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Inspire Policy Making with Territorial Evidence

PRE-EVENT BRIEF

ESPON Peer Learning Workshop: Greening Tourism: Reimagining the Tourism Sector in Ireland

Virtual

20 April 2021

Introduction



Tourism is a leading and ever-growing economic sector outpacing the global economy with a 4% increase each year, according to the UNWTO Tourism Barometer 2019¹. Europe is the destination of choice for 51% of the world market with its rich cultural heritage and favourable socio-political environment.

This trend was dramatically halted in 2020 due to the COVID-19 pandemic², with the whole tourism ecosystem being negatively impacted. The recovery perspective, largely driven by so-called proximity tourism, is expected to dominate summer 2021, with growing demand for open-air and nature-based tourism activities. Indeed, as detailed in the UNWTO Panel of Experts survey, most experts do not see a return to pre-pandemic levels of international tourism happening before 2023³.

In the current pandemic situation, while the impact on tourism and cultural sectors has largely been very adverse, some interesting questions arise out of a potential shift from international to domestic tourism. Before the COVID-19 global pandemic, the 'over tourism' phenomenon in some parts of the world – particularly in some World Heritage Sites – was becoming problematic. The reduction in pollution levels related to the decline in international travel, mobility of tourists and blockage of activities has certainly stemmed the degradation of the built environment and reduced the anthropic impact on the most sensitive sites. Now, as populations and policymakers attempt to simultaneously prop up public health and the economy, the challenge for tourism operators and hospitality providers will be to remain solvent during a crisis that restricts the movement of people.

The role of the tourism sector in a contemporary economy advocates the need for a responsible approach, in line with the UN New Urban Agenda, the 17 Sustainable Development Goals (SDGs), the New European Agenda for Culture (CE, 2018) and the European Green Deal. The basis of tourism is the natural and cultural environment which, in turn, forms the attractive qualities that entice the tourist to experience the place. Maintaining the ecological and socio-cultural functions of these areas is central to the range of initiatives being employed nationally, regionally, and locally to relaunch tourism as a key development driver for diverse regions globally.

A recent report of the Joint Research Centre of the European Commission⁴ provides an analysis of the potential effect of COVID-19 on EU employment as the result of tourism flow slowdown and puts forward a number of policy recommendations for recovery over the short, medium, and long term. Since a strong heterogeneous impact between and within EU countries is expected, the solution is likely to be both local and European, calling for efficient multi-level governance. The other suggestions present in the report are: reshaping of Smart Specialisation Strategies (S3) towards sustainability (S4) may play a key role in the recovery process; opportunities exist in new digital and green solutions and business models; diversifying tourism value chains and making places less tourism dependent can increase resilience; and optimal use of support programmes can speed up short-, medium-, and long-term recovery.

Following this report, the duration of the crisis and its impacts on touristic activities, as well as the presence of accompanying measures will have a considerable impact on the recovery that, as in earlier crises, is expected to take many years. The accompanying policies, spanning different fields and governance levels, to support the tourism sector to increase its resilience in facing future crises of a similar or different nature should focus on: maximising the use of existing policy initiatives (at European and national level); paying attention to the implications of changing consumer preferences for the tourism R&I agenda; increasing resilience through diversification; and considering implications for R&I governance.

1 UNWTO (2019). *UNWTO World Tourism Barometer and Statistical Annex*, 17(2). Available at: <https://www.e-unwto.org/toc/wtobarometereng/17/2> [Access date: 20/08/2020]

2 By regions, Asia and the Pacific, the first region to suffer the impact of the pandemic, saw a 84% decrease in arrivals in 2020. The Middle East and Africa both recorded a 75% drop in arrivals. In Europe arrivals declined by 70% while the Americas saw a drop of 69%. UNWTO (2021). *UNWTO World Tourism Barometer and Statistical Annex*, 19(1). Info available at: <https://www.e-unwto.org/toc/wtobarometereng/19/1> [Access date: 11/03/2021]

3 In fact, while 43% of respondents point to 2023, 41% expect a return to 2019 levels in 2024 or later.

4 Marques Santos, A., Madrid, C., Haegeman, K. and Rainoldi, A., *Behavioural changes in tourism in times of Covid-19*, Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-20401-5, doi:10.2760/00411, JRC121262.

Regarding the *changing consumer preferences for the tourism R&I agenda* in the short term, the recommended actions concern “Innovative approaches to safety and healthy tourism” and “Increasing the role for consumer preferences and of behavioural science in sustainable tourism”. The strategic choice for the medium term is to focus on “Novel forms of alternative and sustainable tourism, near-by tourism, and remote tourism” and to “Match tourism better with the UN SGDs” while the long-term perspective calls for “Increased resilience of tourism in facing possible future pandemics”.

In order to *increase resilience through diversification* in the short term, the reference is to further build on the unique European territorial and cultural diversity; in the medium term, to better connect seemingly disconnected value chains (e.g., digital content, industrial tourism..) while the long-term perspective needs to involve diversifying places highly dependent on tourism and assign a strategic role to Sustainable Smart Specialisation Strategies (S4)⁵.

Regarding the *necessary innovation for the sector*, the short term requires an exploration of how S4 can be implemented using funding synergies, to coordinate communication and training funding options, and to better connect communities of actors at EU, national, regional, and local levels. The strategic approach in the medium term regards building of local capacities to understand and optimise the potential funding and financing sources, and optimising synergies between ERDF (European Regional Development Fund) and EAFRD (The European Agricultural Fund for Rural Development), as well as increasing citizens’ participation in localised solutions for tourism. In the long term all these actions contribute to building an efficient multi-level governance for sustainable tourism.

Since its early activities, ESPON has conducted research focusing on the role of heritage (cultural and natural) and tourism in territorial development (ESPON Thematic project 1.3.3 (2006) *The Role and Spatial Effects of Cultural Heritage and Identity*; 1.3.2(2006) *Territorial trends of the management of the natural heritage*; ESPON 2013 Project: ATTREG (2013) *Attractiveness of European Regions and Cities for Residents and Visitors*) as well as on the tourism sector’s role in contributing to a greener economy (ESPON GREECO - *Territorial Potentials for a Greener Economy* 2014) or in challenging territorial specificities (ESPON BRIDGES - *Balanced Regional Development in areas with Geographic Specificities*) and, more recently, evaluating the potential of Green Infrastructures in providing ecosystem services such as recreational and leisure services (ESPON GRETA *Green infrastructure: Enhancing biodiversity and ecosystem services for territorial development* 2019) providing useful methodological approaches and policy insights for regional policy-makers. Furthermore, two Targeted Analyses carried out tools and policy recommendations to successfully integrate tourism in territorial development strategies. The ESPON HERITAGE project (2019), focusing on Material Cultural Heritage, provides evidence about the economic value of cultural heritage (CH) on specific economic sectors including tourism, adopting a market valuation approach that uses employment, value added, and other economic indicators to estimate this value. ESPON TOURISM - *Carrying capacity methodology for tourism* (on going) aims to help regional and local practitioners, as well as European, in identifying and considering their specific territorial contexts and specificities for measurement of the carrying capacities of tourist destinations across Europe, for better management and planning. In addition, the Applied Research project ESPON HERIWELL - *Cultural Heritage as a Source of Societal Well-being in European Regions* (ongoing) will provide a methodological framework defining the most important societal domains in which the impact of CH can be observed as well as evidence of such impact.

Objective

The current situation of national and regional lockdowns, and the resulting slowdown in tourism activities, related to COVID-19, provides an opportunity to rethink overall development strategies for Ireland with particular reference to the tourism sector which has been a central asset in terms of employment and contribution to national GDP over the last decade. As was the case during the last recession, tourism has a key role in play in Ireland’s national economic recovery.

Both the Irish National Tourism Development Authority (Fáilte Ireland) and the main industry organisation, the Irish Tourism Industry Confederation (ITIC), launched strategies in 2016⁶ and 2018⁷ respectively. In the Fáilte Ireland Strategy for investment 2016-2022, the value of the tourism sector to the Irish economy was estimated at 4% of GNP (equal to €6 billion of contribution to the whole economy), employing 11% of the working

5 McCann, P. and Soete, L. (2020) Place-based innovation for sustainability, Publications Office of the European Union, Luxembourg, 2020

6 National Tourism Development Authority (Fáilte) Tourism Development & Innovation – *A Strategy For Investment 2016-2022* https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/6_Funding/1-FI-Tourism-Investment-Strategy-Final-07-06-16.pdf

7 ITIC (2018) *Tourism An Industry Strategy for Growth to 2025* - <https://www.itic.ie/tourism-industry-strategy-growth-2025/>

population. In the 2018 ITIC strategy, tourism was recorded as Ireland's largest indigenous industry, being twice the size of agriculture and far bigger in employment numbers than the construction industry, the IT industry, or the financial services sector. The strategy highlighted that the sector is built on local assets – and therefore cannot be outsourced or offshored – and its economic benefits are felt both in the cities but also critically throughout rural Ireland (ITIC, 2018).

Both, from different perspectives, referred to the need to include in policies specific processes to improve environmental performance in terms of touristic service provision and, more generally, in terms of territorial enhancement.

“The quality of Ireland’s natural landscape and countryside, combined with our physical heritage, are areas in which the Irish tourism industry and State have a key role to play, through preservation of that which is irreplaceable and the development of that which enhances the visitor’s overall experience. The ongoing development of Ireland’s tourism sector must reflect both the highest standards of environmental as well as economic sustainability” (ITIC, 2018, p.20).

These directions currently seem to be confirmed in the discussions taking place nationally and locally on the need for a strategic rethink, and the recognised need to build a sustainable industry out of this current crisis (Tourism Recovery Taskforce, 2020⁸).

This ESPON Peer Learning Workshop ‘Greening Tourism: Reimagining the Tourism Sector in Ireland as it Survives to Thrive’ will focus on the ongoing Irish debate about building new sustainable tourism strategy. The objective is to show and discuss how ESPON knowledge can both inform and inspire the development of national policy instruments and to consider how national and regional stakeholders can make (better) use of trans-European knowledge and case studies from other countries.

Policymakers, regional stakeholders, and researchers will share their experiences and discuss selected issues related to Ireland’s emerging tourism strategy and the role of planning in enabling sustainable tourism practices and activities.

Some questions that will be discussed during the PLW include:

- How can European cities and regions relaunch and implement sustainable tourism? How can the sector make full use of the geographical diversity economies, green innovation opportunities, and the need to move towards green new deal initiatives?
- How should regions and cities cooperate to ensure cross-border policy coordination in tourism development and marketing, and adopt effective territorial governance models at wider geographic scales?
- How can the sector reinforce sustainable tourism in multiple urban dimensions, with contradictory goals and planning complexities at urban and regional scales?
- Who needs to be involved in the development and rollout of a sustainable tourism strategy for Ireland in post-COVID times?

The ESPON territorial evidence gathered in previous studies will serve as background and will nurture the discussions around these three questions.

The workshop addresses policymakers and key strategic stakeholders responsible for national and regional development strategies in Ireland and in European regions particularly affected by the pandemic in the tourism sector. Invitations are also extended to researchers and stakeholders that were involved in ESPON projects to reflect on how to better make use of, and bridge territorial evidence into, national and regional practice.

8 Tourism Recovery Taskforce (2020), *Tourism Recovery Plan 2020-2023* – see <https://www.gov.ie/en/campaigns/3fcba-tourism-recovery/>

Goal and expected outcomes

“Finding the right balance between an autonomous development of the destinations and the protection of their environment on the one side and the development of a competitive economic activity on the other side may be challenging. More than other economic activity tourism can develop synergies in close interaction with environment and society. That is because the development of tourist destinations is closely linked to their natural environment, cultural distinctiveness, social interaction, security and wellbeing of local populations. These characteristics make tourism the driving force for the conservation and development of the destinations – directly through raising awareness and income support to them, and indirectly by providing an economic justification for the provision of such support by others” (Agenda for a sustainable and competitive European tourism 2007).

In the current COVID-19 pandemic, the tourism sector in Ireland is operating to the mantra of “Survive to Thrive”; this short-term approach was adopted in 2020 and remains in place for 2021. This is about limiting the damage caused by the pandemic and helping businesses to adapt.

While keeping the sector alive is an obvious objective, there is also a recognition that it is important not to waste this challenge which provides an opportunity both to take stock of the situation and to invest in infrastructure to enable a growth in Sustainable Tourism from 2022 onwards. Budget 2021, for example, announced significant investment in greenways across Ireland. In February 2021, Fáilte Ireland announced its main priorities for 2021; with these including grant schemes to provide financial assistance, domestic marketing at national and county level, urban outdoor investment, business and employee supports with a special focus on mental health and a new digital transformation programme⁹.

In addition to building in resilience to future shocks, a strong emphasis of Ireland’s emerging tourism strategy for a post-COVID landscape recognises tourism’s role as custodians of the environment with specific reference to explore options offered by different forms of tourism (i.e. slow tourism, ecotourism) by evaluating the potential of natural areas and the role of the public realm in leisure and recreation. Sustainable tourism is the ambition with an emphasis on growth/value over volume, engaging the community, and lengthening seasonality.

The event aims to deepen the rationale and explore how these policy directions can be implemented.

Structure and Input

The ESPON Peer Learning Workshop (PLW) ‘Greening Tourism: Reimagining the Tourism Sector in Ireland as it Survives to Thrive’ is structured into three parts:

The first part will focus on the territorial evidence provided by ESPON presenting two useful approaches in tourism adaptation. The first, ESPON TOURISM (*Carrying capacity methodology for tourism*), refers to a multi-stakeholder assessment process of the carrying capacity of tourism destinations. The second, ESPON GRETA (*Green infrastructure: Enhancing biodiversity and ecosystem services for territorial development*) explores the potential of Green Infrastructures in constituting the reference for integrated tourism spatial planning to support the ‘design’ of coherent greenways and blue corridors. An Irish case study is presented in this context.

The second part of the PLW will deal with Reimagining the Tourism Sector in Ireland, with presentations covering the emerging Irish strategic vision for tourism development (a road map by Fáilte Ireland as the National Tourism Development Authority), a case study on how a governmental agency can support both national and local stakeholders in master planning key natural assets and delivery of strategic programmes, and a reflection on the role of planning as enabling sustainable tourism through policy and regeneration programmes.

The final session will give the floor to local stakeholders to speak about their efforts on the ground to sustain a sector in survival mode and reflect on the evidence presented. From this, a discussion among speakers about opportunities, challenges, and policy changes required in support of longer-term recovery will be developed.

⁹ <https://www.failteireland.ie/new-%E2%82%AC55million-business-continuity-scheme-for-the-tourism-sector.aspx>

Agenda (Dublin time)

- 9:30** **Opening**
- Welcome word by Michaela Gensheimer
- 9:45** **Session one: ESPON evidence and policy recommendations (15 min each)**
- Moderated by Maria Prezioso ECP-Italy**
- **ESPON TOURISM - Carrying capacity methodology for tourism**, Mr. Bernd Schu, ÖIR GmbH - Austrian Institute for Regional Studies
 - **ESPON GRETA Green infrastructure: Enhancing biodiversity and ecosystem services for territorial development - Irish case study: Dún Laoghaire-Rathdown**, Mrs. Gemma Garcia-Blanco – TECNALIA
 - Q&A
- 10:30** **Short break**
- 10:40** **Session two: Reimagining the Tourism Sector in Ireland as it Survives to Thrive (15 min each)**
- Moderated by Caroline Creamer ECP-Ireland**
- **Sustainable Tourism: Greening Ireland's Tourism Strategy**, Ms. Orla Carroll, Head of Product Development, Fáilte Ireland
 - **Unleashing the Potential of Nature-Based Assets – A Strategic Approach**, Mr. Éanna Rowe, Western Regional Manager, Waterways Ireland
 - **The role of planning as enabling sustainable tourism through public realm**, Mr. Martin Colreavy, Senior Adviser and Head of Urban Policy, Capital Investment and Regeneration, Department of Housing, Local Government and Heritage & Mr. Damien Ginty, Senior Planner, Kerry County Council
 - Q&A
- 11:40** **Reflections of two local stakeholders**
- Moderated by David Kelly ESPON MC – Ireland**
- **The Burren Ecotourism Network: establishing the Burren as a premier internationally recognised sustainable tourism region**, Mr. Jarlath O'Dwyer, CEO Burren Ecotourism Network & Ms. Carol Gleeson, Manager, Burren & Cliffs of Moher UNESCO Global Geopark
 - **Sustainable Travel Ireland: promoting of sustainable and responsible tourism in Ireland**, Mr. Rob Rankin, Managing Director, Sustainable Travel Ireland
 - Representative from the Department of Tourism
- Discussion about opportunities, challenges, and policy changes required in support of longer-term recovery - moderated by **David Kelly ESPON MC – Ireland**
- 12:20** **Conclusions** by **Luuk Boelens ECP Belgium** (tbc)



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Disclaimer

This delivery does not necessarily reflect the opinion of the members of the ESPON 2020 Monitoring Committee.