%	49,0%	38,8%
Andalucía	0,0%	77,3%	22,7%
Área Metropolitana de Lisboa	6,9%	48,3%	44,8%
Campania	14,3%	71,4%	14,3%
Jadranska Hrvatska	7,5%	55,6%	36,8%
Kypros	0,0%	85,7%	14,3%
Languedoc Roussillon	9,1%	63,6%	27,3%
Malta	9,1%	66,7%	24,2%
Provence Alpes Cote d'Azur	0,0%	87,5%	12,5%
Region de Murcia	0,0%	73,3%	26,7%
Toscana	0,0%	100,0%	0,0%
Veneto	5,0%	75,0%	20,0%
Vzhodna Slovenija	26,7%	73,3%	0,0%
Zahodna Slovenija	18,9%	67,9%	13,2%

Table 8 presents the role of the stakeholders surveyed in their organisations. In eight regions (i.e Campania, Languedoc Roussillon, Provence Alpes Cote d'Azur, Region de Murcia, Toscana, Veneto, Vzhodna Slovenija and Zahodna Slovenija), the stakeholders participating in the survey are all presidents, chief executive officers, directors or business owners.

Table 9 shows the level of operation of the stakeholders' organisations. Most stakeholders' institutions operate at an international or national level. In regions such as Kypros, Toscana, Veneto and Zahodna Slovenija, more than 40% of the stakeholders who participated in the survey operate at an international or national level.



Table 8: Stakeholders' role in their organisations

NUTS II Region	President/CEO/director/ business owner (%)	Senior Management staff (%)	Middle management staff (%)	Other (%)
Alentejo	36,4%	18,2%	24,2%	21,2%
Algarve	36,7%	20,4%	18,4%	24,5%
Andalucía	40,9%	9,1%	27,3%	22,7%
Área Metropolitana de Lisboa	13,8%	24,1%	24,1%	37,9%
Campania	61,9%	9,5%	19,0%	9,5%
Jadranska Hrvatska	49,6%	18,8%	14,3%	17,3%
Kypros	42,9%	28,6%	14,3%	14,3%
Languedoc Roussillon	72,7%	0,0%	9,1%	18,2%
Malta	39,4%	33,3%	21,2%	6,1%
Provence Alpes Cote d'Azur	75,0%	4,2%	8,3%	12,5%
Region de Murcia	60,0%	0,0%	6,7%	33,3%
Toscana	88,9%	0,0%	11,1%	0,0%
Veneto	60,0%	0,0%	20,0%	20,0%
Vzhodna Slovenija	53,3%	13,3%	6,7%	26,7%
Zahodna Slovenija	52,8%	15,1%	17,0%	15,1%

Table 9: Level of operation of stakeholders' organisations

NUTS II Region	International (%)	National (%)	Regional (%)	Local (%)
Alentejo	24,2%	24,2%	21,2%	30,3%
Algarve	26,5%	8,2%	24,5%	40,8%
Andalucía	31,8%	36,4%	4,5%	27,3%
Área Metropolitana de Lisboa	37,9%	27,6%	3,4%	31,0%
Campania	23,8%	19,0%	9,5%	47,6%
Jadranska Hrvatska	24,8%	9,8%	8,3%	57,1%
Kypros	42,9%	14,3%	28,6%	14,3%
Languedoc Roussillon	18,2%	18,2%	9,1%	54,5%
Malta	15,2%	33,3%	9,1%	42,4%
Provence Alpes Cote d'Azur	33,3%	4,2%	29,2%	33,3%
Region de Murcia	13,3%	40,0%	26,7%	20,0%
Toscana	55,6%	0,0%	0,0%	44,4%
Veneto	45,0%	30,0%	15,0%	10,0%
Vzhodna Slovenija	26,7%	6,7%	33,3%	33,3%
Zahodna Slovenija	45,3%	7,5%	15,1%	32,1%



2. Scenarios maps

2.1. Global trends analysis

Strategic planning that ensures the development of sustainable and responsible coastal and maritime tourism in the MED area requires an understanding of possible future scenarios that influence present decision-making processes. Change and uncertainty are permanent challenges that tourism-related stakeholders have faced in the past and that they will continue to deal with in the coming years. Formulating a strategy for sustainable tourism under these conditions regularly puts planners to the test in both the public and private sectors.

To ensure success, decision makers need to look behind the daily headlines and ask the right questions about what will affect both their organisations and regions in the future. This requires considering the deeper, underlying global trends that will continue to shape and drive the tourism sector. This report identifies a selected number of global trends that affect both tourists' behaviours and public and private organisations of the MED area in the present and will do so into the future.

A holistic view of global trends enables private sector stakeholders to look outside their immediate categories and markets and observe the direct or indirect impacts of change on their future. A longer-term perspective allows stakeholders to ensure continuously successful innovation and to shift from reactive to proactive strategies, as well as providing opportunities to develop more sustainable and responsible tourism in the MED area.

In addition, analyses of global trends help public stakeholders transform the way they work, overcome outdated structures and modes of thinking and embrace new technologies and ideas that promote sustainable tourism development. Innovation in the public sector is about finding new ways to have a positive impact on the lives of citizens and practices of companies and new approaches to activate these individuals and firms as partners, thereby ensuring a sustainable tourism industry in the MED area.

Evidence has been found that global trends strongly affect different regional assets and the ways these assets impact tourism in the Mediterranean region on both the demand (i.e. push factors) and supply side (i.e. pull factors). Although a variety of trends could increasingly affect tourism stakeholders over the next few years, this report focuses only on the most important ones. This shortened list includes:

1. Socio-demographic trends
2. Economic trends
3. Political trends
4. Environmental trends
5. Technological trends

These trends can generate either positive or negative impacts depending on their specific nature. In addition, both positive and negative trends produce different impacts and/or challenges for tourism stakeholders, which



can be divided into direct and indirect or potential and postponed trends. These impacts affect not only tourists and tourist enterprises but also host governments and local destinations' systems.

Direct positive impacts are most commonly identified and measured through the growth of tourism demand and consumption and the long-term expansion of tourism enterprises' business. Global trends may indirectly or potentially affect those industries and sectors that are related to tourism. Thus, any positive changes in these industries correlate positively with trends in the tourism industry's results, with most positive impacts – both direct and indirect – having the potential to be expressed in financial terms.

Negative global trends (i.e. different kinds of crises) can similarly affect all tourism-related stakeholders in direct and indirect ways. Direct impacts are commonly measured in terms of human victims (i.e. injured and/or dead) in destinations, and the material assets destroyed or damaged. These impacts may also be measured through increasing adaptation costs. Indirect, potential and/or postponed negative impacts are usually measurable in the long term and are related to the lost opportunities and collateral costs caused by, among others, a weakened market position and image deterioration. Indirect impacts can also be expressed in financial terms. The exception to this is loss of human life, whose value is intangible, although some aspects of this loss can be expressed in financial terms, such as costs connected with the loss of skilled labour. Tables 1 to 5 present insights into each of the key global trends that impact multiple tourism-related stakeholders and that will continue to affect decision-making processes.



Table 10: Socio-demographic trends
Drivers Trends

Education	• More knowledgeable consumers who seek out diversified, well interpreted and protected cultural resources, monuments and sites • Well educated consumers who look for high quality accommodations • Well educated consumers who seek out clean, preserved and sound environments • Improved quality of employees in tourism accommodation facilities • Growth of investments in the research and development of smart, green and sustainable transport techniques • Expansion of opportunities for skilled labour in the tourism industry • Supply side of higher education levels helping to ensure better care for the environment • Better levels of education contributing to the implementation of good governance practices • Expansion of the global middle class • Increased empowerment of populations • Growth of empathy, trust and social responsibility
Changes in values and lifestyles	• Increased demand for special types of tourism based on culture and other types of attractions • More demand for special types of tourism resulting in a continuous growth of different types of accommodations • Growth of investments in quality of accommodations • Rising awareness of the need to act responsibly and sustainably towards energy use • Expansion of entrepreneurship in tourism and related activities • Growing numbers of jobs in tourism and related activities • More of the population employed in new (e.g. smart and creative) industries • Increasing numbers of tourists travelling worldwide and using different types of resources to satisfy their travel need and motivations • Greater awareness of the value of clean, preserved natural resources • More investment in nature preservation • Increase in new management architecture at all levels • Growing role of destination management organisations on a global level • Increased concerns about health, nutrition and wellbeing • Search for wellness products, fitness, spiritual retreats and boot camps • Demand for destinations considered more beneficial to visitors' health
Changes in work patterns	• Diversification of accommodation facilities and their adaptation to meet the needs of new classes of travellers on vacation and business trips • Diversification of transport facilities and their adaptation to meet the needs of new classes of travellers in terms of comfort and speed while on vacation and business trips • More intense and diversified entrepreneurial activity, including marginalised groups • Increased number of tourists travelling for shorter periods and with more diversified motivations • Greater costs related to new legal and other frameworks necessary to accommodate new work patterns • Larger number of tourists travelling for business purposes • New forms of social networks
Population profiles	• More elderly people travelling and looking for special offers, special accommodations and more comfortable transport modes adjusted to accommodate their age • Reduction in the potential labour force for the tourism industry • Increased labour importation leading eventually to changes in destinations' image • Growing costs of adjusting facilities and services related to the needs of the elderly • More elderly people travelling and seeking out special offers regarding environmental assets that can accommodate their age • Adaptation of management and administrative capacities at all levels of government and/or governance • Search for health services (i.e. medical and aesthetic), particularly in countries with more affordable prices and infrastructure and natural conditions favourable to travellers' wellbeing



Table 11: Economic trends

Drivers	Trends
Deregulation and/or liberalisation of international trade	• Increased accessibility of sites to new groups of tourists • Easier access for investors willing to invest into the tourism and/or accommodation industries • Growth of low-cost carriers due to the open skies policy • Easier exchange of ideas, goods, services and labour in the tourism and other industries leading to more competitiveness • Enhanced investments and entrepreneurial climate • Additional pressures on natural and anthropogenic resources • Institutional and/or administrative costs related to new standards and procedures • Increase in agglomeration economies (i.e. clusters and networks) enhancing tourism competitiveness
Population migrations	• Disruption of tourist flows to cultural sites due to security problems • Less money available for care and protection of cultural sites • Growing opportunity costs due to the need to develop adaptation policy measures • Financial losses for the entire tourism sector and related activities • More opportunity costs in the accommodation and transport industries due to the need to generate adaptation policy measures • Less money for individual care and protection • Increasing institutional and transaction costs related to mitigation policies and measures • Potential growth of xenophobia and social, cultural, ethnic and related conflicts
Globalisation	• More competitive global business environment and more price conscious tourists • Emergence of new destinations and markets • Increasing travel expectations of younger populations requiring the provision of accurate information and services through new information and communications technology (ICT) • Decreased numbers of repeat visitors to the same destinations and increased search for new experiences and products • Growing numbers of people travelling to visit family and relatives



Table 12: Political trends
Drivers Trends

Shift of economic barycentre to the south and east in international trade	• Increasing demand for special types of tourism based on culture and other types of attractions • More adaptation costs in the accommodation industry due to the needs of new types of tourists • Growth in new investments in transport facilities and infrastructure due to the arrival of tourists from distant parts of the world • Expansion of entrepreneurship in tourism and related activities • Increased adaptation costs for the entire tourism industry to meet the needs of new tourists • Growing numbers of tourists travelling worldwide and using different types of resources to satisfy their travel needs and motivations • More tourists coming by plane from distant continents • Expansion of agglomeration economies (i.e. clusters and networks) enhancing tourism competitiveness • Need for diversified regulations, strategic plans and integrated management • Growth of awareness of the value of clean, preserved natural resources
Urbanisation	• Growth in demand (i.e. number of tourists) for cultural and creative attractions in large cities • Continuous competition for markets between big cities offering cultural urban tourism • Large cities become generators of tourism flows • Expansion of different types of accommodation capacities in urban centres • Higher quality accommodation facilities • Growing investments in new intra-city and inter-cities high-quality transport systems and facilities • Larger numbers of urban residents travelling through natural environments • Increase in urban tourism producing more negative environmental impacts (i.e. carbon dioxide, sulphur dioxide and water, air and sea pollution) • Loss of aesthetic value of landscapes • Growth in number of tourism associations and networks in urban tourism due to strengthening of cooperation and partnership • Need for diversified regulations and strategic plans • Necessity for integrated management

Table 13: Environmental trends
Drivers Trends

Climate change	• Coastal erosion • More endangered monuments and sites and consequent growth in protection costs • Increased maintenance and operating costs for natural tourist attractions such as beaches, snow resorts and rivers • Decreased attractiveness of natural resources affected by climate change
Growing levels of environmental awareness	• Fewer tourists travelling to endangered sites • Introduction of new practices and technologies resulting in reduced water consumption and energy efficiency • Various changes in transport modes (e.g. increased use of railways), including, among others, development of intermodal transport and increased use of public transport • New business practices and changes in profitability due to mitigation and adaptation measures • Increased demand for activities associated with nature tourism and consequent emergence of more sophisticated products in these segments • Search for more natural and/or organic products • Change and adaptation of management and marketing strategies to address environmental issues



Table 14: Technological trends

Drivers Trends

ICT development and use	• Better interpretation and valorisation of monuments and sites • Better equipped, more efficient and more competitive accommodation and transport facilities • More labour with information technology skills and competencies • Growing business sector efficiency • Better interpretation and valorisation of natural resources • Enhanced government efficiency and effectiveness • Improved flow of information • Expanded use of travel technologies through digital platforms for information consultation and purchase of tourism and cultural products online • Increasing disintegration of sales through online distribution channels • Greater interest in creative and interactive offerings in which consumers are simultaneously the producer, actor and viewer
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Together these global trends set the context in which the global – and Mediterranean – tourism industry can expect to operate in the future. In a rapidly changing world environment, global trend analysis is critical for organisations seeking to drive sustainable tourism development and remain relevant as competition increases and new ideas disrupt entire businesses, sectors, industries and regions.

Each major trend has varying impacts on different regions and countries, depending on many factors from socio-demographic, geo-political and economic aspects to regions' physical features. These trends' uncertainty and uncontrollability also make it extremely difficult to measure accurately their direct effects on sustainable tourism development. In addition, measuring sustainable development – especially the development and application of indicators able to measure the sustainability of specific activities – requires a multidisciplinary approach. Thus, any attempt to measure the impacts of global trends on sustainable tourism development will almost certainly fail to achieve the targeted results no matter how ambitious the measure used from a conceptual, methodological and empirical point of view. This implies that the more prudent choice is to avoid searching for misleading results and instead to analyse effects that global trends have had on past performance measures of MED regions and extend these impacts into the future.

Regarding performance measures, dozens of theoretical measures can be applied – all with good justifications for their use and with proven value for decision-making processes. However, various difficulties have arisen when researchers have tried to apply these measures, particularly when precise, coherent, comparable and accessible information is needed for all MED regions. For this reason, the ShapeTourism project decided to use only tourism performance measures published by Eurostat. The available absolute measures were harmonised for all MED regions, since these vary greatly in terms of size, through indicators of tourism carrying capacity.

Subsequently, projections of the effects of global trends into the future were created using scenario-based analysis because this facilitates the exploration of the joint impacts of various uncertainties. While the future is inherently uncertain, scenarios assist in restricting these uncertainties to a limited number of likely paths. Some paths may lead to undesirable consequences while others point to surprisingly favourable outcomes. Once these alternatives were articulated, the inherent uncertainties could be more easily explored to find opportunities and challenges for sustainable tourism development that might otherwise be missed. The



development of scenarios also has the benefit of continually pushing the envelope of possibilities since this approach regards strategic planning as a collective learning process.

2.2. Scenarios maps

Scenario analysis– a technique widely used in futures studies – has long been used by public planners, corporate managers and military analysts as a powerful tool to aid decision-making processes in order to deal with uncertainty. The idea behind this technique is to organise thinking about possible futures, which can minimise surprises and broaden the scope of decision makers' ideas about different possibilities. In the ShapeTourism project, scenario analysis has been used to produce information about the effects of growth in tourism demand and supply on regions' tourism carrying capacity indicators.

Sustainable tourism development involves the preservation and enhancement of regions' natural environments and cultural heritage. The long-term success of tourism development is closely linked to its sustainability, with destinations' attractiveness often influenced by several regional characteristics ranging from natural and cultural environments to historic identity. These characteristics of each region are constantly being shaped by global trends. For example, strong or uncontrolled tourism demand due to the above-mentioned trends poses various threats to both natural and cultural resources. Increasing numbers of tourists in urban areas may result in overcrowding, higher pollution levels, overuse of natural and recreational resources and potential overdevelopment, while, in rural and coastal areas, more tourists may lead to soil erosion, increased waste, discharges into the sea, the loss of natural habitats, pressure on land use and a loss of the aesthetic value of landscapes. Thus, the ShapeTourism team decided to follow a well-known successful method – used, for example, by Eurostat – to measure tourism pressures linked with sustainability issues.

This method applies the concepts of tourism intensity and tourism density. Tourism intensity is the relationship between absolute measures of tourism and the total resident population of each region. Tourism density, in turn, is the relationship between absolute measures of tourism and the area (i.e. per square kilometre [km²]) in each region available to accommodate tourists.

As mentioned previously, the project team decided to use as the absolute measures of tourism only statistics published by Eurostat for the regional level (i.e. NUTS 2 and/or NUTS 3 levels). Thus, the following measures were used in the tourism intensity and density indicators:

- **Number of guests** – total number of resident and non-resident guests spending at least one night in tourist accommodation establishments at the NUTS 2 level
- **Number of nights spent** – total number of nights spent by guests in tourist accommodation establishments at the NUTS 2 level
- **Number of bed places** – total number of individuals who can stay overnight in beds offered by establishments, excluding any extra beds that may be set up upon customers' request, at the NUTS 3 level



Tourist accommodation establishments include hotels, holiday and other short-stay accommodation, camping grounds, recreational vehicle parks and caravan parks.

The scenario analysis was organised into three groups of tourism carrying capacity indicators: physical-ecological, sociocultural and economic. Each group was then divided into indicators representing both the demand and supply side of tourism. The indicators used are discussed in more detail below.

PHYSICAL-ECOLOGICAL INDICATORS

TOURISM DENSITY – GUESTS

This is the ratio of the total number of arrivals at tourist accommodation establishments (i.e. number of guests), per year, to the region's total area in km².

$$Td_{guests} = \frac{\text{Number of guests}}{\text{Area (Km}^2\text{)}}$$

TOURISM DENSITY – NIGHTS SPENT

This is the ratio of the total number of nights spent at tourist accommodation establishments, per year, to the region's total area in km².

$$Td_{nights} = \frac{\text{Number of nights spent}}{\text{Area(Km}^2\text{)}}$$

ACCOMMODATION DENSITY – BED PLACES

This is the ratio of the total number of bed places to the region's total area in km².

$$Ad_{beds} = \frac{\text{Number of bed places}}{\text{Area(Km}^2\text{)}}$$

SOCIOCULTURAL INDICATORS

TOURISM INTENSITY – GUESTS

This is the ratio of the total number of arrivals at tourist accommodation establishments (i.e. number of guests), per year, to the total permanent resident population of the region.

$$TI_{guests} = \frac{\text{Number of guests}}{\text{Number of residents}}$$



TOURISM INTENSITY – NIGHTS SPENT

This is the ratio of the total number of nights spent at tourist accommodation establishments, per year, to the total permanent resident population of the region.

$$TI_{nights} = \frac{\text{Number of nights spent}}{\text{Number of residents}}$$

ACCOMMODATION INTENSITY – BED PLACES

This is the ratio of the total number of bed places to the total permanent resident population of the region.

$$AI_{beds} = \frac{\text{Number of bed places}}{\text{Number of residents}}$$

ECONOMIC INDICATORS

OCCUPANCY RATE

This is the ratio of the average number of nights spent at tourist accommodation establishments, per day, to the number of bed places.

$$Oc_{rate} = \frac{\text{Number of nights spent per day}}{\text{Number of bed places}}$$

AVERAGE LENGTH OF STAY

This is the ratio of the total number of nights spent at tourist accommodation establishments, per year, to the number of arrivals at tourist accommodation establishments.

$$Av_{los} = \frac{\text{Number of nights spent}}{\text{Number of guests}}$$

The analyses produced future scenarios for these tourism performance measures for 2020, 2025 and 2030, reflecting different assumptions about the annual growth rate of the measures. The results were developed and implemented as maps in order to find more creative and properly adjusted options for sustainable tourism development.

The following four scenarios were developed for the tourism density and intensity indicators for guests:

- If the number of guests increases by 1% per year
- If the number of guests increases by 2% per year



- If the number of guests increases by 5% per year
- If the past patterns of the number of guests continue into the future

The four scenarios developed for the tourism density and intensity indicators for nights spent are the following:

- If the number of nights spent increases by 1% per year
- If the number of nights spent increases by 2% per year
- If the number of nights spent increases by 5% per year
- If the past patterns of the number of nights spent continue into the future

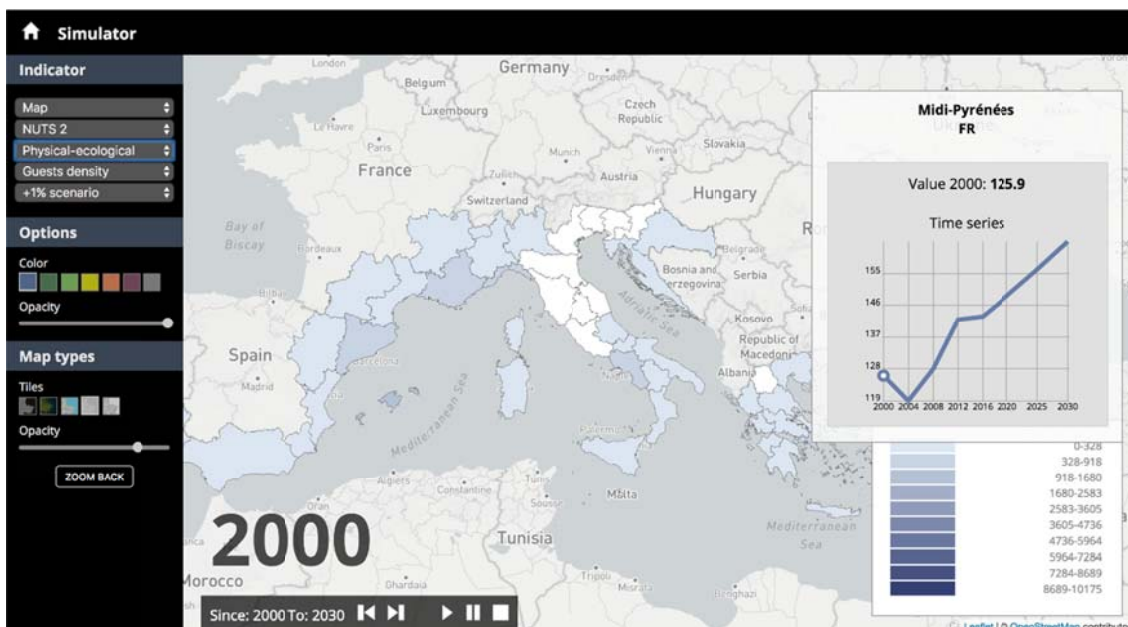
Finally, only the following three scenarios were developed for the accommodation density and intensity indicators for bed places:

- If the number of bed places increases by 1% per year
- If the number of bed places increases by 2% per year
- If the past patterns of the number of bed places continue into the future

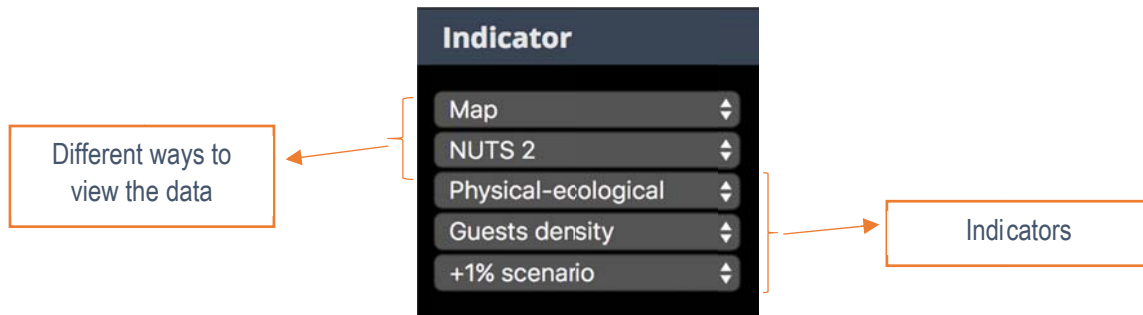
The results of these scenarios can be visualised using the Scenarios Map tool.

2.3. Scenarios maps tool highlights

On the homepage, you can access the indicators described previously.



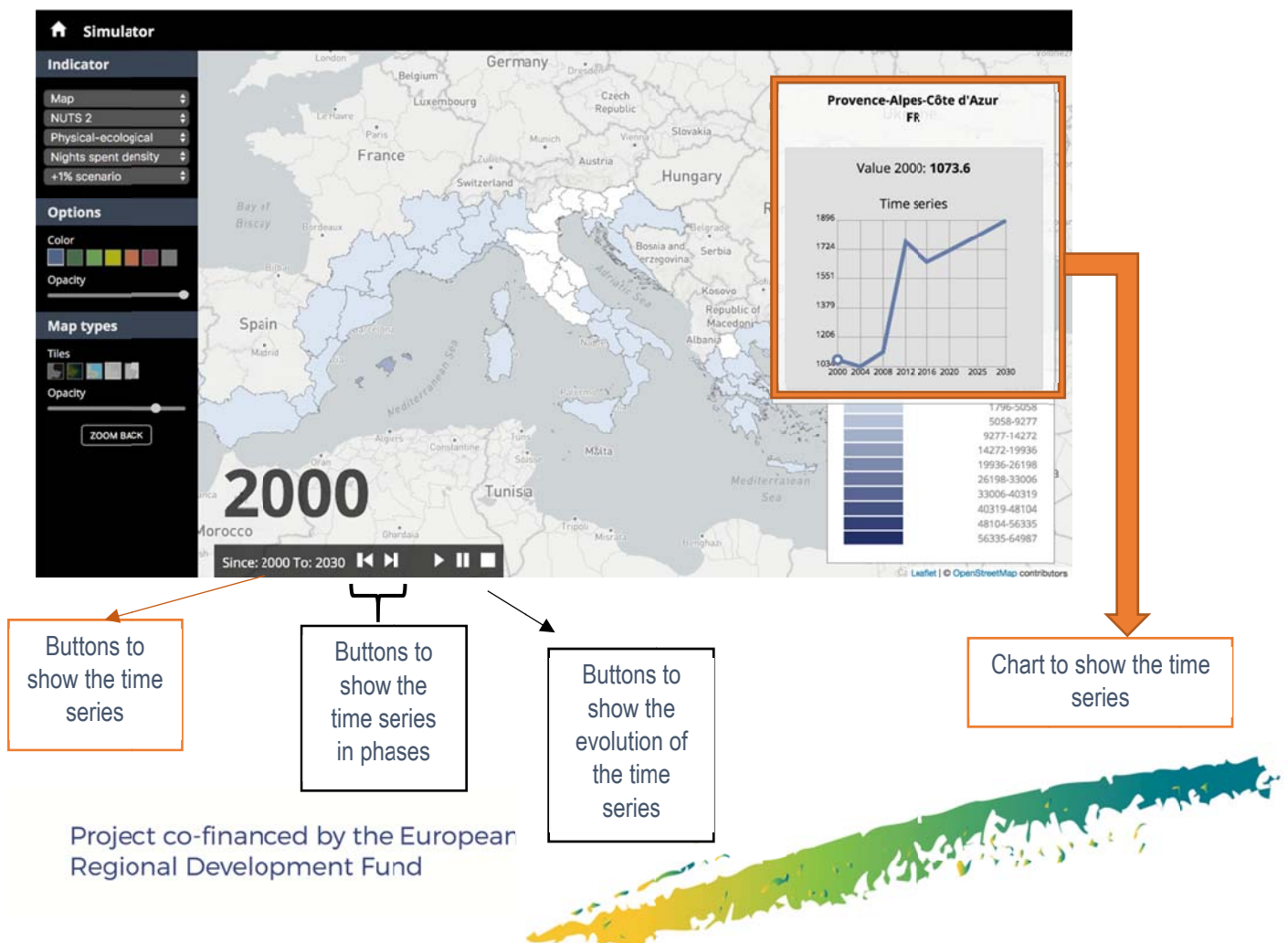
These indicators were generated to facilitate a clearer understanding of the feasibility of implementing sustainable tourism in the MED regions surveyed.



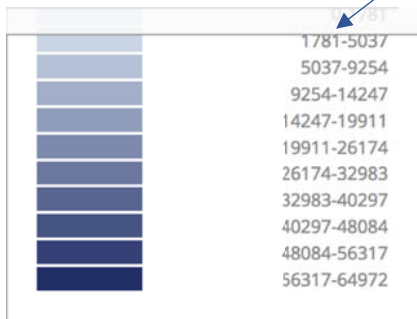
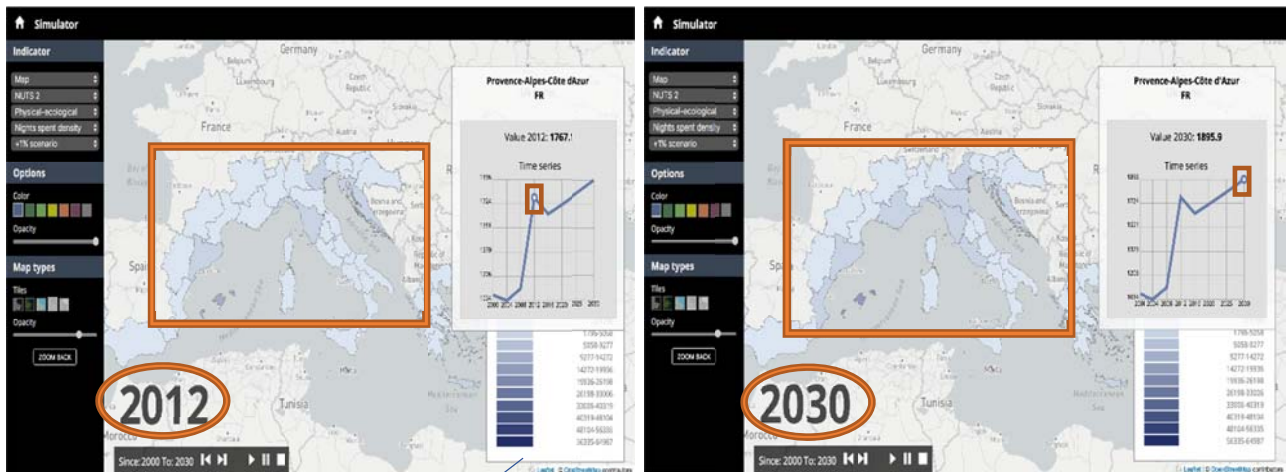
On the left side of the home page, you can choose how to view the data and what you want to see. You can select variants of all available variables and view them at the same time. The data displayed refer to NUTS 2 or NUTS 3 regions, which can only be viewed in a map format. You can place the mouse button over the desired region to gain access to the information about the selected question.

The data are organised in a time series from 2000 to 2030, and their evolution can be observed on the map by using the buttons below. The time series is divided into 4-year periods up to 2020 and thereafter into 5-year periods.

The buttons have been assigned default functions, but the data visualisation can be changed according to the preferences of those who visit the platform.



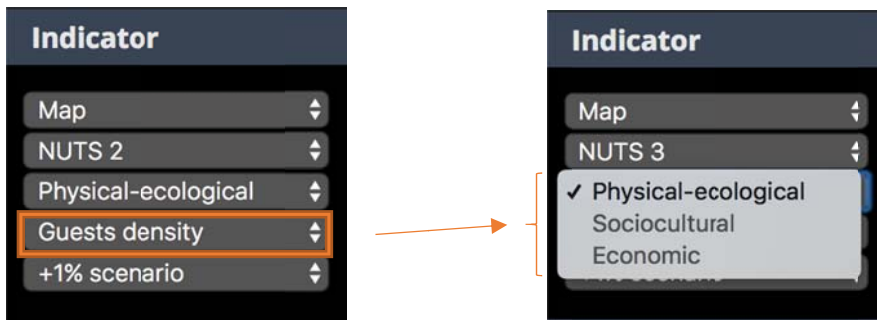
While the data can be examined using the map, a chart also tracks the data's evolution at the same time as the map does to make the data more immediately understandable. As the data evolves in the map, the requested NUTS 2 or NUTS 3 zones change colours to reflect the indicator's values according to the colour scale used.



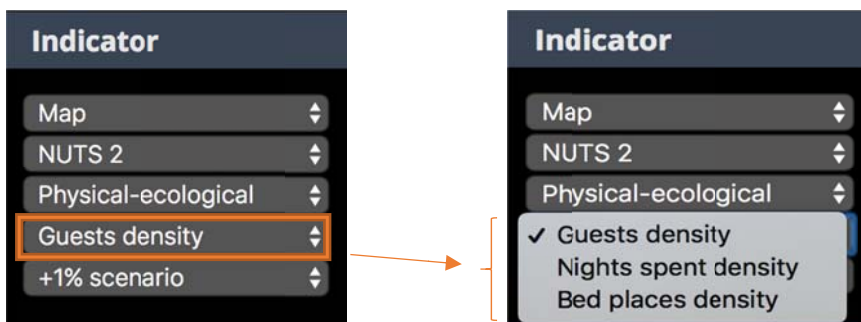
The scale used presents darker colours for higher values and lighter colours for lower values of the indicators in question. The complete scale cannot be visualised separately from the map.

To help users to choose the variables they most want to see, three types of indicators have been developed: physical-ecological, sociocultural and economic. Although data on these three indicators are already available, the sociocultural and economic indicators are not yet available for selection. However, the way the system functions for the physical-ecological indicators will be the same for the remaining indicators.





The platform thus provides physical-ecological indicators, focusing on the ratio of the total number for the variable under analysis – per year – to the total area (i.e. square kilometres [km²]) of each region.

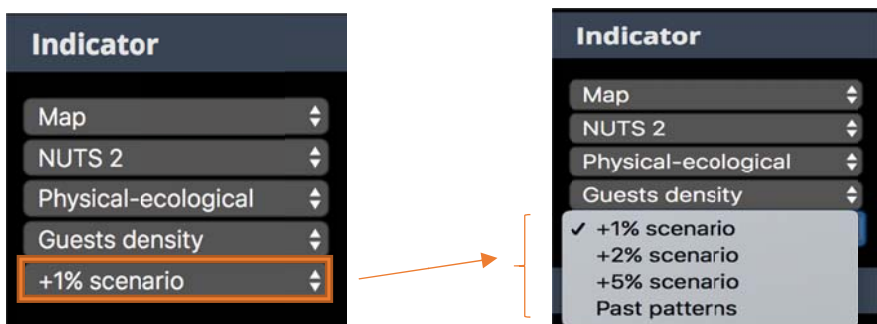


The GUEST DENSITY INDICATOR is the ratio of the total number of arrivals at tourist accommodation establishments (i.e. number of guests), per year, to the total area (km²) of each region.

The NIGHTS SPENT DENSITY INDICATOR is the ratio of the total number of nights spent at tourist accommodation establishments, per year, to the total area (km²) of each region.

The BED PLACES DENSITY INDICATOR is the ratio of the total number of bed places to the total area (km²) of each region.

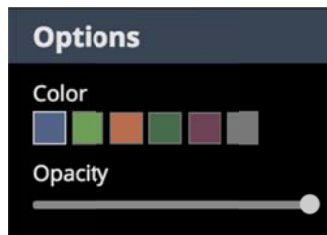
The platform also provides various future scenarios that assume different annual growth rates, namely, 1%, 2% and 5%. Past patterns are also considered to be scenarios.



You can always zoom to the initial situation of a region by using the relevant buttons.



On the map, the data are represented by colours that can be modified to others chosen from among the colour options – along with their opacity.



If you choose to view the data as a map, you can control the way the map appears on the homepage from among the five available options, as well as the map's opacity.



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Appendix: Questionnaire in eight languages

Tourism Stakeholders' Questionnaire

Information for participants

This survey aims to identify regional dynamics and trends affecting the MED area as well as to evaluate the impact that global changes may have on a sustainable tourism development.

Participation is entirely voluntary and you will in no way be disadvantaged should you choose not to take part. However, you have a unique opportunity to give your opinion in a transnational survey that aims to produce information fostering the tourism sustainability. This survey will produce results that might be used by all tourism stakeholders to support decision-making in order to change policies, business practices and consumer behaviour towards a more sustainable tourism sector.

The survey will run until 31st of July 2017. You may complete the survey at any point during this time. If your organisation is located in more than one NUTS III, you will receive more than one questionnaire and we ask you to fill in one per region NUTS III. The survey will take approximately 15 minutes to complete.

All answers are confidential. By taking part in the survey you are giving consent to be part of this research. The results of this research will be available on the project website (www.shapetourism.eu) and in the Interreg MED platform. Results of this research may also appear in journal and conference publications.

Thank you!

Section 1: Personal and organizational characteristics

1. Region where the organization is located (if your organisation is located in more than one NUTS III, you will be asked to fill in one per region NUTS III)
_____ [including a drop down list: NUTSIII]

2. Age: _____

3. Gender:

☐ Male

☐ Female

4. Educational attainment:

☐ Elementary school

☐ High school

☐ Bachelor, master or PhD degree

[If option bachelor, master or PhD is selected] Area: _____



5. Number of years of experience related to the tourism industry (employment or other): _____

6. Type of key stakeholder that you represent:

- ☐ Public sector (national, regional or local government bodies)
☐ Private sector (tour operators, transport operators, hospitality sector, retail travel, visitor attractions)
☐ Civil society organizations (e.g. non-governmental organizations, trusts and environmental charities, environment, wildlife, human rights, and worker rights)

7. Your role in the organisation:

- ☐ President/CEO/director/business owner
☐ Senior management staff
☐ Middle management staff
☐ Other

8. What is the level of the operation of your entity?

- ☐ Local
☐ Regional
☐ National
☐ International

Section 2: Tourism dynamics and trends

1. Please identify three main competitors of your region from the following list:

- Competitor 1 (including a drop down list: Country – NUTSIII)
- Competitor 2 (including a drop down list: Country – NUTSIII)
- Competitor 3 (including a drop down list: Country – NUTSIII)

2. Having in mind your region as a tourism destination and reflecting on period from 2014 to 2016, express your agreement with the following statements:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I do not know/I cannot assess
My region is investing more in tourism this year						
Tourism is creating more jobs and recruiting more workers in my region this year						
Tourism demand for my region is increasing this year						
Tourism offer of my region is growing this year						
My region is diversifying the tourism offer this year						
My region is cutting down prices to encourage sales this year						



My region is increasing marketing efforts this year to attract more tourists						
My region is promoting this year in new markets /segments						
My region is diversifying its distribution channels this year						

Section 3: Local reactions on global trends for tourism sustainability

Please indicate how much you agree with each of the following statements:

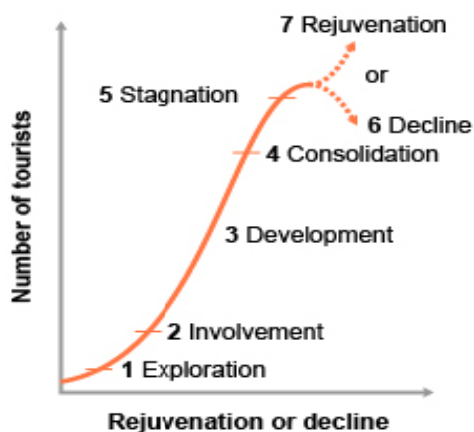
My region is ...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I do not know/I cannot assess
... is working to face the entry of new competing destinations						
... is working to deal with a possible terrorist threat						
... is working to ensure environmental sustainability (e.g. reducing energy and water consumption)						
... is working to ensure social sustainability (e.g. cultural authenticity, inclusive society)						
... is taking advantage of the knowledge enabled by big data						
... is using the digital marketing channels						
... is prepared to meet the growing concern for health and well-being						
... is prepared to face climate change						
... is working to ensure economic sustainability						
... is working to take advantage of the collaborative economy						

Section 4: Destination life cycle

Considering the figure below, please indicate in which phase (1 to 7) you perceive your NUTS III region is in terms of tourism development: _____





Note:

1. **Exploration:** Small number of tourists visits, place unspoilt and few facilities exist.
2. **Involvement:** Some facilities for tourists, tourist season recognition.
3. **Development:** Some advertisement to the area. The area becomes recognised as a tourist destination.
4. **Consolidation:** The growth in tourist numbers is weaker. Some conflicts between the host and the tourists.
5. **Stagnation:** The facilities for the tourists could decline and become old. The numbers of tourists may decline.
6. **Decline:** If the destination is not rejuvenated (stage 6) then it will go into decline. People lose their jobs related to tourism. The image of the area suffers.
7. **Rejuvenation:** Investment and modernisation on the destination to increase the number of tourist attraction.

Source: Butler (1980)

Section 5: Tourism externalities

1. Please indicate how much you agree with each of the following statements concerning the **positive impacts** of tourism in your region.

Tourism ...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I do not know/I cannot assess
... creates jobs for local residents						
...increases income levels and standard of living						
... creates new markets for our local products						
... benefits other economic activities in my region						
... helps to develop better infrastructures and public transports						
... helps to preserve the natural environment and natural heritage of our region						
... helps to preserve the cultural heritage of our region						
... increases the number of cultural and recreational events for local residents						



... improves residents' quality of life						
... helps to preserve socio-cultural authenticity and historic identity of our region						
... encourages cultural exchange						

2. Please indicate how much you agree with each of the following statements concerning the **negative impacts** of tourism in your region.

Tourism...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I do not know/I cannot assess
... increases prices of goods and services for residents						
... raises real estate values (price of land and housing)						
... causes crowding out of other economic activities						
... produces long-term negative effects on the environment						
... increases water pollution						
... increases other types of pollution (air, noise, soil)						
... causes overdevelopment (concerning over construction)						
... causes overcrowding						
... causes overuse of natural and recreational resources						
... increases crime						
... puts strong pressure on land use and loss of aesthetic landscape values						

Section 6: Sustainability of tourism development

Private sector (if respondent represents a stakeholder from the private sector)

Sustainability practices incorporated

1. To what extent have you incorporated each of the following sustainable practices into your business operations?

	To a great extent	To some extent	Not at all
Recruit and hire local people for job opportunities			
Purchase products from local suppliers			
Creation of business linkages within tourism and other economic activities of your region			
Purchase from companies with certificates of green practices			
Reduce and manage greenhouse gas emissions			



Manage, reduce and recycle solid waste (e.g. composting of waste)			
Reduce consumption of freshwater (e.g. use of a low use water management system)			
Manage wastewater			
Reduce noise			
Be energy efficient (e.g. use of low energy lighting)			
Use renewable energy sources (e.g. solar, wind, etc.)			
Use green products for business (e.g. biodegradable materials, recycled paper, etc.)			
Limit visitor access to sensitive natural resources			
Limit visitor access to sensitive cultural and historic resources			
Preserve the cultural and historic identity			
Implement environmental education programs for visitors			
Train and educate employees on sustainability practices			
Obtain a "green certification"			
Donate funds or in-kind services to green initiatives			
Establish a "green culture" in the workplace (e.g. encouraging car-pooling, ride your bike to work day)			

Barriers and Challenges

2. To what extent has each of the following barriers impacted your ability to adopt sustainable tourism practices in your operations?

	To a great extent	To some extent	Not at all
Lack of available money to invest (e.g. equipment, renovations, systems, etc.)			
Lack of sustainability incentive programs(e.g. government incentives)			
Lack of time to plan for sustainability due to other business priorities			
Limited access to suppliers who sell sustainable products (e.g. organic food, alternative fuels, biodegradable items, etc.)			
Lack on information on how to be more sustainable			
Lack of commitment to the need for sustainable tourism practices			
Lack of appropriate legislation			
Low importance attached by clients to sustainability			
Other: _____			

Public sector or civil society organization (if respondent represents a stakeholder from the public sector or from a civil society organization)

Tourism development respects sustainability

1. Please indicate how much you agree with each of the following statements about tourism development in your region:



	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I do not know/ I cannot assess
In general, the impacts of tourism developments and proposals are considered a problem						
Sustainability issues, including resource constraints, are taken into account in tourism plans						
Individual tourism developments are controlled by effective land use planning processes						
Environmental/Sustainability Impact Assessment is effectively applied to tourism developments						
Economic instruments are used to influence the sustainability of tourism developments						
Advice is available and given to developers on the sustainability of their projects						

Tourism operations meet sustainability standards

2. Please indicate how much you agree with each of the following statements about tourism operations in your region:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	I do not know/ I cannot assess
Regulations are in place and implemented concerning the environmental impact of tourism operations						
In general, tourism service providers are taking steps to improve the sustainability of their operations						
Tour operators are taking account of sustainability issues in the products they promote and information they provide						
Economic instruments are being used to influence the sustainability of tourism operations						
Certification schemes are being used to identify businesses complying with sustainability standards						
Capacity building and advice are being provided and promoted to tourism businesses on enhancing the sustainability of their operations						
Actions have been taken to make tourists aware of sustainability issues in the country and to influence their activities						



3. To what extent has your region incorporated each of the following sustainable practices?

	To a great extent	To some extent	Not at all
Limit visitor access to sensitive natural resources			
Limit visitor access to sensitive cultural and historic resources			
Preserve the cultural and historic identity			
Implement environmental education programs for visitors			
Train and educate employees on sustainability practices			
Donate funds or in-kind services to green initiatives			
Use residents' opinion to support decisions on tourism development			



Questionario Stakeholder del settore turistico

Informazioni per i partecipanti

Questo sondaggio mira a identificare le dinamiche e i trend regionali inerenti all'area MED, nonché a valutare l'impatto che i cambiamenti globali possono avere sullo sviluppo turistico sostenibile.

La partecipazione è interamente volontaria, non ci saranno svantaggi o implicazioni per chi non parteciperà. Tuttavia, questa è un'opportunità unica per esprimere la propria opinione in un'indagine transnazionale che ha lo scopo di produrre informazioni per la promozione della sostenibilità turistica.

I risultati prodotti potranno essere utilizzati da qualsiasi stakeholder turistico come supporto nei processi di *decision-making* volti al cambiamento di politiche, pratiche aziendali e comportamenti dei consumatori nella prospettiva di sviluppare un settore turistico più sostenibile.

Il questionario sarà disponibile fino al 31 Ottobre 2017; sarà possibile completarlo in qualsiasi momento entro tale scadenza. Se la Vostra organizzazione è localizzata in più di una regione NUTS III riceverete più di un questionario: vi chiediamo di completarne uno per ogni regione NUTS III. Il tempo di compilazione è di circa 15 minuti.

Tutte le risposte sono confidenziali. Partecipando a questo sondaggio darete il consenso ad essere parte di questa ricerca. I risultati saranno disponibili sul sito del progetto (www.shapetourism.eu) e sulla piattaforma Interreg MED; potrebbero inoltre apparire in riviste o pubblicazioni inerenti a conferenze.

Grazie!

Sezione 1: Caratteristiche personali e dell'organizzazione

Regione in cui l'organizzazione è localizzata (Se la Vostra organizzazione è localizzata in più di una regione NUTS III si richiede di completare un questionario per ogni regione NUTS III) _____ [include elenco a tendina: NUTSIII]

2. Età: _____

3. Sesso:

☐ Maschile

☐ Femminile

4. Titolo di studio:

☐ Licenza elementare

☐ Diploma di Scuola Superiore

☐ Laurea Triennale, Laurea Magistrale (Master) o Dottorato

[Se è stata selezionata l'opzione Laurea Triennale, Laurea Magistrale (Master) o Dottorato]

Ambito: _____

5. Numero di anni di esperienza nel settore turistico (occupazione o altro): _____



6. Tipo di stakeholder che Lei rappresenta:

- ☐ Settore pubblico (istituzioni a livello nazionale, regionale, locale)
- ☐ Settore privato (tour operator, operatore nel settore dei trasporti, dell'ospitalità, agenzie viaggi, attrazioni turistiche)
- ☐ Organizzazione della società civile (es. organizzazioni non governative, enti di beneficenza, per l'ambiente, per la flora e fauna selvatiche, per i diritti umani, per i diritti dei lavoratori)

7. Il Suo ruolo nell'organizzazione:

- ☐ Presidente/Amministratore Delegato/Dirigente/Proprietario
- ☐ Personale di inquadramento superiore
- ☐ Personale di inquadramento intermedio
- ☐ Altro

8. A che livello opera la sua organizzazione?

- ☐ Locale
- ☐ Regionale
- ☐ Nazionale
- ☐ Internazionale

Sezione 2: Dinamiche e trend turistici

1. Identifichi cortesemente tre principali competitor della sua regione nella lista seguente:

- Competitor 1 (include elenco a tendina: Paese – NUTSIII)
- Competitor 2 (include elenco a tendina: Paese – NUTSIII)
- Competitor 3 (include elenco a tendina: Paese – NUTSIII)

2. Tenendo presente la propria regione come destinazione turistica e facendo riferimento al periodo dal 2014 al 2016 esprima il suo essere d'accordo o meno con le seguenti affermazioni:

	Molto in disaccordo	In disaccordo	Nè d'accordo nè in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
Quest'anno la mia regione sta investendo maggiormente nel turismo						
Quest'anno nella mia regione il turismo sta creando più posti di lavoro e impiegando più personale						
Quest'anno nella mia regione sta crescendo la domanda turistica						
Quest'anno nella mia regione sta crescendo l'offerta turistica						
Quest'anno la mia regione sta diversificando l'offerta turistica						
Quest'anno la mia regione sta abbassando i prezzi per						



incrementare le vendite						
Quest'anno la mia regione sta aumentando le iniziative di marketing per attrarre più turisti						
Quest'anno la mia regione si sta promuovendo in più mercati/verso più segmenti						
Quest'anno la mia regione sta diversificando i canali di distribuzione						

Sezione 3: Reazioni locali verso i trend globali per la sostenibilità turistica

Indichi cortesemente quanto Lei si trova d'accordo con le seguenti affermazioni:

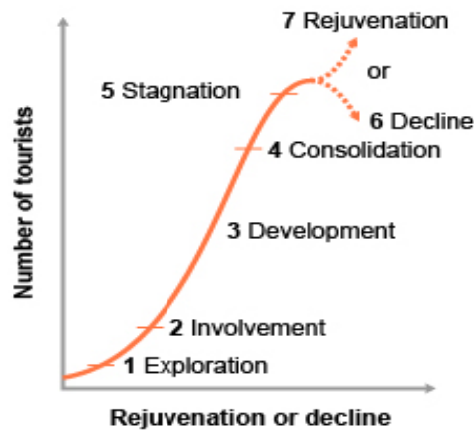
La mia regione...

	Molto in disaccordo	In disaccordo	Né d'accordo né in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
... sta lavorando per affrontare l'entrata di nuove destinazioni competitive nel mercato						
... sta lavorando per far fronte a un possibile attacco terroristico						
... sta lavorando per assicurare la sostenibilità ambientale (es. riducendo il consumo di energia e acqua)						
... sta lavorando per assicurare la sostenibilità sociale (es. autenticità culturale società inclusiva)						
... sta traendo vantaggio dal sapere derivante dai big data (link che spiega il significato di big data)						
... sta usando canali di marketing digitale						
... è preparata ad affrontare il crescente problema della salute e del benessere						
... è preparata ad affrontare il cambiamento climatico						
... sta lavorando per assicurare la sostenibilità economica						
... sta lavorando per trarre vantaggio dall'economia collaborativa						

Sezione 4: Ciclo di vita della destinazione

Considerando la figura seguente, indichi cortesemente in quale fase (da 1 a 7) Lei percepisce la Sua regione si trovi in merito allo sviluppo turistico: _____





Note:

1. **Exploration:** poche visite turistiche, territorio non sfruttato e pochi servizi esistenti
 2. **Involvement:** alcuni servizi per turisti, riconoscimento di una stagione turistica
 3. **Development:** presenza di alcune campagne promozionali per l'area. L'area diventa riconosciuta come destinazione turistica
 4. **Consolidation:** la crescita dei flussi turistici è più debole. Presenza di conflitti tra turisti e comunità ospitante
 5. **Stagnation:** i servizi per turisti possono andare in declino e diventare obsoleti. Il numero di turisti può calare
 6. **Decline:** se la destinazione non si rinnova (fase 6) entra nella fase di declino. La popolazione perde i posti di lavoro nel settore turistico. L'immagine dell'area peggiora.
 7. **Rejuvenation:** investimenti e modernizzazione nella destinazione per accrescere in numero di attrazioni turistiche
- Fonte: Butler (1980)

Sezione 5: Esternalità turistiche

8. Indichi cortesemente quanto Lei si trova d'accordo con le seguenti affermazioni riguardanti gli **impatti positivi** del turismo sulla Sua regione.

Il turismo...

	Molto in disaccordo	In disaccordo	Né d'accordo né in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
... crea lavoro per i residenti						
... incrementa il livello degli stipendi e lo standard di vita						
... crea nuovi mercati per i nostri prodotti locali						
... crea benefici per altre attività economiche della mia regione						
... aiuta a sviluppare migliori infrastrutture e trasporti pubblici						
... aiuta a preservare l'ambiente e il patrimonio naturale della nostra regione						
... aiuta a preservare il patrimonio culturale della nostra regione						
... incrementa il numero di eventi culturali e ricreativi per i residenti						
... migliora la qualità della vita dei residenti						



... aiuta a preservare l'autenticità socio-culturale e l'identità storica della nostra regione						
... stimola lo scambio culturale						

2. Indichi cortesemente quanto è d'accordo con le seguenti affermazioni riguardanti gli **impatti negativi** del turismo sulla Sua regione.

Il turismo...

	Molto in disaccordo	In disaccordo	Né d'accordo né in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
... incrementa i prezzi di beni e servizi per i residenti						
... aumenta il valore dei beni immobili (prezzo della terra e delle abitazioni)						
... causa l'esclusione di altre attività economiche (crowding out)						
... produce a lungo termine effetti negativi sull'ambiente						
... incrementa l'inquinamento dell'acqua						
... aumenta altri tipi di inquinamento (acustico, dell'aria, del suolo)						
... causa sovrasviluppo (relativamente al costruito)						
... causa sovraffollamento						
... causa sovrautilizzo delle risorse naturali e ricreative						
... incrementa la criminalità						
... mette sotto forte pressione l'utilizzo della terra e causa la perdita dei valori estetici del paesaggio						

Sezione 6: Sostenibilità dello sviluppo turistico

Settore privato (se il rispondente rappresenta uno stakeholder del settore privato)

Pratiche di sostenibilità incorporate

1. In che misura ha incorporato ognuna delle seguenti pratiche sostenibili nelle sue operazioni aziendali?

	In grande misura	In qualche misura	Per nulla
Assumere persone del luogo per posizioni lavorative			
Acquistare prodotti da fornitori locali			
Creare rapporti aziendali tra attività turistiche e altre attività economiche nella Sua regione			
Acquistare da aziende con certificazioni green (per il rispetto dell'ambiente)			
Ridurre e gestire le emissioni di gas serra			
Gestire, ridurre e riciclare i rifiuti solidi (es. compostaggio dei rifiuti)			



Ridurre il consumo di acqua dolce (es. uso di un sistema di gestione dell'acqua)			
Gestire lo spreco di acqua			
Ridurre il rumore			
Essere efficienti dal punto di vista energetico (es. uso di illuminazione a basso consumo energetico)			
Uso di fonti di energia rinnovabili (es. solari, eoliche,...)			
Uso di prodotti rispettosi per l'ambiente per la propria azienda (es. materiali biodegradabili, carta riciclata)			
Limitare l'accesso dei visitatori alle risorse naturali sensibili			
Limitare l'accesso dei visitatori alle risorse storico-culturali sensibili			
Preservare l'identità storico-culturale			
Implementare programmi di educazione ambientale per i visitatori			
Formare ed educare gli impiegati verso pratiche sostenibili			
Ottenere una certificazione green			
Donare fondi o servizi in natura ad iniziative per il rispetto dell'ambiente			
Stabilire una cultura green nel luogo di lavoro (es. incoraggiare il car-pooling o l'uso della bicicletta per raggiungere il posto di lavoro)			

Barriere e sfide

2. In quale misura ognuna delle seguenti barriere ha avuto impatti sulla Sua abilità di adottare pratiche turistiche sostenibili nelle sue operazioni?

	In grande misura	In qualche misura	Per nulla
Mancanza di disponibilità monetaria per fare investimenti (es. in attrezzature, rinnovamenti, sistemi...)			
Mancanza di programmi e incentivi per la sostenibilità (es. incentivi governativi)			
Mancanza di tempo per pianificare la sostenibilità a causa di altre priorità aziendali			
Accesso limitato a fornitori che vendono prodotti sostenibili (es. cibo organico, combustibili alternativi, materiali biodegradabili...)			
Mancanza di informazioni su come implementare la sostenibilità			
Mancanza di impegno verso la necessità di pratiche turistiche sostenibili			
Mancanza di un'appropriata regolamentazione			
Bassa importanza assegnata dai clienti alla sostenibilità			
Altro: _____			

Settore pubblico o organizzazioni della società civile (se il rispondente rappresenta uno stakeholder del settore pubblico o di un'organizzazione della società civile)

Lo sviluppo turistico nel rispetto della sostenibilità



1. Indichi cortesemente quanto Lei si trova d'accordo con ognuna delle seguenti frasi in merito allo sviluppo turistico nella Sua regione:

	Molto in disaccordo	In disaccordo	Nè d'accordo nè in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
In generale, gli impatti dello sviluppo turistico e delle proposte turistiche sono considerate un problema						
Le questioni di sostenibilità, comprese quelle relative alle risorse limitate, sono tenute in considerazione nei piani di sviluppo turistico						
Gli sviluppi turistici individuali sono controllati da effettivi processi di pianificazione dell'uso della terra						
La valutazione di impatti ambientali e di sostenibilità è applicata allo sviluppo turistico in maniera efficace						
Strumenti economici sono utilizzati per influenzare la sostenibilità dello sviluppo turistico						
Coloro che sviluppano progetti per la sostenibilità hanno a disposizione e ricevono consigli/consulenze per i loro progetti						

Le operazioni turistiche incontrano gli standard di sostenibilità

2. Indichi cortesemente quanto Lei si trova d'accordo con ognuna delle seguenti frasi in merito alle operazioni turistiche nella Sua regione:

	Molto in disaccordo	In disaccordo	Nè d'accordo nè in disaccordo	D'accordo	Molto d'accordo	Non lo so/ non so misurarlo
I regolamenti riguardo all'impatto ambientale delle operazioni turistiche sono in atto e sono implementati						
In generale, i fornitori di servizi turistici si stanno muovendo per migliorare la sostenibilità delle loro operazioni						
I tour operator stanno prendendo in considerazione le questioni di sostenibilità nei prodotti che promuovono e nelle informazioni che diffondono						
Strumenti economici sono utilizzati per influenzare la sostenibilità delle operazioni turistiche						
Le certificazioni sono utilizzate come strumento per identificare la conformità delle aziende agli standard di sostenibilità						
Le aziende turistiche sono fornite di attività di capacity building e di consulenze per l'aumento della sostenibilità						



Sono state intraprese azioni per rendere consapevoli i turisti delle questioni di sostenibilità all'interno del Paese e per influenzare i loro comportamenti e le loro attività						
---	--	--	--	--	--	--

3. In quale misura la Sua regione ha incorporato ognuna delle seguenti pratiche sostenibili?

	In grande misura	In qualche misura	Per nulla
Limitare l'accesso dei visitatori alle risorse naturali sensibili			
Limitare l'accesso dei visitatori alle risorse storico-culturali sensibili			
Preservare l'identità storico-culturale			
Implementare programmi di educazione ambientale per i visitatori			
Formare ed educare gli impiegati verso pratiche sostenibili			
Donare fondi o servizi in natura ad iniziative per il rispetto dell'ambiente			
Utilizzare l'opinione dei residenti come supporto quando vengono prese decisioni riguardanti lo sviluppo turistico			



Questionário aos *stakeholders* do turismo

Informação aos participantes

Enquanto *stakeholder-chave* do turismo local, convidamo-lo a participar num inquérito sobre as dinâmicas e tendências do turismo na zona MED. Este inquérito visa identificar as dinâmicas regionais e tendências que afetam a área MED e simultaneamente aferir o impacto que as tendências globais possam ter no desenvolvimento sustentável do turismo.

Este inquérito é uma componente importante do projeto ShapeTourism – Novas formas e determinantes para o sector do turismo: apoiar a decisão, coordenar planos e assegurar a sustentabilidade. O questionário levará cerca de 15 minutos a preencher.

A participação é inteiramente voluntária e em caso algum será prejudicado se decidir não participar. Contudo, esta é uma oportunidade única para dar a sua opinião numa pesquisa transnacional que tem como objetivo produzir informação para promover o turismo sustentável. Este inquérito visa produzir resultados que possam ser utilizados por todos os *stakeholders* do turismo como forma de apoiar a tomada de decisão a fim de induzir mudanças nas políticas, práticas empresariais e comportamento dos consumidores no sentido de tornar o sector do turismo mais sustentável. A pesquisa decorre até ao dia 31 de julho de 2017. Pode concluir o preenchimento do questionário em qualquer momento durante este período temporal. Se a sua organização está localizada em mais do que uma NUTS III, irá receber mais do que um questionário, uma vez que solicitamos o preenchimento de um questionário por região NUTS III.

Todas as respostas são confidenciais. Através da participação neste inquérito, está a autorizar a sua participação neste projeto de investigação. Os resultados desta pesquisa estarão disponíveis no site do projeto na plataforma Interreg MED: www.shapetourism.eu. Os resultados desta pesquisa também podem surgir em artigos de revistas científicas e conferências.

Secção 1: Características pessoais e organizacionais

2. Região onde se situa a organização (se a sua organização está localizada em mais do que uma NUTS III, ser-lhe-á solicitado o preenchimento de um questionário por região NUTS III)

_____ [incluir uma lista: NUTSIII]

2. Idade: _____

3. Género:

- ☐ Masculino
☐ Feminino

4. Habilitações literárias:

- ☐ Ensino básico
☐ Ensino secundário
☐ Licenciatura, mestrado ou doutoramento

[Se respondeu licenciatura, mestrado ou doutoramento] Área: _____

5. Número de anos de experiência relacionada com o sector do turismo (emprego ou outro): _____

6. Tipologia de *stakeholder-chave* que está a representar:

- ☐ Sector público (nacional, regional ou local)
☐ Sector privado (operador turístico, operador de transportes, alojamento, agente de viagens, atração turística)



- ☐ Organização da sociedade civil (por exemplo, organizações não-governamentais, fundações, associações para a proteção ambiental, vida selvagem, direitos humanos ou direitos dos trabalhadores)

7. O seu papel na organização:

- ☐ Presidente/CEO/diretor/ proprietário da empresa
☐ Membro de gestão de topo
☐ Membro de gestão intermédia
☐ Outro

8. Indique o nível ao qual a sua organização opera:

- ☐ Local
☐ Regional
☐ Nacional
☐ Internacional

Secção 2: Tendências e dinâmicas do turismo

1. Por favor, identifique os três principais concorrentes da sua região na lista seguinte:

- Concorrente 1 (incluir uma lista: Países – NUTSIII)
- Concorrente 2 (incluir uma lista: Países – NUTSIII)
- Concorrente 3 (incluir uma lista: Países – NUTSIII)

2. Tendo em mente a sua região enquanto um destino de turismo e refletindo sobre o período de 2014 a 2016, indique o seu grau de concordância com as seguintes afirmações:

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
A minha região está a investir mais no turismo este ano						
O turismo está a criar mais empregos e a recrutar mais trabalhadores na minha região este ano						
A procura turística para a minha região está a aumentar este ano						
A oferta turística da minha região está a aumentar este ano						
A minha região está a diversificar a oferta turística este ano						
A minha região está a reduzir os preços para incentivar as vendas este ano						
A minha região está a aumentar os esforços de marketing este ano para atrair mais turistas						
A minha região está a promover-se este ano em novos						



mercados/segmentos						
A minha região está a diversificar os seus canais de distribuição este ano						

Secção 3: Reações locais às tendências globais para a sustentabilidade do turismo

Por favor, indicar o seu grau de concordância com as seguintes afirmações:

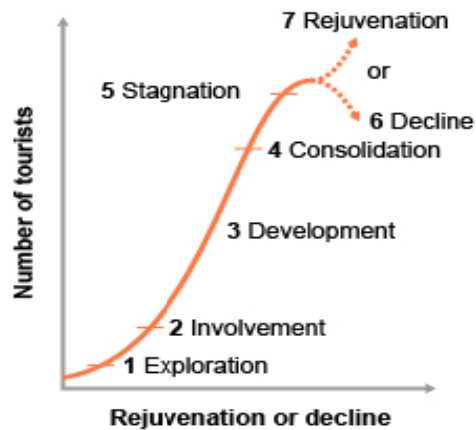
A minha região ...

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
... está a trabalhar para enfrentar a entrada de novos destinos concorrentes						
... está a trabalhar para lidar com uma possível ameaça terrorista						
... está a trabalhar para garantir a sustentabilidade ambiental (por exemplo, reduzindo o consumo de energia e água)						
... está a trabalhar para garantir a sustentabilidade social (por exemplo, autenticidade cultural, sociedade inclusiva)						
... está a tirar proveito do conhecimento gerado por big data (link explicando o significado de big data)						
... está a utilizar os canais de marketing digitais						
... está preparada para ir ao encontro da crescente preocupação com a saúde e bem-estar						
... está preparada para enfrentar as mudanças climáticas						
... está a trabalhar para garantir a sustentabilidade económica						
... está a trabalhar para tirar proveito da economia colaborativa						

Secção 4: O ciclo de vida do destino

Tendo em consideração a figura abaixo, por favor, indique, de acordo a sua perceção, em que fase (1 a 7) a sua região NUTS III se encontra em termos de desenvolvimento do turismo: _____





Nota:

1. **Exploração:** Reduzido número de turistas, lugar autêntico e reduzido número de equipamentos turísticos.
2. **Envolvimento:** Construção de alguns equipamentos para fins turísticos, identificação de uma época turística.
3. **Desenvolvimento:** A região começa a ser promovida. A região é reconhecida como um destino turístico.
4. **Consolidação:** O crescimento em número de turistas torna-se mais fraco. Surgimento de alguns conflitos entre residentes e turistas.
5. **Estagnação:** Alguns equipamentos turísticos podem apresentar sinais de desgaste e tornarem-se velhos. O número de turistas pode apresentar um declínio.
6. **Declínio:** Se o destino não for rejuvenescido (fase 6) então entrará em declínio. As pessoas perdem os seus empregos relacionados com o turismo. A imagem do destino é afetada.
7. **Rejuvenescimento:** Investimento e modernização do destino para aumentar o número de atrações turísticas.

Fonte: Butler (1980)

Secção 5: Externalidades do turismo

9. Por favor, indique o seu grau de concordância com as seguintes afirmações sobre os **impactos positivos** do turismo na sua região.

O turismo ...

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
... cria empregos para os residentes						
... aumenta o nível de rendimento e o nível de vida						
... cria novos mercados para os nossos produtos locais						
... beneficia outras atividades económicas na minha região						
... ajuda a desenvolver melhores infraestruturas e transportes públicos						
... ajuda a preservar o ambiente natural e o património natural da nossa região						
... ajuda a preservar o património cultural da nossa região						



... aumenta o número de eventos culturais e de lazer para os residentes						
... melhora a qualidade de vida dos residentes						
... ajuda a preservar a autenticidade sociocultural e a identidade histórica da nossa região						
... incentiva o intercâmbio cultural						

2. 1. Por favor, indique o seu grau de concordância com as seguintes afirmações sobre os **impactos negativos** do turismo na sua região.

O turismo...

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
... aumenta os preços de bens e serviços para os residentes						
... aumenta o valor do imobiliário (preço dos terrenos e da habitação)						
... causa o abandono de outras atividades económicas						
... produz efeitos negativos a longo prazo no ambiente						
... aumenta a poluição da água						
... aumenta outros tipos de poluição (ar, ruído, solo)						
... causa excesso de construção						
... causa sobrelotação						
... causa desgaste dos recursos naturais e de lazer						
... aumenta a criminalidade						
... coloca forte pressão sobre o uso dos solos e causa a perda de valores estéticos da paisagem						

Secção 6: Sustentabilidade do desenvolvimento turístico

Sector privado (se o respondente representar um stakeholder pertencente ao sector privado)

Práticas de sustentabilidade incorporadas nas operações empresariais

1. Em que medida incorporou as seguintes práticas sustentáveis nas suas operações empresariais?

	Em grande medida	Em certa medida	De modo algum
Recrutar e contratar pessoas locais			
Comprar produtos a fornecedores locais			
Estabelecimento de vínculos empresariais dentro do sector do turismo e com outras atividades económicas da sua região			



Compras a empresas com certificação de práticas verdes			
Reduzir e gerir as emissões de gases de efeito estufa			
Gerir, reduzir e reciclar resíduos sólidos (por exemplo, compostagem de resíduos)			
Reduzir o consumo de água potável (por exemplo, utilização de um sistema de gestão de água de baixa utilização)			
Gestão de águas residuais			
Reduzir o ruído			
Promover a eficiência energética (por exemplo, utilização de iluminação de consumo energético eficiente)			
Usar fontes de energia renováveis (por exemplo, energia solar, eólica, etc.)			
Usar produtos verdes (por exemplo, materiais biodegradáveis, papel reciclado, etc.)			
Limitar o acesso de visitantes a recursos naturais de elevada sensibilidade			
Limitar o acesso de visitantes a recursos culturais e históricos de elevada sensibilidade			
Preservar a identidade cultural e histórica			
Implementar programas de educação ambiental para os visitantes			
Treinar e educar os funcionários sobre as práticas de sustentabilidade			
Obter uma "certificação verde"			
Doar fundos ou serviços/bens a iniciativas verdes			
Estabelecer uma "cultura verde" no local de trabalho (por exemplo, incentivando a partilha do automóvel, utilização da bicicleta para ir trabalhar)			

Barreiras e desafios

2. Em que medida cada uma das seguintes barreiras tem impacto na sua capacidade em adotar práticas de turismo sustentável nas suas operações?

	Em grande medida	Em certa medida	De modo algum
Falta de dinheiro disponível para investir (por exemplo, em equipamentos, renovações, sistemas, etc.)			
Falta de programas de incentivo à sustentabilidade (por exemplo, incentivos do governo)			
Falta de tempo para planear medidas de sustentabilidade devido a outras prioridades empresariais			
Acesso limitado a fornecedores que vendam produtos sustentáveis (por exemplo, alimentos orgânicos, combustíveis alternativos, produtos biodegradáveis, etc.)			
Falta de informação sobre como ser mais sustentável			
Falta de compromisso com a necessidade de práticas de turismo sustentável			
Falta de legislação adequada			
Baixa importância atribuída pelos clientes à sustentabilidade			
Outra: _____			



Sector público ou organização da sociedade civil (se o respondente representar um stakeholder do sector público ou de uma organização da sociedade civil)

O desenvolvimento do turismo respeita a sustentabilidade

1. Por favor, indique o grau de concordância com as seguintes afirmações sobre o desenvolvimento do turismo na sua região:

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
Em geral, os impactos do desenvolvimento do turismo são considerados um problema						
Questões de sustentabilidade, incluindo restrições dos recursos, são tidas em consideração nos planos de turismo						
Controle de projetos turísticos individuais mediante planeamento de uso do solo						
A avaliação dos impactos ambientais/sustentabilidade é efetivamente aplicada ao desenvolvimento do turismo						
Instrumentos económicos são utilizados para influenciar a sustentabilidade dos empreendimentos turísticos						
Existência e disponibilização de aconselhamento aos promotores turísticos sobre a sustentabilidade dos seus projetos						

As operações turísticas correspondem aos padrões de sustentabilidade

2. Por favor, indique o seu grau de concordância com as seguintes afirmações sobre as operações turísticas na sua região:

	Discordo completamente	Discordo	Nem concordo nem discordo	Concordo	Concordo completamente	Não sei/Não respondo
Existência e implementação de regulamentação relativas ao impacto ambiental das operações turísticas						
Em geral, os prestadores de serviços turísticos estão a tomar medidas para melhorar a sustentabilidade das suas operações						
Os operadores turísticos têm em consideração as questões de sustentabilidade nos produtos que promovem e na						



informações que veiculam						
Utilização de instrumentos económicos para influenciar a sustentabilidade das operações turísticas						
Utilização de sistemas de certificação para identificar a conformidade das práticas com os padrões de sustentabilidade						
Disponibilização e promoção de aconselhamento às empresas turísticas em relação à capacitação para reforçar a sustentabilidade das operações						
Foram tomadas medidas para consciencializar os turistas relativamente às questões de sustentabilidade e influenciar as suas atividades						

3. Em que medida a sua região incorporou as seguintes práticas sustentáveis?

	Em grande medida	Em certa medida	De modo algum
Limitar o acesso dos visitantes a recursos naturais de elevada sensibilidade			
Limitar o acesso dos visitantes a recursos culturais e históricos de elevada sensibilidade			
Preservar a identidade cultural e histórica			
Implementar programas de educação ambiental para os visitantes			
Treinar e educar os funcionários sobre as práticas de sustentabilidade			
Doar fundos ou serviços/bens a iniciativas verdes			
Utilizar a opinião dos residentes para apoiar as decisões sobre o desenvolvimento do turismo			



Cuestionario a Stakeholders Turísticos

Información para las personas participantes

Como stakeholder clave del turismo en la provincia, le invitamos amablemente a participar en esta encuesta cuyo objetivo es identificar las dinámicas regionales y las tendencias que afectan al área MED, y evaluar el impacto que los cambios globales pueden tener en un desarrollo turístico sostenible.

Rellenar este cuestionario le llevará aproximadamente 15 minutos. Este cuestionario es una fase importante del proyecto denominado *"ShapeTourism - New shape and drives for the tourism sector: supporting decision, integrating plans and ensuring sustainability"* que ha sido cofinanciado por el Fondo Europeo de Desarrollo Regional.

La participación es totalmente voluntaria, pero para nosotros es una gran oportunidad tener su opinión en esta encuesta transnacional, que proporcionará información para promover la sostenibilidad turística. Los resultados que se obtengan podrán ser usados por todos los stakeholders turísticos como apoyo en su toma de decisiones para cambiar políticas, prácticas empresariales y comportamientos del consumidor hacia un sector turístico más sostenible. La encuesta estará operativa hasta el 31 de Julio de 2017. La puede completar durante ese tiempo en cualquier momento. Si su organización está presente en más de una provincia, recibirá más de un cuestionario y le pediremos que rellene uno por cada provincia.

Todas las respuestas son confidenciales. Al participar en esta encuesta está dando su consentimiento a formar parte de esta investigación. Los resultados de la investigación estarán disponibles en la website del proyecto en la plataforma Interreg MED: www.shapetourism.eu. Los resultados de la investigación pueden también aparecer en publicaciones de revistas y congresos.

Sección 1: Características personales y de la organización

8. Provincia en la que se localiza su organización (si está localizada en más de una provincia, se le pedirá que rellene una para cada provincia).

_____ [incluye una lista desplegable de provincias]

2. Edad: _____

3. Sexo:

☐ Hombre

☐ Mujer

4. Nivel educativo:

☐ Educación Básica

☐ Bachillerato

☐ Licenciatura, grado, master o doctorado

[Si selecciona licenciatura, grado, master o doctorado] Área: _____

5. Número de años de experiencia relacionada con el sector (empleo u otros): _____

6. Tipo de stakeholder clave al que representa:

☐ Sector Público (gobierno nacional, regional o local)



- ☐ Sector privado (tour operadores, operadores de transporte, sector alojamiento, agencias de viaje, atracciones turísticas)
- ☐ Organizaciones de la sociedad Civil (por ejemplo, organizaciones no gubernamentales, organizaciones benéficas de conservación del medioambiente, de la fauna, de los derechos humanos y de los derechos de los trabajadores)

7. Su rol en la organización:

- ☐ Presidente/CEO/director/propietario
- ☐ Directivo Senior
- ☐ Directivo intermedio
- ☐ Otro

8. ¿A qué nivel opera su organización?

- ☐ Local
- ☐ Regional
- ☐ Nacional
- ☐ Internacional

Sección 2: Dinámicas y tendencias del Turismo

1. Por favor, identifique los 3 principales competidores de su provincia de la siguiente lista:

- Competidor 1 (incluye una lista desplegable: País – Provincia (NUTSIII))
- Competidor 2 (incluye una lista desplegable: País – Provincia (NUTSIII))
- Competidor 3 (incluye una lista desplegable: País – Provincia (NUTSIII))

2. Considerando su provincia como destino turístico y reflexionando sobre el periodo de 2014 a 2016, indique su nivel de acuerdo o desacuerdo con las siguientes afirmaciones:

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
En mi provincia se está invirtiendo más en turismo este año						
El turismo está creando más trabajo e incorporando más trabajadores en mi provincia este año						
La demanda turística de mi provincia está creciendo este año						
La oferta turística de mi provincia está creciendo este año						
Mi provincia está diversificando la oferta turística este año						
Mi provincia está bajando precios para estimular las ventas este año						
Mi provincia está incrementando los esfuerzos de marketing						



este año para atraer más turistas						
Mi provincia se está promocionando este año en nuevos mercados /segmentos						
Mi provincia está diversificando sus canales de distribución este año						

Sección 3: Reacciones locales a las tendencias globales para la sostenibilidad del turismo

Por favor, indique su grado de acuerdo con cada una de las siguientes afirmaciones:

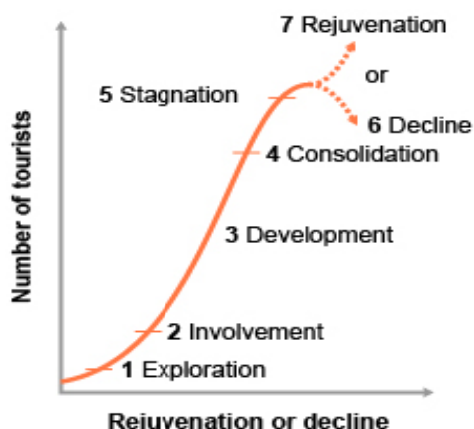
Mi provincia...

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
... está trabajando para hacer frente a la entrada de nuevos destinos competidores						
... está trabajando para gestionar un posible ataque terrorista						
... está trabajando para asegurar la sostenibilidad ambiental (por ejemplo, reduciendo el consumo de energía y de agua)						
... está trabajando para asegurar la sostenibilidad social (por ejemplo, la autenticidad cultural, sociedad inclusiva)						
... está aprovechando el conocimiento que posibilita el big data						
... está usando los canales de marketing digital						
... está preparada para satisfacer la creciente preocupación por la salud y el bienestar						
... está preparada para enfrentarse al cambio climático						
... está trabajando para asegurar la sostenibilidad económica						
... está trabajando para aprovechar la economía colaborativa						

Sección 4: Ciclo de vida del destino

Considerando la figura de abajo, indique en qué fase (de 1 a 7) usted percibe que está su provincia en términos de desarrollo turístico: _____





Nota:

1. **Exploración:** Reducido número de visitas turísticas, lugar intacto y existencia de escasos equipamientos.
 2. **Implicación:** Algunos servicios de apoyo al turista, reconocimiento de la temporada turística.
 3. **Desarrollo:** Algunas campañas publicidad del área. El área empieza a reconocerse como destino.
 4. **Consolidación:** Se reduce el crecimiento del número de turistas. Surgen algunos conflictos entre residentes y turistas.
 5. **Estancamiento:** Los atractivos e instalaciones para turistas pueden deteriorarse. El número de turistas empieza a disminuir.
 6. **Declive:** Si el destino no se rejuvenece (etapa 6) empieza el declive. Se pierden los trabajos en turismo. La imagen del área se deteriora.
 7. **Rejuvenecimiento:** Inversión y modernización del destino para incrementar el número de atracciones turísticas.
- Fuente: Butler (1980)

Sección 5: Externalidades del turismo

10. Por favor, indique su grado de conformidad con las siguientes afirmaciones relacionadas con los **impactos positivos** del turismo en su provincia.

El turismo...

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
... crea trabajo para la población local						
...incrementa los ingresos y mejora el nivel de vida						
... crea nuevos mercados para nuestra producción local						
... beneficia a otras actividades económicas de la provincia						
... ayuda a mejorar las infraestructuras y el transporte público						
... ayuda a preservar el entorno natural y el patrimonio natural de nuestra provincia						
... ayuda a preservar el patrimonio cultural de nuestra provincia						
... incrementa el número de eventos culturales y de entretenimiento para los residentes locales						



... mejora la calidad de vida de los residentes						
... ayuda a preservar la autenticidad socio-cultural y la identidad histórica de nuestra región						
... estimula el intercambio cultural						

2. Por favor, indique su nivel de acuerdo con las siguientes afirmaciones relativas a los **impactos negativos** del turismo en su provincia.

El turismo...

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
... incrementa los precios de los productos para los residentes						
... eleva el valor inmobiliario (precio del suelo y de las viviendas)						
... provoca desplazamientos de otras actividades económicas						
... produce efectos negativos a largo plazo en el entorno						
... aumenta la contaminación del agua						
... incrementa otros tipos de contaminación (del aire, del suelo, acústica)						
... provoca un desarrollo excesivo (con respecto a la construcción)						
... genera masificación						
... causa sobreutilización de recursos naturales y recreativos						
... incrementa el número de delitos						
... genera fuertes presiones en el uso del suelo y pérdida de valores estéticos del paisaje						

Sección 6: Sostenibilidad y desarrollo del turismo

Sector Privado (si la persona encuestada representa a una organización del sector privado)

Prácticas de sostenibilidad incorporadas

1. ¿En qué medida ha incorporado cada una de las siguientes prácticas sostenibles en sus operaciones de negocio?

	En gran medida	En cierta medida	En absoluto
Reclutamiento y contratación de personal local			
Compra de productos a proveedores locales			
Creación de vínculos comerciales entre turismo y otras actividades			



económicas de su provincia			
Compra a empresas con certificados de prácticas ecológicas			
Reduce y gestiona las emisiones de gases de efecto invernadero			
Gestiona, reduce y recicla residuos sólidos (por ejemplo, compostaje de residuos)			
Reduce el consumo de agua dulce (por ejemplo, uso de sistemas de bajo consumo de agua)			
Gestiona las aguas residuales			
Reduce ruidos			
Eficiencia energética (por ejemplo, uso de iluminación de bajo consumo)			
Uso de fuentes de energía renovable (por ejemplo solar, eólica, etc.)			
Uso de productos ecológicos en el negocio (por ejemplo, materiales biodegradable, papel reciclado, etc.)			
Limitar el acceso de visitantes a recursos naturales sensibles			
Limitar el acceso de visitantes a recursos culturales e históricos sensibles			
Preservar la identidad histórica y cultural			
Implementa programas de educación ambiental para visitantes			
Formar y educar a los empleados en prácticas sostenibles			
Obtener una "certificación ambiental"			
Donar fondos o servicios en especie a iniciativas medioambientales			
Establecer una "cultura medioambiental" en el puesto de trabajo (por ejemplo, estimulando el uso compartido de coches, el día de ir al trabajo en bicicleta)			

Barreras y retos

2. ¿En qué medida su capacidad para adoptar prácticas de turismo sostenible en sus operaciones de negocio se ven afectadas por cada una de las siguientes barreras?

	En gran medida	En cierta medida	En absoluto
Falta de disponibilidad de dinero para invertir (por ejemplo, en equipamientos, renovaciones, sistemas, etc.)			
Falta de programas de incentivos de la sostenibilidad (por ejemplo, incentivos gubernamentales)			
Falta de tiempo para planificar la sostenibilidad debido a otras prioridades en el negocio.			
Acceso limitado a proveedores que vendan productos sostenibles (por ejemplo comida orgánica, combustibles alternativos, artículos biodegradable, etc.)			
Falta de información sobre la forma de ser más sostenible			
Falta de compromiso con la necesidad de prácticas de turismo sostenible			
Carencia de una legislación apropiada			
Poca importancia concedida por los clientes a la sostenibilidad			



Otros: _____			
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Organizaciones del sector Público o de la sociedad civil (si la persona encuestada representa a una organización del sector público o de la sociedad civil)

El desarrollo del turismo respeta la sostenibilidad

1. Por favor, indique el grado de acuerdo con cada una de las siguientes afirmaciones relativas al desarrollo del turismo en su provincia:

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
En general, los impactos de los proyectos y desarrollos turísticos se consideran un problema						
Las cuestiones de sostenibilidad, incluyendo las restricciones de recursos, se tienen en cuenta en los planes turísticos						
Los desarrollos turísticos individuales se controlan mediante procesos efectivos de planificación del uso del suelo						
Se aplica de forma efectiva a los desarrollos del turismo una evaluación del impacto medioambiental /o de sostenibilidad						
Se usan instrumentos económicos para influir en la sostenibilidad de los desarrollos turísticos						
Se proporciona consejo a los promotores sobre la sostenibilidad de sus proyectos						

Las actividades turísticas cumplen los estándares de sostenibilidad

2. Por favor, indique su grado de acuerdo con cada una de las siguientes afirmaciones sobre las actividades turísticas en su provincia:

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo	No sé/no lo puedo valorar
Hay establecidas regulaciones relativas al impacto medioambiental de las actividades turísticas						
En general, los proveedores de servicios turísticos están dando pasos para mejorar la sostenibilidad de sus operaciones						
Los tour-operadores están considerando las cuestiones de						



sostenibilidad en los productos que promocionan y en la información que proporcionan						
Se están utilizando instrumentos económicos para influir en la sostenibilidad de las actividades turísticas						
Se están utilizando programas de certificación para identificar el cumplimiento de las empresas con los estándares de sostenibilidad						
Se apoya la creación de capacidades y se proporciona asesoramiento a los negocios turísticos para mejorar la sostenibilidad de sus operaciones						
Se han tomado medidas para concienciar a los turistas de las cuestiones de sostenibilidad y para influir en su comportamiento						

3. ¿En qué medida su provincia ha incorporado cada una de las siguientes prácticas sostenibles?

	En gran medida	En cierta medida	En absoluto
Limitar el acceso de visitantes a recursos naturales sensibles			
Limitar el acceso de visitantes a recursos culturales e históricos sensibles			
Preservar la identidad histórica y cultural			
Implementar programas de educación ambiental para visitantes			
Formar y educar a los empleados en prácticas sostenibles			
Donar fondos o servicios en especie a iniciativas medioambientales			
Usar la opinión de los residentes para apoyar decisiones sobre desarrollo turístico			



Anketa za turističke dionike

Podatci za sudionike

Kao ključnog lokalnog turističkog dionika, molimo vaše sudjelovanje u anketi o dinamici i trendovima turizma na Sredozemlju. Cilj ove ankete jest ustanoviti koja regionalna gibanja i trendovi utječu na Sredozemlje te procijeniti mogući učinak globalnih promjena na održivi turistički razvitak.

Za popunjavanje ove ankete potrebno je oko 15 minuta. Ova anketa je važna dionica u projektu ShapeTourism – Novi okvir i pogon za turistički sektor: podrška odlučivanju, povezivanje planova i osiguravanje održivosti, kojeg novčano podupire Europski fond za regionalni razvoj.

Sudjelovanje je potpuno dragovoljno i ni na koji način nećete biti u nepovoljnijem položaju ako odlučite ne sudjelovati. Istovremeno, imate jedinstvenu mogućnost izraziti vaše mišljenje u međunarodnoj anketi koja smjera proizvesti informacije za unaprjeđenje održivosti turizma. Ova anketa će dati rezultate koji će turistički dionici moći koristiti kao potporu pri donošenju odluka za izmjene politika, poslovne prakse i ponašanja potrošača u smjeru održivijeg turističkog sektora. Anketa se provodi do 31. lipnja 2017. Anketu možete ispuniti bilo kada tijekom navedenog razdoblja. Ako se vaša organizacija nalazi u više od jedne NUTS III regije/županije i primiti više od jedne ankete, molimo vas da popunite samo jednu anketu za čitavu NUTS III regiju.

Svi odgovori su povjerljivi i anonimni. Rezultati ovog istraživanja bit će dostupni na mrežnoj stranici projekta www.shapetourism.eu. Rezultati se također mogu pojaviti u znanstvenim časopisima i zbornicima znanstvenih kongresa.

1. dio: Osobna i organizacijska obilježja

8. Regija u kojoj se nalazi organizacija

_____ [including a drop down list: NUTSIII]

2. Dob: _____

3. Spol:

☐ muško

☐ žensko

4. Razina dovršenog obrazovanja:

☐ osnovna škola

☐ srednja škola

☐ diploma prvostupnika/VŠS/VSS, magistra ili doktorata

[Ako je odgovor diploma prvostupnika/VŠS/VSS, magistra ili doktorata] Područje: _____

5. Broj godina radnog ili drugog iskustva povezanog s turizmom: _____

6. Vrsta ključnog dionika kojeg predstavljate:

☐ Javni sektor (tijela državne, regionalne ili lokalne (samo)uprave)

☐ Privatni sektor (turoperator, prijevoznici, ugostitelji, turističke agencije, turističke znamenitosti)



☐ Organizacije civilnog društva (nevladine udruge, ekološke i druge zaklade; zaštita okoliša, životinja, ljudskih i radničkih prava)

7. Vaša uloga u organizaciji:

- ☐ Ravnatelj/predsjednik/direktor/vlasnik
☐ Viši rukovoditelj
☐ Rukovoditelj srednje razine
☐ Drugo

8. Koja je razina rada vaše organizacije?

- ☐ Lokalna
☐ Regionalna
☐ Državna
☐ Međunarodna

2. dio: Turistička gibanja i trendovi

1. Molimo odaberite tri glavna konkurenta vašoj regiji na sljedećem popisu:

- Konkurent 1 (including a drop down list: Country – NUTSIII)
- Konkurent 2 (including a drop down list: Country – NUTSIII)
- Konkurent 3 (including a drop down list: Country – NUTSIII)

2. Imajući u vidu vašu regiju kao turističko odredište i razmišljajući o razdoblju od 2014. do 2016., molimo naznačite razinu vašeg (ne)slaganja sa sljedećim tvrdnjama:

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti
U 2017. moja regija ulaže više u turizam						
U 2017. turizam stvara više radnih mjesta i zapošljava više djelatnika u mojoj regiji						
U 2017. raste turistička potražnja za mojom regijom						
U 2017. raste turistička ponuda u mojoj regiji						
U 2017. turistička ponuda moje regije je raznovrsnija						
U 2017. moja regija reže cijene da potakne prodaju						
U 2017. moja regija pojačava marketinške napore da privuče više turista						
U 2017. moja regija se promovira na/u novim tržištima / segmentima						
U 2017. moja regija širi svoje kanale prodaje						



3. dio: Lokalne reakcije na globalne trendove u održivosti turizma

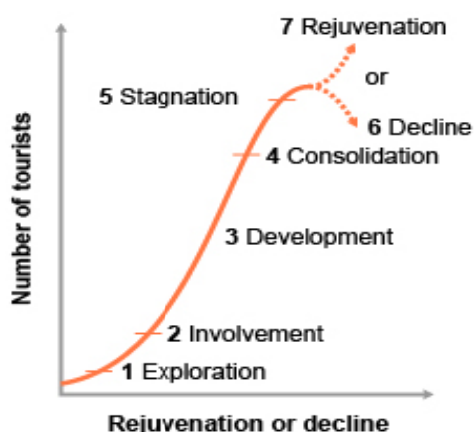
Molimo naznačite razinu vašeg (ne)slaganja sa svakom od sljedećih tvrdnji:

Moja regija ...

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti
...radi na suočavanju s ulaskom novih konkurentskih destinacija						
...radi na postupanju u slučaju mogućih terorističkih prijetnji						
...radi na osiguranju ekološke održivosti (npr. smanjenje potrošnje energije i vode)						
... radi na osiguranju društvene održivosti(npr. kulturološka izvornost, uključivo društvo)						
... koristi spoznaje koje omogućuju Veliki podaci (<i>Big Data, engl.</i>)						
... koristi kanale digitalnog marketinga						
...spremno reagira na trend rasta brige o zdravlju i dobrostanju						
... spremno se suočava sa klimatskim promjenama						
...radi na osiguranju gospodarske održivosti						
... radi na iskorištavanju ekonomije dijeljenja						

4. dio:Životni ciklus odredišta

Uzimajući u obzir donji prikaz, molimo naznačite u kojoj fazi (1 do 7) turističkog razvoja smatrate da je vaša NUTS III regija: _____



Tumač:

1. **Otkrivanje (eng. exploration):** Malobrojni turisti, nedirnut okoliš i mali broj turističkih objekata.



2. **Uključivanje (eng. involvement):** Postoje neki turistički objekti, nazire se turistička sezona.
 3. **Razvoj (eng. development):** Područje se počinje sustavno promovirati. Područje je prepoznato kao turističko odredište.
 4. **Konsolidacija (eng. consolidation):** Usporava rast turističkih dolazaka. Pojava napetosti između domaćeg stanovništva i turista.
 5. **Stagnacija (eng. stagnation):** Objekti za turiste nazaduju i stare. Broj posjetitelja opada.
 6. **Propadanje (eng. decline):** Ako se odredište ne pomladi (6. faza), propada. Stanovništvo gubi radna mjesta u turizmu. Predložba o području se pogoršava.
 7. **Pomlađivanje (eng. rejuvenation):** Ulaganje i moderniziranje odredišta u svrhu povećanja broja turističkih znamenitosti.
- Izvor: Butler (1980)

5. dio: Dodatni učinci turizma

11. Molimo naznačite razinu vašeg (ne)slaganja sa svakom od sljedećih tvrdnji o **pozitivnim učincima** turizma u vašoj regiji.

Turizam ...

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti
... stvara radna mjesta za lokalno stanovništvo						
... podiže razinu primanja i životni standard						
... stvara nova tržišta za naše lokalne proizvode						
... doprinosi drugim gospodarskim aktivnostima u mojoj regiji						
... doprinosi razvoju bolje infrastrukture i javnog prijevoza						
...doprinosi očuvanju prirodnog okoliša i prirodne baštine naše regije						
...doprinosi očuvanju kulturne baštine naše regije						
... povećava broj kulturnih i rekreacijskih događaja za lokalno stanovništvo						
... unaprjeđuje kvalitetu življenja stanovništva						
... doprinosi očuvanju društveno-kulturne izvornosti i povijesnog identiteta naše regije						
... potiče kulturološku razmjenu						

2. Molimo naznačite razinu vašeg (ne)slaganja sa svakom od sljedećih tvrdnji o **negativnim učincima** turizma u vašoj regiji.

Turizam...

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti



...podiže cijene dobara i usluga za stanovništvo						
...podiže vrijednost nekretnina (cijene zemljišta i stambenih objekata)						
... istiskuje druge gospodarske aktivnosti						
... proizvodi dugoročne negativne posljedice za okoliš						
...povećava onečišćenje vode						
...povećava druge vrste onečišćenja (zrak, buka, tlo)						
...uzrokuje preizgrađenost						
...uzrokuje gužve						
...uzrokuje prekomjerno korištenje prirodnih i rekreacijskih resursa						
... uzrokuje porast kriminala						
... stvara snažan pritisak na namjenu zemljišta i uzrokuje gubitak estetske vrijednosti krajobrazza						

6. dio: Održivost turističkog razvoja

Privatni sektor (ako je ispitanik dionik privatnog sektora)

Primjena mjera održivosti

1. U kolikom opsegu ste u vaše poslovanje ugradili svaku od sljedećih mjera održivosti?

	U velikom opsegu	Donekle	Nimalo
Regrutiranje i zapošljavanje lokalnog stanovništva			
Nabavka proizvoda od lokalnih dobavljača			
Izgradnja poslovnih veza unutar turističkih i drugih gospodarskih aktivnosti vaše regije			
Kupnja od tvrtki koje su certificirane u eko poslovanju			
Smanjenje i upravljanje ispuštanjem stakleničkih plinova			
Upravljanje, smanjenje i recikliranje čvrstog otpada (npr. kompostiranje otpada)			
Smanjenje uporabe pitke vode (npr. uporaba štednog vodno-gospodarskog sustava)			
Upravljanje otpadnim vodama			
Smanjenje buke			
Energetska učinkovitost (npr. uporaba štedne rasvjete)			
Uporaba obnovljivih izvora energije (npr. sunce, vjetar, itd.)			
Uporaba zelenih proizvoda u poslovanju (npr. biorazgradivi materijali, reciklirani papir, itd.)			
Ograničenje pristupa posjetiteljima osjetljivim prirodnim resursima			
Ograničenje pristupa posjetiteljima osjetljivim kulturološkim i povijesnim resursima			
Očuvanje kulturološke i povijesne posebnosti			



Provođenje programa ekološke edukacije posjetitelja			
Obuka i izobrazba djelatnika o mjerama održivosti			
Nabavka certifikata o eko-poslovanju			
Doniranje sredstava i usluga eko-inicijativama			
Uspostava 'eko-kulture' na radnom mjestu (npr. suprijevoz do posla ili dan dolaska na posao biciklom)			

Prepreke i izazovi

2. U kolikom opsegu svaka od sljedećih prepreka utjecala na vašu sposobnost ugradnje turističkih mjera održivosti u vaše poslovanje?

	U velikom opsegu	Donekle	Nimalo
Manjak novca za ulaganje (npr. kupnja opreme, sustava, preuređenje, itd.)			
Manjak programa poticanja održivosti (npr. državni poticaji)			
Manjak vremena za planiranje održivosti zbog drugih poslovnih prioriteta			
Ograničen pristup dobavljačima održivih proizvoda (npr. ekološka hrana, alternativna goriva, biorazgradivi artikli, itd.)			
Manjak informacija o načinima održivijeg poslovanja			
Nedostatna predanost mjerama održivosti			
Manjak odgovarajućeg zakonodavstva			
Naši kupci/korisnici održivosti pridaju nisku razinu važnosti			
Drugo: _____			

Javni sektor ili organizacije civilnog društva (ako je ispitanik dionik iz javnog sektora ili organizacije civilnog društva)

Razvoj turizma uvažavajući održivost

1. Molimo naznačite razinu vašeg (ne)slaganja sa svakom od sljedećih tvrdnji o razvitku turizma u vašoj regiji:

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti
Općenito, učinci turističkih razvojnih projekata i prijedloga se smatraju problematičnima						
Pitanja održivosti, uključujući resursna ograničenja, uvažavaju se pri turističkom planiranju						
Pojedinačni turistički razvojni projekti kontroliraju se učinkovitim postupcima planiranja namjene zemljišta						
Procjena utjecaja na okoliš/održivost učinkovito se primjenjuje na turističke razvojne projekte						
Ekonomskim instrumentima se utječe na održivost turističkih razvojnih projekata						



Savjeti u svezi održivosti turističkih projekata su dostupni i pružaju se ulagačima						
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Turistička poslovanje u skladu s pravilima održivosti

2. Molimo naznačite razinu vašeg (ne)slaganja sa svakom od sljedećih tvrdnji o turističkom poslovanju u vašoj regiji:

	U potpunosti se ne slažem	Ne slažem se	Niti se slažem niti ne slažem	Slažem se	U potpunosti se slažem	Ne znam/Ne mogu ocijeniti
Odredbe u svezi ekoloških učinaka turističkog poslovanja postoje i primjenjuju se						
Općenito, pružatelji turističkih usluga poduzimaju korake ka unaprjeđenju održivosti njihova poslovanja						
Turoperator i obraćaju pozornost na održivost u proizvodima koje promoviraju i podacima koje pružaju						
Ekonomskim instrumentima se utječe na održivost turističkog poslovanja						
Sustavi certificiranja koriste se radi identificiranja tvrtki koje udovoljavaju standardima održivosti						
Jačanje kapaciteta i savjeti za unaprjeđenje održivosti poslovanja pružaju se i promoviraju turističkim tvrtkama						
Poduzete su radnje da bi se turiste osvijestilo o pitanjima održivosti u državi i utjecalo na njihove aktivnosti						

3. U kolikom opsegu vaša regija primjenjuje svaku od sljedećih mjera održivosti?

	U velikom opsegu	Donekle	Nimalo
Ograničava pristup posjetiteljima osjetljivim prirodnim resursima			
Ograničava pristup posjetiteljima u osjetljivim kulturološkim i povijesnim resursima			
Čuva kulturološke i povijesne posebnosti			
Provodi programe ekološke edukacije posjetitelja			
Obučava i uči djelatnike o mjerama održivosti			
Donira sredstva i usluge eko inicijativama			
Uvažava stavove stanovništva za potporu odlukama o turističkom razvoju			

Hvala na Vašem vremenu i trudu

(Thank you for Your time and effort).



Vprašalnik za deležnike v turizmu

Informacije za udeležence

Kot lokalnega deležnika v turizmu vas prijazno vabimo, da sodelujete v anketi o MED dinamiki in trendih v turizmu. V tej anketi želimo določiti, katere regionalne dinamike in trendi vplivajo na MED območje in oceniti, kakšen učinek imajo globalne spremembe na razvoj trajnostnega turizma.

Za to anketo boste potrebovali približno 15 minut. Ta anketa je pomemben korak v projektu *ShapeTourism - Novi pristopi in gonilne sile v turizmu: podpora odločanju, celostno načrtovanje in zagotavljanje trajnosti*, ki ga sofinancira Evropski sklad za regionalni razvoj.

Sodelovanje je popolnoma prostovoljno in če se ne odločite za sodelovanje, ne boste nikakor prikrajšani. Obenem pa je to priložnost, da izrazite svoje mnenje v mednarodni raziskavi, ki zbira informacije, ki bodo spodbujale trajnostni turizem. Rezultati te ankete bodo na voljo vsem deležnikom v turizmu kot podpora pri odločanju za spremembe politik, poslovnih praks in vedenja potrošnikov v smeri proti bolj trajnostnemu turističnemu sektorju. Anketa bo aktivna do 31. julija 2017. Anketo lahko izpolnite kadar koli do navedenega roka. Če se vaša organizacija nahaja v več kot enem NUTS III, boste prejeli več kot eno anketo in vas prosimo, da izpolnite eno anketo za vsako regijo v NUTS III.

Vsi odgovori so zaupni. Z udeležbo v anketi se strinjate, da sodelujete v tej raziskavi. Rezultati raziskave bodo na voljo na spletni strani platforme Interreg MED: www.shapetourism.eu. Rezultati so lahko objavljeni tudi v revijah in konferenčnih publikacijah.

Del 1: Značilnosti osebe in organizacije

8. Regija, kjer deluje organizacija (če se vaša organizacija nahaja v več kot enem NUTS III, boste prejeli več kot eno anketo in vas prosimo, da izpolnite eno anketo za vsako regijo v NUTS III)

_____ [vključno s spustnim seznamom: NUTSIII]

2. Starost: _____

3. Spol:

- ☐ Moški
☐ Ženska

4. Dosežena izobrazba:

- ☐ Osnovna šola
☐ Srednja šola
☐ Višja, visoka šola, magisterij, doktorat

[Če izberete možnost višja, visoka šola, magisterij, doktorat] Področje: _____

5. Število let izkušenj v turistični industriji (zaposlitev ali drugo): _____

6. Vrsta ključnega deležnika, ki ga predstavljate:

- ☐ Javni sektor (državna, regionalna ali lokalne vladne službe)
☐ Zasebni sektor (organizatorji potovanja, prevozniki, gostinski sektor, potovalne agencije, turistične atrakcije)
☐ Organizacije civilne družbe (npr. nevladne organizacije, skladi in dobrodelne ustanove za okolje, živali, človeške



pravice in pravice delavcev)

7. Vaša vloga v organizaciji:

- ☐ Predsednik/izvršni direktor/direktor/lastnik podjetja
☐ Visok vodstveni uslužbenec
☐ Srednji vodstveni uslužbenec
☐ Drugo

8. Na kakšnem nivoju sodeluje vaš subjekt?

- ☐ Lokalni
☐ Regionalni
☐ Državni
☐ Mednarodni

Del 2: Dinamika in trendi v turizmu

1. Prosimo, določite tri glavne tekmece v vaši regiji s spodnjega seznama:

- Tekmec 1 (vključno s spustnim seznamom: Država – NUTSIII)
- Tekmec 2 (vključno s spustnim seznamom: Država – NUTSIII)
- Tekmec 3 (vključno s spustnim seznamom: Država – NUTSIII)

2. Pomislite na svojo regijo kot turistično destinacijo in jo primerjajte z obdobjem od 2014 do 2016. Izrazite svoje strinjanje s spodnjimi trditvami:

	Sploh se ne strinjam disagree	Ne strinjam se	Niti strinjam niti ne strinjam	Strinjam se	Popolnoma se strinjam	Ne vem/ ne morem oceniti
Moja regija letos več vlaga v turizem						
Turizem letos ustvarja več delovnih mest in privablja več delavcev v mojo regijo						
Povpraševanje po turizmu v moji regiji se letos večja						
Turistična ponudba v moji regiji se letos večja						
Moja regija letos razpršuje turistično ponudbo						
Moja regija letos znižuje cene, da spodbuja prodajo						
Moja regija letos vlaga več truda v trženje, da privabi več turistov						
Moja regija se letos promovira na novih trgih/segmentih						
Moja regija letos razširja svoje distribucijske kanale						

Del 3: Lokalni odzivi na globalne trende v trajnostnem turizmu



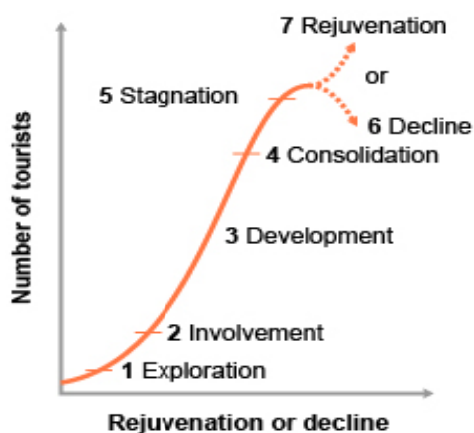
Prosimo, označite, v kakšni meri se strinjate z vsako od spodnjih trditev:

Moja regija ...

	Sploh se ne strinjam	Ne strinjam se	Niti strinjam niti ne strinjam	Strinjam se	Popolnoma se strinjam	Ne vem/ ne morem oceniti
... se pripravlja na vstop novih neposredno konkurenčnih destinacij						
... se pripravlja na možnost teroristične grožnje						
... se trudi vzpostaviti trajnostno okolje (npr. zmanjšuje porabo energije in vode)						
... se trudi vzpostaviti trajnostno družbo (npr. kulturna avtentičnost, vključujoča družba)						
... koristi znanje, ki ga omogočajo masovni podatki (<i>povezava, ki pojasnjuje, kaj so masovni podatki</i>)						
... se poslužuje digitalnih trženjskih kanalov						
... je pripravljena na rastočo zaskrbljenost glede zdravja in dobrobiti						
... se je pripravljena spopasti s podnebnimi spremembami						
... se trudi vzpostaviti trajnostno gospodarstvo						
... se trudi izkoristiti ekonomijo delitve						

Del 4: Življenjski krog destinacije

Preučite spodnji graf in ocenite, v kateri fazi (od 1 do 7) menite, da je vaša NUTS III regija v smislu razvoja turizma: _____



Opomba:

- 1. Raziskovanje**: Malo turistov, neokrnjen kraj in malo turističnih objektov.
- 2. Sodelovanje**: Nekaj turističnih objektov, oblikovanje turistične sezone.
- 3. Razvoj**: Nekaj oglaševanja regije. Regija je prepoznana kot turistična destinacija.



4. **Utrditev:** Število turistov se počasneje večja. Nekateri konflikti med gostitelji in turisti.
5. **Stagnacija:** Turistični objekti so v nevarnosti, da zastarajo. Število turistov lahko upade.
6. **Upad:** Če destinacija ni pomlajena (6. faza), sledi upad. Ljudje izgubijo službe v turizmu. Podoba regije trpi.
7. **Pomladitev:** Investicije in prenova destinacije, da se poveča število turistov.
Vir: Butler (1980)

Del 5: Zunanji učinki turizma

12. Prosimo, označite, v kakšni meri se strinjate z vsako od spodnjih trditev v povezavi s **pozitivnimi učinki** turizma na vašo regijo.

Turizem ...

	Sploh se ne strinjam	Ne strinjam se	Niti strinjam niti ne strinjam	Strinjam se	Popolnoma se strinjam	Ne vem/ ne morem oceniti
... ustvarja delovna mesta za lokalne prebivalce						
... viša raven prihodkov in življenjski standard						
... ustvarja nove trge za naše lokalne izdelke						
... koristi drugim gospodarskim dejavnostim v moji regiji						
... pomaga razvijati boljšo infrastrukturo in javni prevoz						
... pomaga ohranjati naravno okolje in naravno dediščino v moji regiji						
... pomaga ohranjati kulturno dediščino v moji regiji						
... vodi do večjega števila kulturnih in rekreacijskih dogodkov za lokalne prebivalce						
... izboljša kakovost življenja prebivalcev						
... pomaga ohraniti socialno-kulturno avtentičnost in zgodovinsko identiteto moje regije						
... spodbuja kulturno izmenjavo						

13.2. Prosimo, označite, v kakšni meri se strinjate z vsako od spodnjih trditev v povezavi z **negativnimi učinki** turizma na vašo regijo.

Turizem...

	Sploh se ne strinjam	Ne strinjam se	Niti strinjam niti ne strinjam	Strinjam se	Popolnoma se strinjam	Ne vem/ ne morem oceniti
... povečuje cene izdelkov in storitev za prebivalce						
... viša vrednost nepremičnin (cena parcel in stanovanj)						



... povzroči izrivanje drugih gospodarskih dejavnosti						
... ima dolgotrajen negativen učinek na okolje						
... povečuje onesnaženost vode						
... povečuje druge vrste onesnaženja (zrak, hrup, prst)						
... povzroči prekomeren razvoj (prekomerna gradnja)						
... povzroči prenatrpanost prebivalstva						
... povzroči prekomerno rabo naravnih in rekreacijskih virov						
... poveča raven kriminala						
... močno vpliva na rabo tal in izgubo estetike krajinskih vrednot						

Del 6: Trajnosten razvoj turizma

Zasebni sektor (če predstavljate deležnika v zasebnem sektorju)

Vključevanje trajnostnih praks

1. V kakšni meri ste vključili vsako od sledečih trajnostnih praks v delovanje svojega podjetja?

	V veliki meri	Do določene mere	Sploh ne
Iščemo in zaposlujeemo lokalne prebivalce			
Kupujemo izdelke lokalnih pridelovalcev/dobaviteljev			
Vzpostavljamo poslovne veze znotraj turizma in drugih gospodarskih dejavnosti v naši regiji			
Kupujemo od podjetij s certifikati o zelenih praksah			
Zmanjšujemo in gospodarimo z emisijami toplogrednih plinov			
Nadziramo, zmanjšujemo in recikliramo odpadke (npr. kompostiranje odpadkov)			
Zmanjšujemo porabo vode (npr. uporaba sistema z nizko porabo vode)			
Upravljamo z odpadnimi vodami			
Zmanjšujemo hrup			
Delujemo energetske učinkovite (npr. uporaba energetske učinkovite osvetlitve)			
Uporabljamo obnovljive vire energije (npr. sončna, vetrna energija, itn.)			
Uporabljamo zelene izdelke za podjetja (npr. biorazgradljivi materiali, recikliran papir, itn.)			
Omejujemo dostop obiskovalcev do občutljivih naravnih virov			
Omejujemo dostop obiskovalcev do občutljivih kulturnih in zgodovinskih virov			
Ohranjamo kulturno in zgodovinsko identiteto			
Vpeljujemo okoljske izobraževalne programe za obiskovalce			
Urimo in izobražujemo zaposlene o trajnostnih praksah			
Pridobivamo "zelene certifikate"			
Doniramo sredstva ali sorodne usluge zelenim iniciativam			
Vzpostavljamo "zeleno kulturo" na delovnem mestu (npr. spodbujanje			



souporabe avtomobila, vožnja v službo s kolesom)			
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Ovire in izzivi

2. V kakšni meri je vsaka od naštetih ovir vplivala na vašo zmožnost vključiti trajnostne turistične prakse v svoje delovanje?

	V veliki meri	Do določene mere	Sploh ne
Pomanjkanje sredstev za investiranje (npr. oprema, obnove, sistemi, itn.)			
Pomanjkanje programov, ki spodbujajo trajnost (npr. vladne iniciative)			
Pomanjkanje časa za načrtovanje trajnosti zaradi drugih poslovnih prioritet			
Omejen dostop do dobaviteljev, ki prodajajo trajnostne izdelke (npr. biološko pridelana hrana, alternativno gorivo, biorazgradljivi predmeti, itn.)			
Pomanjkanje informacij o tem, kako delovati bolj trajnostno			
Pomanjkanje predanosti za potrebe trajnostnih turističnih praks			
Pomanjkanje primerne zakonodaje			
Stranke smatrajo trajnost kot manj pomembno			
Drugo: _____			

Javni sektor ali organizacije civilne družbe (če predstavljate deležnika iz javnega sektorja ali organizacije civilne družbe)

Razvoj turizma spoštuje načelo trajnosti

1. Prosimo, označite, v kakšni meri se strinjate z vsako od naslednjih trditev o razvoju turizma v svoji regiji:

	Sploh se ne strinjam	Ne strinjam se	Niti strinjam niti ne strinjam	Strinjam se	Popolnoma se strinjam	Ne vem/ ne morem oceniti
Na splošno so učinki razvoja turizma in predlogi zanj problematični						
Vprašanja trajnosti, vključno omejenost sredstev, so upoštevana v turističnih načrtih						
Posamezen razvoj turizma nadzorujejo učinkoviti postopki načrtovanja rabe tal						
Ocena vpliva na okolje/trajnost se učinkovito aplicira na razvoj turizma						
Ekonomski instrumenti se uporabljajo za vplivanje na razvoj trajnostnega turizma						



Obstajajo nasveti, ki so na voljo in posredovani razvijalcem o trajnosti njihovih projektov						
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Turistične dejavnosti ustrezajo standardom trajnosti

2. Prosimo, označite, v kakšni meri se strinjate z vsako od spodnjih trditev o turističnem delovanju v svoji regiji:

	Popolnoma se strinjam	Strinjam se	Niti strinjam niti ne strinjam	Ne strinjam se	Sploh se ne strinjam	Ne vem/ ne morem oceniti
Vzpostavljeni so predpisi o okoljskem učinku turističnih dejavnosti						
Na splošno ponudniki turističnih storitev poskušajo izboljšati trajnost svojega delovanja						
Turistične agencije upoštevajo težave v zvezi s trajnostjo izdelkov, ki jih tržijo, in podatki, ki jih nudijo						
Ekonomski instrumenti se uporabljajo za vplivanje na trajnost ponudnikov turističnih storitev						
Vzpostavljene so sheme za certifikate, ki izpostavljajo podjetja, ki se ravna po trajnostnih standardih						
Podjetja v turizmu imajo možnost krepiti zmogljivosti in dobiti nasvete, kako izboljšati trajnost svojih dejavnosti						
Storjeni so bili potrebni koraki, da se turiste pouči o vprašanjih trajnosti v državi, kar vpliva tudi na njihovo ravnanje						

3. Do kakšne mere je vaša regija vključena v vsako od naštetih trajnostnih praks?

	V veliki meri	Do določene mere	Sploh ne
Omejevanje dostopa obiskovalcev do občutljivih naravnih virov			
Omejevanje dostopa obiskovalcev do občutljivih kulturnih in zgodovinskih virov			
Ohranjanje kulturne in zgodovinske identitete			
Vpeljevanje izobraževalnih programov o okolju za obiskovalce			
Izobraževanje zaposlenih o trajnostnih praksah			
Doniranje sredstev ali sorodnih uslug zelenim iniciativam			
Uporabljanje mnenja prebivalcev kot podpora pri sprejemanju odločitev o razvoju turizma			



Enquête auprès des acteurs du tourisme

Informations aux participants

Cette enquête a pour but d'identifier les dynamiques régionales et les tendances observées dans la zone MED, d'une part et d'autre part, d'évaluer l'impact éventuel des changements mondiaux sur le développement durable du tourisme.

Toute participation est entièrement volontaire et vous ne serez aucunement pénalisé si vous décidez de ne pas prendre part à cette enquête. Toutefois, il s'agit d'une occasion unique de partager votre opinion dans le cadre d'une enquête transnationale qui vise à réunir des informations permettant de promouvoir un tourisme durable. Cette enquête permettra de rassembler des résultats qui pourront être utilisés par tous les acteurs du tourisme, en tant qu'outil d'aide à la prise de décision, permettant ainsi la promotion de changements au niveau des politiques, des pratiques entrepreneuriales et des comportements des consommateurs, allant dans le sens d'un secteur du tourisme plus durable.

L'enquête est disponible jusqu'au 31 juillet 2017 et vous pourrez y participer à n'importe quel moment jusqu'à cette date. Si votre organisation est présente sur plusieurs régions NUTS III, vous recevrez plusieurs questionnaires et nous vous prions de bien vouloir remplir un questionnaire par région NUTS III. Ce questionnaire vous prendra environ 15 minutes à remplir.

Toutes les réponses sont confidentielles. En participant à cette enquête, vous acceptez de prendre part à cette recherche. Les résultats de cette recherche seront divulgués sur le site du projet, disponible sur la plateforme Interreg MED: www.shapetourism.eu. Les résultats de cette recherche pourront également être publiés ou présentés lors de conférences.

D'avance, nous vous remercions.

Section 1: Caractéristiques personnelles et institutionnelles

8. Veuillez indiquer la localisation de votre organisation (si votre organisation est présente sur plusieurs régions NUTS III, nous vous prions de bien vouloir remplir un questionnaire par région NUTS III):

2. Âge: _____

3. Genre:

☐ Homme

☐ Femme

4. Titre:

☐ École primaire

☐ École secondaire

☐ Diplôme d'enseignement supérieur

Domaine: _____



5. Nombre d'années d'expérience dans le secteur du tourisme (emploi ou autre): _____

6. Type d'acteur clé que vous représentez:

- ☐ Secteur public (institutions gouvernementales nationales, régionales ou locales)
- ☐ Secteur privé (tours opérateurs, opérateurs de transports, secteur du logement, agence de voyages, attractions touristiques)
- ☐ Organisations de la société civile (par ex.: organisations non-gouvernementales, fondations et organisations de protection de l'environnement à but non lucratif, organisations de protection des animaux sauvages, des droits de l'Homme et des droits des travailleurs)

7. Votre rôle au sein de votre organisation:

- ☐ Président/CEO/Directeur/Propriétaire
- ☐ Cadre Supérieur
- ☐ Cadre Moyen
- ☐ Autre

8. À quel niveau votre institution opère-t-elle?

- ☐ Local
- ☐ Régional
- ☐ National
- ☐ International

Section 2: Dynamiques et tendances touristiques

1. Veuillez indiquer les trois principaux concurrents dans votre région à partir de la liste ci-dessous :

- Concurrent 1
- Concurrent 2
- Concurrent 3

2. Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes, tout en considérant votre région comme une destination touristique, pour la période allant de 2014 à 2016:

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
Cette année, ma région a investi plus dans le secteur touristique						



Cette année, le secteur touristique a créé plus de postes de travail et permis de recruter plus d'employés						
Cette année, la demande touristique est en hausse dans ma région						
Cette année, l'offre touristique est en hausse dans ma région						
Cette année, ma région a diversifié l'offre touristique						
Cette année, ma région a baissé les prix afin d'augmenter les ventes						
Cette année, ma région a fait un effort de marketing pour attirer plus de touristes						
Cette année, ma région a lancé sa promotion dans de nouveaux marchés/segments						
Cette année, ma région a diversifié ses canaux de distribution						

Section 3: Réactions locales face aux tendances mondiales pour un tourisme durable

Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes:

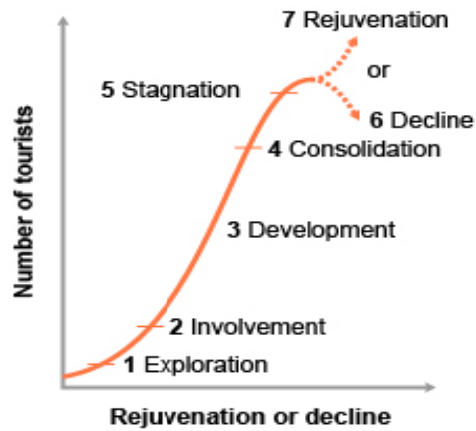
Ma région...

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
...travaille dans le sens de faire face à l'émergence de nouvelles destinations concurrentes						
...développe ses capacités pour faire face à une possible attaque terroriste						
...travaille en vue de promouvoir la durabilité environnementale (par ex.: réduire les consommations d'eau et d'électricité)						
...travaille en vue de promouvoir la durabilité sociale (par ex. : authenticité culturelle, société inclusive)						
...tire profit des connaissances réunies par Big Data						
...a recours aux canaux de marketing numérique						
...est préparée pour répondre aux inquiétudes croissantes dans les domaines de la santé et du bien-être						
...est préparée pour faire face aux changements climatiques						
...travaille en vue de promouvoir la durabilité économique						
...travaille pour tirer profit de l'économie collaborative						

Section 4: Le cycle de vie de la destination

Au vu du schéma ci-dessous, veuillez indiquer quelle phase (de 1 à 7) correspond, selon vous, à la situation de votre région NUTS III en ce qui concerne le développement du tourisme: _____





Légende:

1. **Exploration:** Peu de touristes, lieu préservé et peu d'infrastructures.
 2. **Implication:** Quelques infrastructures destinées aux touristes, période touristique clairement identifiée.
 3. **Développement:** Région objet de quelques publicités. La région devient une destination touristique reconnue.
 4. **Consolidation:** La croissance du nombre de touristes stagne. Certains conflits surgissent entre la population locale et les touristes.
 5. **Stagnation:** Les infrastructures destinées aux touristes se dégradent et sont désuètes. Le nombre de touristes peut être en baisse.
 6. **Déclin:** Si la destination n'est pas renouvelée (phase 6), elle poursuivra vers une phase de déclin. Des postes de travail liés au tourisme sont perdus. L'image de la région est touchée.
 7. **Renouvellement:** Investissement et modernisation de la destination afin d'augmenter le nombre d'attractions touristiques.
- Source: Adapté de Butler (1980).

Section 5: Externalités dans le tourisme

14. Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes, dans le cadre des **impacts positifs** du tourisme dans votre région:

Grâce au tourisme,...

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
...de nouveaux postes de travail sont créés pour la population locale						
...les salaires et les standards de vie augmentent						



...de nouveaux marchés sont créés pour les produits locaux						
...d'autres activités économiques de la région sont avantagées						
...des infrastructures et des réseaux de transports en commun de meilleure qualité se développent						
...l'environnement naturel et le patrimoine naturel de la région sont préservés						
...le patrimoine culturel de la région est préservé						
...le nombre d'événements culturels et d'animation destinés à la population locale augmente						
...la qualité de vie de la population locale s'améliore						
...l'authenticité socio-culturelle et l'identité historique de la région sont préservées						
...des échanges culturels sont encouragés						

2. Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes, dans le cadre des **impacts négatifs** du tourisme dans votre région.

À cause du tourisme,...

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
...les prix des biens et des services pour la population locale augmentent						
...la valeur immobilière augmente (prix des terrains et de l'habitation)						
...d'autres activités économiques sont abandonnées						
...l'environnement subit des effets négatifs à long terme						
...la pollution de l'eau augmente						
...d'autres types de pollution augmentent (air, sonore, sol)						
...la région subit un surdéveloppement (inquiétude liée au domaine de la construction)						
...la région subit un surpeuplement						
...les ressources naturelles et de loisir sont utilisées abusivement						
...la criminalité augmente						
...l'utilisation du sol est soumise à une forte pression et les valeurs esthétiques du paysage se perdent						

Section 6: Durabilité du développement touristique



Secteur privé (if respondent represents a stakeholder from the private sector)

Pratiques durables intégrées dans les entreprises

1. Dans quelle mesure avez-vous intégré les pratiques durables suivantes dans vos activités commerciales?

	Dans une grande mesure	Dans une certaine mesure	Pas du tout
Recruter et embaucher des habitants locaux pour les postes disponibles			
Acheter des produits auprès de fournisseurs locaux			
Créer des liens commerciaux entre le tourisme et d'autres activités économiques dans la région			
Acheter auprès d'entreprises certifiées pour leurs pratiques écologiques			
Réduire et gérer les émissions de gaz à effet de serre			
Gérer, réduire et recycler les déchets solides (par ex. : compostage)			
Réduire la consommation d'eau potable (par ex. : utiliser un système de gestion de l'eau pour une utilisation limitée)			
Gestion des eaux usées			
Réduire les nuisances sonores			
Accroître l'efficacité énergétique (par ex. : utiliser des ampoules basse consommation)			
Recourir aux énergies renouvelables (par ex. : énergie solaire, éolienne, etc.)			
Utiliser des produits écologiques (par ex. : matériaux biodégradables, papier recyclé, etc.)			
Limiter l'accès des touristes aux ressources naturelles sensibles			
Limiter l'accès des touristes aux ressources historiques et culturelles sensibles			
Préserver l'identité historique et culturelle de la région			
Mettre en place des programmes d'éducation environnementale destinés aux touristes			
Former et informer les employés sur les pratiques durables			
Obtenir une « certification écologique »			
Faire don de biens ou de services à des initiatives écologiques			
Établir une « culture écologique » sur le lieu travail (par ex. : encourager le covoiturage, se rendre au travail à vélo)			

Barrières et défis

2. Dans quelle mesure les barrières suivantes ont-elles eu un impact sur votre capacité à adopter des pratiques touristiques durables dans vos activités commerciales ?

	Dans une	Dans une	Pas du



	grande mesure	certaine mesure	tout
Manque d'argent disponible pour investir (par ex. : équipement, rénovations, systèmes, etc.)			
Manque de programmes d'encouragement dans le domaine de l'écologie (par ex. : programmes gouvernementaux)			
Manque de temps pour prévoir des mesures de durabilité en raison d'autres priorités commerciales			
Accès limité aux fournisseurs vendant des produits durables (par ex. : aliments organiques, combustibles alternatifs, objets biodégradables, etc.)			
Manque d'information pour agir de forme plus durable			
Manque d'engagement par rapport à la nécessité de pratiques durables dans le tourisme			
Manque de législation appropriée			
Manque d'intérêt des clients pour la durabilité			
Autre : _____			

Secteur public ou organisations de la société civile (if respondent represents a stakeholder from the public sector or from a civil society organization)

Un développement touristique respectant la durabilité

1. Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes concernant le développement touristique dans votre région:

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
En règle générale, les impacts des aménagements touristiques et de l'offre touristique sont perçus comme un problème						
Les questions de durabilité, comme les restrictions des ressources, sont prises en compte dans les plans de développement touristique						
Les projets privés d'aménagements touristiques sont contrôlés grâce à des procédures efficaces de planification d'utilisation du sol						
L'évaluation des impacts sur l'environnement / la durabilité est appliquée de manière effective aux aménagements						



touristiques						
Des instruments économiques sont utilisés pour influencer la durabilité des aménagements touristiques						
Les promoteurs touristiques sont conseillés sur la durabilité de leurs projets						

Des activités touristiques allant de pair avec les standards de la durabilité

2. Veuillez indiquer votre degré d'accord par rapport aux propositions suivantes concernant les activités touristiques dans votre région:

	Pas du tout d'accord	Plutôt pas d'accord	Ni en accord Ni en désaccord	Plutôt d'accord	Tout à fait d'accord	Je ne sais pas / ne suis pas en mesure de répondre
Des réglementations existent et sont appliquées dans le cadre de l'impact du tourisme sur l'environnement						
En règle générale, les prestataires de services touristiques prennent des mesures visant à améliorer la durabilité de leurs activités						
Les opérateurs touristiques prennent en compte les questions de durabilité pour les produits qu'ils proposent et les informations qu'ils fournissent						
Des instruments économiques sont utilisés pour influencer la durabilité des activités touristiques						
Des systèmes de certification sont mis en place pour identifier les entreprises respectant les standards de durabilité						
Des conseils et des programmes de renforcement des capacités sont mis en place et proposés aux entreprises touristiques afin d'augmenter la durabilité de leurs activités						
Des actions ont été mises en place pour éveiller la conscience des touristes à l'égard des questions de durabilité dans le pays et ainsi influencer leurs actions						

3. Dans quelle mesure votre région a-t-elle intégré les pratiques durables suivantes?

	Dans une grande mesure	Dans une certaine mesure	Pas du tout
Limiter l'accès des touristes aux ressources naturelles sensibles			
Limiter l'accès des touristes aux ressources historiques et culturelles			



sensibles			
Préserver l'identité historique et culturelle de la région			
Mettre en place des programmes d'éducation environnementale destinés aux touristes			
Former et informer les employés sur les pratiques durables			
Faire don de biens ou de services à des initiatives écologiques			
Consulter les habitants afin de soutenir les décisions prises dans le cadre du développement touristique			



ΕΡΩΤΗΜΑΤΟΛΟΓΙΟ ΓΙΑ ΦΟΡΕΙΣ ΣΧΕΤΙΚΟΥΣ ΜΕ ΤΟΝ ΤΟΥΡΙΣΜΟ

Πληροφορίες για τους συμμετέχοντες

Ως κύριος τουριστικός φορέας, σας προσκαλούμε να συμμετέχετε σε μια έρευνα σχετικά με την δυναμική και των τάσεων του τουρισμού στην Μεσόγειο. Η έρευνα αυτή έχει ως στόχο να προσδιορίσει τις περιφερειακές δυναμικές και τάσεις που επηρεάζουν την περιοχή της Μεσογείου, καθώς και να αξιολογήσει τον αντίκτυπο που μπορεί να έχουν οι παγκόσμιες αλλαγές πάνω στη βιώσιμη τουριστική ανάπτυξη.

Η έρευνα θα διαρκέσει περίπου 15 λεπτά για να ολοκληρωθεί. Η έρευνα αυτή αποτελεί σημαντική φάση του προγράμματος «*ShapeTourism - New shape and drives for the tourism sector: supporting decision, integrating plans and ensuring sustainability*», το οποίο είναι ένα πρόγραμμα το οποίο συγχρηματοδοτείται από το Ευρωπαϊκό Ταμείο Περιφερειακής Ανάπτυξης.

Η συμμετοχή σας είναι εντελώς εθελοντική και σε καμιά περίπτωση δεν θα είστε σε μειονεκτική θέση αν επιλέξετε να μην συμμετέχετε. Ωστόσο έχετε μια μοναδική ευκαιρία να δώσετε τη γνώμη σας σε μια διακρατική έρευνα που αποσκοπεί στην παραγωγή πληροφοριών που ενισχύουν την βιωσιμότητα του τουρισμού. Αυτή η έρευνα θα παράγει αποτελέσματα που θα μπορούσαν να χρησιμοποιηθούν από όλους τους φορείς τουρισμού για τη στήριξη λήψης αποφάσεων προκειμένου να αλλάξουν πολιτικές, επιχειρηματικές πρακτικές καθώς και η συμπεριφορά των καταναλωτών προς ένα πιο βιώσιμο τουριστικό τομέα. Η έρευνα θα διαρκέσει μέχρι τις 31 Ιουλίου 2017. Μπορείτε να συμπληρώσετε την έρευνα σε οποιοδήποτε σημείο κατά τη διάρκεια αυτής της περιόδου.

Όλες οι απαντήσεις είναι εμπιστευτικές. Συμμετέχοντας στην έρευνα δίνετε τη συγκατάθεση σας να γίνεται μέρος αυτής της έρευνας. Τα αποτελέσματα της παρούσας έρευνας θα είναι διαθέσιμα στην ιστοσελίδα του έργου, στην πλατφόρμα MED www.interreg-med.eu. Αποτελέσματα της έρευνας αυτής μπορούν επίσης να δημοσιευτούν σε επιστημονικά περιοδικά και δημοσιεύσεις συνεδρίων.

Ενότητα 1: Προσωπικά και οργανωτικά χαρακτηριστικά

Περιοχή στην οποία βρίσκεται ο οργανισμός _____

2. Ηλικία: _____

3. Φύλο:

☐ Άνδρας

☐ Γυναίκα

4. Μορφωτικό επίπεδο:



- ☐ Βασική εκπαίδευση
☐ Λύκειο
☐ Προπτυχιακή, Μεταπτυχιακή ή Διδακτορική εκπαίδευση

[Εάν επιλέξετε την επιλογή προπτυχιακό, μεταπτυχιακό ή διδακτορικό] Περιοχή: _____

5. Αριθμός ετών εμπειρίας σε σχέση με την Τουριστική Βιομηχανία (επαγγελματική απασχόληση ή άλλου είδους): _____

6. Κατηγορία βασικού ενδιαφερόμενου Φορέα που εκπροσωπείτε:

- ☐ Δημόσιος Τομέας (Εθνικά, περιφερειακά ή τοπικά κυβερνητικά τμήματα/φορείς)
☐ Ιδιωτικός Τομέας (Ταξιδιωτικοί πράκτορες, Εταιρείες Μεταφορών, Τομέας φιλοξενίας, ταξιδιωτικοί ατζέντηδες, τουριστικά αξιοθέατα)
☐ Οργανισμοί Κοινωνίας των Πολιτών (π.χ. Μη κυβερνητικές οργανώσεις, Περιβαλλοντικές φιλανθρωπικές οργανώσεις για το περιβάλλον, άγρια πανίδα, ανθρώπινα δικαιώματα και δικαιώματα των εργαζομένων)

7. Ο ρόλος σας στον οργανισμό:

- ☐ Πρόεδρος/Διευθύνων Σύμβουλος/Διευθυντής/ιδιοκτήτης επιχειρήσεων
☐ Ανώτερο Διοικητικό προσωπικό
☐ Μεσαίο διοικητικό προσωπικό/στέλεχος
☐ Άλλο

8. Ποιο είναι το επίπεδο λειτουργίας της οντότητας σας;

- ☐ Τοπικό
☐ Περιφερειακό
☐ Εθνικό
☐ Διεθνές

Ενότητα 2: Δυναμική και Τάσεις του Τουρισμού

1. Προσδιορίστε τους τρεις κύριους ανταγωνιστές σας από τον ακόλουθο κατάλογο:

- Ανταγωνιστής 1 (συμπεριλαμβανομένης μιας αναπτυσσόμενης λίστα: Χώρα - NUTSIII)
- Ανταγωνιστής 2 (including a drop down list: Country – NUTSIII)
- Ανταγωνιστής 3 (including a drop down list: Country – NUTSIII)

2. Έχοντας υπόψη την περιοχή σας ως τουριστικό προορισμό και αντανakλώντας στην περίοδο από το 2014 έως το 2016, εκφράστε το κατά πόσο συμφωνείτε με τις ακόλουθες δηλώσεις:



	Διαφωνώ έντονα	Διαφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Συμφωνώ	Συμφωνώ απόλυτα	Δεν ξέρω/Δεν μπορώ να κρίνω
Η περιοχή μου επενδύει περισσότερο στον τουρισμό αυτή την χρονιά						
Ο τουρισμός δημιουργεί περισσότερες θέσεις εργασίας και προσλαμβάνει περισσότερους εργαζομένους στην περιοχή μου αυτή την χρονιά.						
Η ζήτηση για τουρισμό στην περιοχή μου αυξάνεται φέτος						
Η τουριστική προσφορά στην περιοχή μου αυξάνεται αυτή την χρονιά						
Η περιοχή μου, αυτή τη χρονιά διαφοροποιεί την προσφορά τουρισμού						
Η περιοχή μου φέτος, μειώνει τις τιμές για να ενθαρρύνει τις πωλήσεις						
Η περιοχή μου φέτος, αυξάνει τις προσπάθειες μάρκετινγκ για να προσελκύσει περισσότερους τουρίστες						
Η περιοχή μου φέτος προωθείτε σε νέες αγορές/τομείς						
Η περιοχή μου διαφοροποιείται όσον αφορά τα κανάλια διανομής αυτή τη χρονιά						

Ενότητα 3: Τοπικές αντιδράσεις στις παγκόσμιες τάσεις για την αειφορία του τουρισμού.

Παρακαλώ υποδείξτε πόσο συμφωνείτε με τις ακόλουθες δηλώσεις:

Η περιοχή μου...

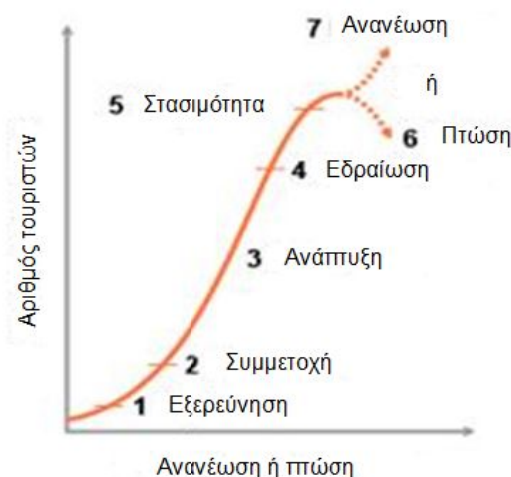
	Διαφωνώ έντονα	Διαφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Συμφωνώ	Συμφωνώ απόλυτα	Δε ξέρω/Δεν μπορώ να κρίνω
...προσπαθεί να αντιμετωπίσει την είσοδο νέων ανταγωνιστικών προορισμών						
....εργάζεται για την αντιμετώπιση μιας πιθανής τρομοκρατικής απειλής						
..... εργάζεται για να διασφαλίσει την περιβαλλοντική βιωσιμότητα (π.χ. μείωση της κατανάλωσης ενέργειας και νερού)						



...εργάζεται για να εξασφαλίσει την κοινωνική βιωσιμότητα (π.χ. πολιτιστική αυθεντικότητα, κοινωνία χωρίς αποκλεισμούς)						
... αξιοποιεί τη γνώση που ενεργοποιείται από τα μεγάλα δεδομένα						
... χρησιμοποιεί τα κανάλια ψηφιακού μάρκετινγκ						
... είναι έτοιμη να ανταποκριθεί στην αυξανόμενη ανησυχία για την υγεία και την ευημερία						
... είναι έτοιμη να αντιμετωπίσει την κλιματική αλλαγή						
...εργάζεται για να εξασφαλίσει οικονομική βιωσιμότητα						
... εργάζεται για να επωφεληθεί από τη συνεργατική οικονομία						

Ενότητα 4: Κύκλος Ζωής Προορισμού

Λαμβάνοντας υπόψη το παρακάτω σχήμα, παρακαλώ όπως αναφέρετε σε ποια φάση (1 έως 7) βλέπετε την περιοχή σας από την άποψη ανάπτυξης τουρισμού:



Σημείωση:

- Εξερεύνηση:** Μικρός αριθμός επισκέψεων τουριστών, παρθένο τοπίο και λίγες εγκαταστάσεις.
- Συμμετοχή:** Μερικές εγκαταστάσεις για τουρίστες, αναγνώριση τουριστικής περιόδου.
- Ανάπτυξη:** Κάποια διαφήμιση στην περιοχή. Η περιοχή αναγνωρίζεται ως τουριστικός προορισμός.
- Εδραίωση:** Η αύξηση του αριθμού των τουριστών είναι ασθενέστερη. Μερικές συγκρούσεις μεταξύ των οικοδεσποτών και των τουριστών.
- Στασιμότητα:** Οι τουριστικές εγκαταστάσεις μπορεί να μειωθούν και να παλιώσουν. Μπορεί να μειωθεί ο αριθμός των τουριστών.
- Πτώση:** Εάν ο προορισμός σας δεν ανανεωθεί/αναζωογονηθεί (στάδιο 6) τότε θα μειωθεί. Οι άνθρωποι χάνουν την θέση εργασίας του σχετικά με τον τουρισμό. Η εικόνα της περιοχής υποφέρει.
- Ανανέωση:** Επενδύσεις και εκσυγχρονισμός στον προορισμό για την αύξηση του αριθμού της τουριστικής έλξης.

Πηγή: Butler (1980)



Ενότητα 5: Επιπτώσεις του τουρισμού

8. Παρακαλείσθε να αναφέρετε πόσο συμφωνείτε με κάθε μια από τις ακόλουθες δηλώσεις σχετικά με τις θετικές επιπτώσεις του τουρισμού στην περιοχή σας.

Ο Τουρισμός...

	Διαφωνώ έντονα	Διαφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Συμφωνώ	Συμφωνώ απόλυτα	Δε ξέρω/Δεν μπορώ να κρίνω
... δημιουργεί θέσεις εργασίας για τους κατοίκους της περιοχής						
...αυξάνει τα επίπεδα εισοδήματος και του βιωτικού επιπέδου						
...δημιουργεί νέες αγορές για τα τοπικά προϊόντα μας						
... ωφελεί άλλες οικονομικές δραστηριότητες στην περιοχή μου						
... βοηθά στην ανάπτυξη καλύτερων υποδομών και δημόσιων μεταφορών						
... συμβάλλει στη διατήρηση του φυσικού περιβάλλοντος και της φυσικής κληρονομιάς της περιοχής μας						
... βοηθά στη διατήρηση της πολιτιστικής κληρονομιάς της περιοχής μας						
...αυξάνει τον αριθμό των πολιτιστικών και ψυχαγωγικών εκδηλώσεων για τους κατοίκους της περιοχής						
...βελτιώνει την ποιότητα ζωής των κατοίκων						
... βοηθά στη διατήρηση της κοινωνικό-πολιτιστικής αυθεντικότητας και της ιστορικής ταυτότητας της περιοχής μας						
... ενθαρρύνει την πολιτιστική ανταλλαγή						

9. Παρακαλείσθε να αναφέρετε πόσο συμφωνείτε με κάθε μία από τις ακόλουθες δηλώσεις σχετικά με τις αρνητικές επιπτώσεις του τουρισμού στην περιοχή σας.

Ο Τουρισμός ...

	Διαφωνώ έντονα	Διαφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Συμφωνώ	Συμφωνώ απόλυτα	Δε ξέρω/Δεν μπορώ να κρίνω



...αυξάνει τις τιμές των αγαθών και των υπηρεσιών για τους κατοίκους						
...αυξάνει τις τιμές των ακινήτων (τιμή γης και στέγασης)						
... προκαλεί τον αποκλεισμό από άλλες οικονομικές δραστηριότητες						
..παράγει μακροπρόθεσμες αρνητικές επιπτώσεις στο περιβάλλον						
... αυξάνει τη ρύπανση των υδάτων						
... αυξάνει άλλους τύπους ρύπανσης (αέρας, θόρυβος, έδαφος)						
... προκαλεί υπερβολική ανάπτυξη (όσον αφορά τις κατασκευές/κτίρια)						
...προκαλεί υπερπληθυσμό						
... προκαλεί την κατάχρηση των φυσικών πόρων						
.... Οδηγεί στην αύξηση της εγκληματικότητας						
.. ασκεί μεγάλη πίεση στη χρήση της γης και οδηγεί στην απώλεια των αισθητικών αξιών του τοπίου						

Ενότητα 6: Βιωσιμότητα και Τουριστική Ανάπτυξη

Ιδιωτικός Τομέας: (Εάν ο ερωτώμενος αντιπροσωπεύει έναν ενδιαφερόμενο φορέα από τον ιδιωτικό τομέα)

Οι πρακτικές βιωσιμότητας που ενσωματώθηκαν

1. Σε ποιο βαθμό έχετε ενσωματώσει στις επιχειρηματικές σας δραστηριότητες καθένα από τις ακόλουθες βιώσιμες πρακτικές;

	Σε μεγάλο βαθμό	Σε κάποιο βαθμό	Καθόλου
Πρόσληψη κατοίκων της περιοχής στις θέσεις εργασίας			
Αγορά προϊόντων από τοπικούς προμηθευτές			
Δημιουργία επιχειρηματικών δεσμών σχετικά με τον τουρισμό και άλλες οικονομικές δραστηριότητες της περιοχής σας			
Purchase from companies with certificates of green practices			
Μείωση και διαχείριση εκπομπών αερίων του θερμοκηπίου			
Διαχείριση, μείωση και ανακύκλωση στερεών αποβλήτων (π.χ. κομποστοποίηση αποβλήτων)			
Μείωση της κατανάλωσης γλυκού νερού (π.χ. Χρήση συστήματος διαχείρισης νερού χαμηλής χρήσης)			
Διαχείριση λυμάτων			
Μείωση του θορύβου			
Να είναι ενεργειακά αποδοτική (π.χ. χρήση φωτισμού χαμηλής κατανάλωσης ενέργειας)			



Χρήση ανανεώσιμων πηγών ενέργειας (π.χ. ηλιακή, αιολική κλπ.)			
Χρήση πράσινων προϊόντων για επιχειρήσεις (π.χ. βιοαποικοδομήσιμα υλικά, ανακυκλωμένο χαρτί κ.λπ.)			
Περιορισμός της πρόσβασης των επισκεπτών σε ευαίσθητους φυσικούς πόρους			
Περιορισμός της πρόσβασης των επισκεπτών σε ευαίσθητους πολιτιστικούς και ιστορικούς πόρους.			
Διατήρηση της πολιτιστικής και ιστορικής ταυτότητας.			
Εφαρμογή προγραμμάτων περιβαλλοντικής εκπαίδευσης για τους επισκέπτες.			
Προσωπική εκπαίδευση και εκπαίδευση των εργαζομένων σε πρακτικές βιωσιμότητας.			
Απόκτηση 'πράσινης πιστοποίησης'			
Δωρεές ή εισφορές σε είδος σε πράσινες πρωτοβουλίες			
Δημιουργία μιας «πράσινης κουλτούρας» στο χώρο εργασίας σας (π.χ. ενθάρρυνση για μία 'πράσινη κουλτούρα' (π.χ.: ενθάρρυνση για να μοιράζονται μαζί οι υπάλληλοι το αυτοκίνητο, να οδηγείτε το ποδήλατο σας σε καθημερινή βάση προς και από το χώρο εργασίας σας).			

Εμπόδια και Προκλήσεις

2. Σε ποιο βαθμό έχουν επηρεάσει τα ακόλουθα εμπόδια την ικανότητα σας να υιοθετήσετε βιώσιμες τουριστικές πρακτικές στις δραστηριότητές σας;

	Σε μεγάλο βαθμό	Σε κάποιο βαθμό	Καθόλου
Έλλειψη διαθέσιμων χρημάτων για επένδυση (π.χ. εξοπλισμός, ανακαινίσεις, συστήματα κ.λπ.)			
Έλλειψη προγραμμάτων παροχής κινήτρων βιωσιμότητας (π.χ. κυβερνητικά κίνητρα)			
Έλλειψη χρόνου για το σχεδιασμό της βιωσιμότητας λόγω άλλων επιχειρηματικών προτεραιοτήτων.			
Περιορισμένη πρόσβαση σε προμηθευτές που πωλούν αειφόρα προϊόντα (π.χ. βιολογικά τρόφιμα, εναλλακτικά καύσιμα, βιοδιασπώμενα είδη κ.λπ.)			
Έλλειψη πληροφοριών σχετικά με το πώς να ακολουθήσετε πιο βιώσιμες πρακτικές			
Έλλειψη δέσμευσης για την ανάγκη βιώσιμων τουριστικών πρακτικών.			
Έλλειψη κατάλληλης νομοθεσίας.			
Χαμηλή σημασία που αποδίδουν οι πελάτες στη βιωσιμότητα			
Άλλο: _____			



Δημόσιος τομέας ή οργανισμός της κοινωνίας των πολιτών (εάν ο ερωτώμενος εκπροσωπεί έναν φορέα από το δημόσιο τομέα ή από οργάνωση της κοινωνίας των πολιτών)

Η Τουριστική ανάπτυξη σέβεται τη βιωσιμότητα

1. Παρακαλούμε όπως αναφέρετε πόσο συμφωνείτε με κάθε μια από τις ακόλουθες δηλώσεις σχετικά με την τουριστική ανάπτυξη στην περιοχή σας;

	Διαφωνών έντονα	Διαφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Συμφωνώ	Συμφωνώ απόλυτα	Δε γνωρίζω/δεν μπορώ να κρίνω
Σε γενικές γραμμές, οι επιπτώσεις των τουριστικών αναπτύξεων και προτάσεων θεωρούνται ως ένα πρόβλημα						
Τα θέματα βιωσιμότητας, συμπεριλαμβανομένων των περιοριστικών παραγόντων σχετικά με τους διαθέσιμους πόρους, λαμβάνονται υπ' όψιν στον τουριστικό σχεδιασμό/τουριστικά σχέδια						
Οι μεμονωμένες τουριστικές αναπτύξεις ελέγχονται από της διαδικασία σχεδιασμού αποτελεσματικής χρήσης της γης Individual tourism developments are						
Η εκτίμηση των επιπτώσεων στο περιβάλλον/ την βιωσιμότητα εφαρμόζεται στις εξελίξεις του τουρισμού αποτελεσματικά						
Τα οικονομικά μέσα χρησιμοποιούνται για να επηρεάσουν τη βιωσιμότητα των τουριστικών εξελίξεων.						
Οι συμβουλές είναι διαθέσιμες και δίνονται στους κατασκευαστές σχετικά με τη βιωσιμότητα των έργων τους						

Οι Τουριστικοί λειτουργοί πληρούν τα πρότυπα βιωσιμότητας.

2. Παρακαλείσθε να αναφέρετε σε ποιο βαθμό συμφωνείτε με κάθε μια από τις ακόλουθες δηλώσεις σχετικά με τις τουριστικές δραστηριότητες στην περιοχή σας:

	Συμφωνώ απολύτως	Συμφωνώ	Ούτε συμφωνώ ούτε διαφωνώ	Διαφωνώ	Διαφωνώ έντονα	Δεν ξέρω/ Δεν μπορώ να κρίνω
Έχουν θεσπιστεί και εφαρμοστεί κανονισμοί σχετικά με τις περιβαλλοντικές επιπτώσεις των τουριστικών επιχειρήσεων.						
Σε γενικές γραμμές, οι πράκτορες τουριστικών υπηρεσιών λαμβάνουν μέτρα για τη βελτίωση της βιωσιμότητας των δραστηριοτήτων τους.						



Οι ταξιδιωτικοί πράκτορες λαμβάνουν υπ' όψιν τα θέματα βιωσιμότητας στα προϊόντα που προωθούν και τις πληροφορίες που παρέχουν.						
Τα οικονομικά μέσα χρησιμοποιούνται για να επηρεάσουν τη βιωσιμότητα των τουριστικών επιχειρήσεων.						
Τα συστήματα πιστοποίησης χρησιμοποιούνται για την διάκριση επιχειρήσεων που συμμορφώνονται με τα πρότυπα βιωσιμότητας.						
Παρέχονται ανάπτυξη ικανοτήτων και συμβουλές και προωθούνται στις τουριστικές επιχειρήσεις για την ενίσχυση της βιωσιμότητας των δραστηριοτήτων τους.						
Γίνονται ενέργειες για ευαισθητοποίηση των τουριστών στα θέματα βιωσιμότητας στη χώρα και για να επηρεάσουν σχετικά τις δραστηριότητές τους.						

3. Σε ποιο βαθμό ενσωμάτωσε η περιοχή σας κάθε μια από τις ακόλουθες βιώσιμες πρακτικές;

	Σε μεγάλο βαθμό	Σε κάποιο βαθμό	Καθόλου
Περιορισμός της πρόσβασης των επισκεπτών σε ευαίσθητους φυσικούς πόρους.			
Περιορισμός της πρόσβασης των επισκεπτών σε ευαίσθητους πολιτιστικούς και ιστορικούς χώρους.			
Διατήρηση της πολιτιστικής και ιστορικής ταυτότητας.			
Εφαρμογή προγραμμάτων περιβαλλοντικής εκπαίδευσης για τους επισκέπτες			
Προσωπική εκπαίδευση και εκπαίδευση των εργαζομένων σε πρακτικές βιωσιμότητας.			
Δωρεές ή εισφορές σε είδος υπηρεσιών για πράσινες πρωτοβουλίες			
Χρησιμοποίηση της γνώμης των κατοίκων για την στήριξη των αποφάσεων σχετικά με την τουριστική ανάπτυξη.			

