



UNION EUROPÉENNE
Fonds Européen de
Développement Régional



EN PARTENARIAT AVEC LA RÉGION AUVERGNE-RHÔNE-ALPES

Impact assessment of the European program POIA 2014-2020 Tourism component

Summary of the evaluation report – 15 December 2022

Teritéo
TERRITOIRES EN MOUVEMENT

In partnership with:



1. Impact assessment framework


1.1 Evaluate the impact of promotion actions for Alpine region


Since 2014, the **Sud Provence-Alpes-Côte d'Azur Region** is the managing authority of the POI Alps 2014-2020, a program intended for the entire Alpine Massif and endowed with an ERDF budget of **€34 million** deployed on 3 distinct axes: Axis 1 - Protecting and enhancing Alpine resources for a sustainable development of mountain territories (€22M), Axis 2 - Structuring and consolidating the Alpine wood processing sector for construction (€6M), Axis 3 - Developing the resilience of territories and populations to natural risks (€5M). The scope of the evaluation concerns Axis 1 and more particularly the specific objective n°1 "Increase the discovery of the Massif through the enhancement of natural and cultural heritage" (€17.8M EU budgeted).


The evaluation work was entrusted to Teritéo and Ethicalia and aimed to examine the impact of ERDF funding on the priority fields of intervention defined by the POIA 2014-2020. In addition, five issues were at the heart of the evaluation:


1. **The challenge of methodological quality in impact assessment,**
2. **The challenge of quantifying the results,**
3. **The challenge of integrating the "Massif specificity",**
4. **The understanding of tourism development issues in mountain areas,**
5. **The challenge of preparing the future 2021-2027 generation,** with an evaluation capable of feeding the reflections on the implementation modalities (selection of projects, animation of the interregional dynamics, administrative management of the files, etc.).


METHOD


 **In-depth documentary analysis** (evaluations, POIA 2014-2020, CIMA 2015-2020, Schéma interrégional du Massif des Alpes, Evalscope, RAMO, Stratégie montagne régionale, etc.)

 **Analysis of monitoring and contextual data** (drawing up a balance sheet of achievements, analysis of achievement and result indicators, analysis of attendance data)

 **70 interviews carried out:** Auvergne-Rhône-Alpes Region, Sud Provence-Alpes-Côte d'Azur Region, Commissariat de Massif, EV referents, departments, project leaders

 **10 "project" case studies 2014-2020**


 **Online survey** for tourism professionals

 **Benchmark on specific and prospective issues:** coherence of tourism offers, prevention of conflicts of use, tourism mobility, notoriety, visibility, legibility and transition of tourism

KEY FIGURES

 From 21 EV territories (07-13) to 39 EV (21-27)

 **130 territorial action plans** (IR1-REA, as of 31/12/2021)

 **3 types of targeted intervention:** 1/ Engineering/ EV animation, 2/ Heritage enhancement facilities, 3/ Sports and leisure facilities

 **15.37 million summer tourist nights in 2021** (IR1-RES as of 31/12/2021)

2. Findings

2.1 EQ 1 – Added value of the Espaces Valléens strategic approach

EQ: To what extent has the structuring of a strategy by Espace Valléen facilitated the implementation of action plans on the territories thus contributing to strengthen the summer tourism offer and its coherence at the scale of the massif? Does the Covid crisis need to re-examine the response strategy?

- ✓ **JC 1.1** – Impact of strategic approach on capacity to act
- ✓ **JC 1.2** – Impact of the action on the coherence of the tourism offer
- ✓ **JC 1.3** – Impact of the Covid crisis on the issues to be considered

WHAT TO REMEMBER

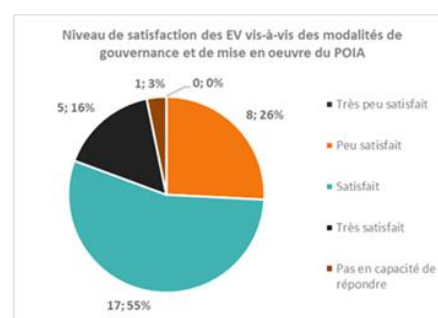
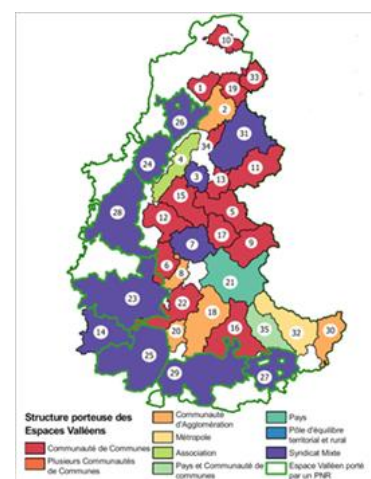
As part of an experimental approach initiated under the policy of Massif, the Espaces Valléens have gradually structured themselves, as a «support» of the organization of territories in favor of tourism strategies over three generations of programs.

This structuring of the Espaces Valléens can be highlighted through the increase in the number of Espaces Valléens from 21 EV territories on the 2007-2013 generation to 35 EV territories on the 2014-2020 generation and on the other hand through the intervention scopes that have been refined in the perspective of the new 21-27 programming (aggregation of 3 new EV territories, merging of scopes, recomposition of an EV), bringing the total of Espaces Valléens to 39.

Beyond this dynamic, the evaluation highlights an overall satisfaction of the EV territories and the project leaders who mobilized the ERDF POIA with regard to the governance and implementation modalities of the POIA 2014-2020, with more than 7 EV respondents out of 10 satisfied or very satisfied and sources of satisfaction mainly related to the accessibility and availability of instructor services, to the quality of the dynamic partnership Commissariat de Massif – Région Sud-Provence-Alpes Côte d'Azur – Auvergne-Rhône-Alpes region or the deployment of significant financial resources and rather clear implementation methods (legibility, fluidity of the procedure, etc.). In addition, the evaluative work highlights

the growing interest of the Espaces Valléens territories for the approach, as evidenced by the retention of applications from the territories for 21-27 in spite of the cessation of ERDF financing dedicated to engineering.

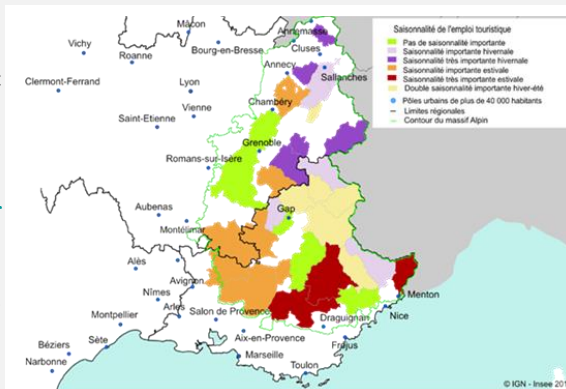
For most territories, the Espaces Valléens approach is presented as an appropriate intervention framework to make the actors of the territory interact and mobilize around the development of a governance and a shared tourism strategy. However, the triggering nature of the approach in favor of the development of a strategy and an action plan is more marked for the territories for which the tourism theme seemed the least structured upstream of its integration into the Espaces Valléens program.



Source: EV interview summary, Teritéo

More specifically, the added value of the EV approach is expressed in a differentiated way according to the territorial stakes at the scale of the Massif.

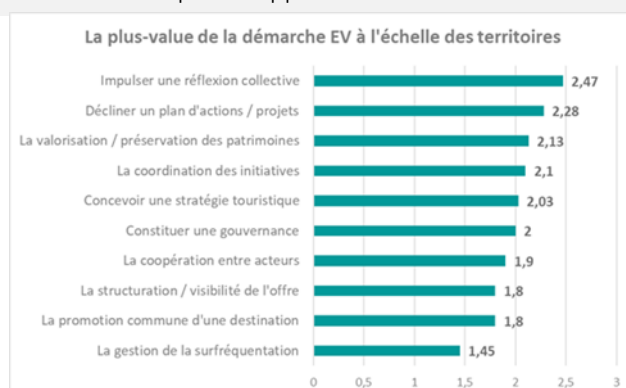
This has made it possible to make up for the delay in structuring a “non-winter” offer and to stimulate a dynamic favourable to the development of more sustainable tourism strategies, particularly for territories most often centred on winter seasonality (e.g. Northern Alps / high altitude). For medium-mountain areas, it would seem that the intervention within the framework of the Espaces Valléens approach has facilitated the tourism transition and amplified the dynamic for territories already engaged for several years in a reflection on adaptation to climate change, due in particular to the fall in the snow cover of the mountains. Finally, other territories show an already significant



Source: INSEE, DADS, ACOSS 2012

summer seasonality, thanks to their proximity to urban centres (Nice, Grenoble, Chambéry, Gap) and their geographical location (valleys, plains). This singularity provokes different reflections around the spread of the tourist season by the development of activities on the wings of the season and the back-season and by the adaptation of the summer offer to the challenges of managing tourist flows, accessibility or prevention of conflicts between inhabitants and visitors.

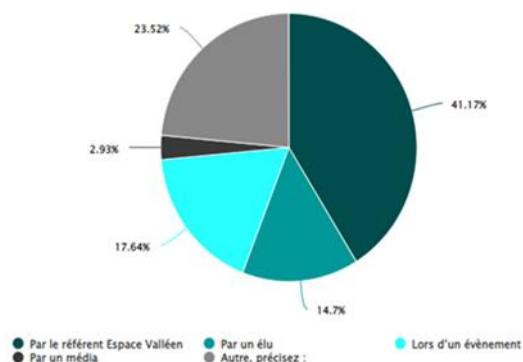
Overall, the Espaces Valléens approach has fostered the ability of territorial stakeholders to act in favor of tourism development. First of all, it contributed to the mobilization of local actors, the structuring of a tourism strategy, the implementation of an action plan (130 territorial action plans supported – Cf. realized value IR1-REA at 31/12/2021) for each of the territories, but also to the animation of tourism stakeholders to make projects emerge, a strong contribution highlighted by EV referents who identify in their vast majority (97%) the capacity of the approach to structure a network and drive a partnership dynamic as the main success of the program, but also through the results of the online «tourism professionals» survey.



Source: Analysis of tourism actor survey, Teritéo

In addition, the structuring of tourism strategies at the scale of each project territory has fostered the EPCI's “tourism” competence, under the NOTRe law, offering concrete prospects for tourism development in the territories concerned.

The mobilization of support for engineering, and in particular the co-financing of the positions of EV mission managers (69 files, 40% of the files programmed), has promoted the impact of the strategic approach on the ability to act. In fact, ERDF POIA support therefore indirectly contributes to the implementation of 100% of the projects supported by the Espaces Valléens (POIA and outside POIA), the EV referent being the “gateway” of support to the implementation of projects. The beneficiary interviews, but also the online «tourism professionals» survey attest to the role «pivotal» of the EV referents. **Nearly 1/3 of the respondents to the survey indicate that they were aware of the Espaces Valléens approach through an EV project manager in their territory.**



Source: Analysis of tourism actor survey, Teritéo



Source: Mise en tourisme Col de l'Iseran, website APTV

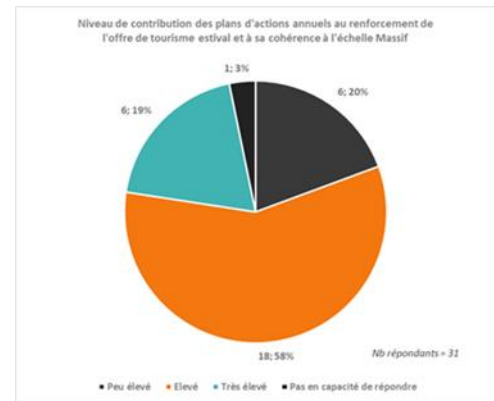
At the same time, the added value of the POIA resided in the ability to mobilize substantial financial resources, which led to the realization of several structuring operations for the Alpine Massif (Tour des Ecrins, Col de l'Iseran, summit of Mont-Ventoux, Point Sublime / Samson Corridor, Espace Montagne et Olympisme, development and maintenance of mountain bike trails in Embrunais Savinois, etc.).

Moreover, the structuring of a strategy contributed over the 2014-2014 generation to 1/ make more solid and in fine consolidate the intervention of certain territories of the massif in favor of their tourism development and 2/ secure the financing plans and reassure the other financial partners of the policy of Massif following the mobilization of ERDF POIA credits in co-financing a tourism development project.

The development of Espaces Valléens strategies has contributed to tourism diversification and the strengthening of summer tourism, a rather well understood orientation identified by the territories and which can be highlighted through the analysis of the action plans of the Espaces Valléens and the programmed projects (17 distinct types of actions, 9 themes covered).

This approach on tourism diversification aims primarily to strengthen summer tourism, which is confirmed by exchanges with the Espaces Valléens territories. In a very concrete way, the POIA support has contributed to the realization of improvements qualifying the tourist offer and structuring a summer tourism offer, even seasonally adjusted. As a result, territories are gradually shifting towards «snow-free» tourism strategies aimed at promoting new ways of discovering the mountains and valleys. As part of the online survey, nearly 2/3 of respondents consider that the EV approach has accelerated the dynamics of off-season tourism.

The approach has also made it possible to strengthen the tourism coherence at the level of each territory (77% of EV respondents report a high level of contribution – even very high to the strengthening of the summer tourism offer and its coherence) and participated in the initiation of a coherence of the global tourist offer on the scale of the Alpine Massif. As such, the Espaces Valléens network is a direct contributor, relying on a network of project managers, thematic working groups, a forum-type platform or on the organization of meetings and seminars at least twice a year. However, the impact of the approach on the external coherence of the offer at the Massif scale remains relatively limited. To meet this challenge, the emergence of inter-Espaces Valléens projects appears as a priority expectation in the perspective of the 2021-2027 generation.



Source: EV interview summary, Teritéo

Finally, a variety of issues and needs have emerged for the future of the Espaces Valléens (new tourist flows, adaptation to climate change, new modes of work and housing, etc.), mostly exacerbated by the health crisis.

The acceleration of the evolutionary trends observed on the massifs (global warming, new clientele / attendance, workcation, etc.) would militate for a close monitoring and anticipation of their consequences, through the choices of co-financed projects, be rolled out over the period 2021-2027 and that opportunities for program review be provided so that the responses can be adapted to the program.

2.2 EQ 2: Effectiveness and impact of actions

EQ: What are the direct and indirect impacts of the actions supported by the POIA on the territories in terms of...?

- ✓ JC 2.1 Promotion of natural and cultural heritage and local know-how
- ✓ JC 2.2 Structuring a network of actors in a dynamic of interregional cooperation
- ✓ JC 2.3 Diversification of supply and development of summer tourism
- ✓ JC 2.4 Diversification of supply and development of seasonally adjusted tourism
- ✓ JC 2.5 Marketing and accessibility of the offer (financial, physical and digital)
- ✓ JC 2.6 Structuring, qualification and visibility of tourism offer and territory/destination

WHAT TO REMEMBER

Over 2014-2020, programming under the ERDF POIA has mainly focused its support effort to the territories Valléens Spaces on 3 types of interventions:

1. Participation in the management of engineering and animation positions in Espaces Valléens (69 projects, €4.1 million from ERDF) which contributes directly to the structuring and organization of the actors of the territorial tourism ecosystem and indirectly to the structuring of a network and a dynamic of cooperation.

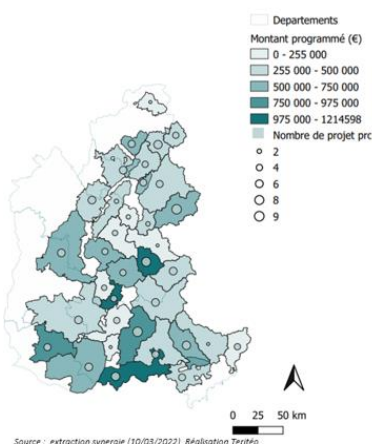


Source: Friends of Abbaye de Boscodon Association

2. Heritage Development (rehabilitation and/or tourism development of natural sites/landscapes and historical/heritage sites, development of a heritage discovery offer through a walking activity, creation or development of spaces dedicated to the discovery of heritage) which contribute directly to the enhancement and preservation of natural and cultural heritage and indirectly to the development of summer and seasonally adjustment tourism.

3. Sports and leisure facilities (development of recreational sites, structuring of promotion strategies, creation of promotion sites, creation and enhancement of sports hiking trails, development of homeless people) which contribute directly to the enrichment of the summer and seasonally adjusted tourism offer and indirectly to the development of summer and seasonally adjusted tourism.

Nombre de projets et montants UE programmés par Espaces Valléens



Source : extraction synergie (10/03/2022), Réalisation Teritéo

Four categories of Espaces Valléens are distinguished in terms of the mobilization of ERDF POIA funds:

- A minority of Espaces Valléens having programmed 1 or 2 projects (animation) for less than €100 K,
- A majority of Espaces Valléens having programmed 3 to 6 projects for €150 K- €500 K EU,
- A dozen Espaces Valléens having programmed more than €500 K and more than 5 projects,
- 3 very dynamic Espaces Valléens, having programmed more than € 1M and between 4 and 8 projects.

Triangulation of sources confirms that **the expected or observed results and effects are high on the enhancement of natural and cultural heritage (CJ 2.1), the structuring of actors (CJ 2.2), the development of summer tourism (CJ 2.3), seasonal adjustment (CJ 2.4) and the structuring, qualification and visibility of the tourism offer (CJ 2.6)**. Conversely, tourism stakeholders consider that the Espaces Valléens approach has had little to no impact on **the marketing and accessibility of the offer (CJ 2.5)**. All the actors agree that the contribution in terms of **valorisation of local know-how (CJ 2.1)** is low.

Types d'effets et impacts	Espaces Valléens	Porteurs	Acteurs du tourisme
Valorisation et préservation des patrimoines naturels et culturels	3,44 / 4	3,48 / 4	2,05 / 3
Développement du tourisme estival	3,33 / 4	2,87 / 4	1,9 / 3
Structuration d'un réseau / dynamique de coopération	3,20 / 4	2,84 / 4	1,91 / 3
Structuration et organisation des acteurs de l'écosystème touristique / territorial	3,17 / 4	2,82 / 4	1,82 / 3
Développement du tourisme désaisonnalisé	3,13 / 4	3,02 / 4	1,9 / 3
Structuration et visibilité de l'offre touristique	3,11 / 4	3,08 / 4	1,71 / 3
Développement d'une offre de découverte itinérante, sportive, de loisirs	3,09 / 4	2,71 / 4	1,55 / 3
Valorisation des savoir-faire locaux	2,51 / 4	2,56 / 4	1,43 / 3

If the intensity of the contribution observed or expected from the projects supported by the POIA 2014-2020 is high for most of the results and effects sought by the program, it is **difficult to precisely isolate its contribution to the evolution of the overall situation on a massive scale**.

In this respect, the survey of tourism stakeholders provides interesting information. Overall, the tourism stakeholders interviewed establish **a strong link between the actions carried out within the framework of the Espaces Valléens and the POIA approach and the dynamics of seasonal adjustment, but rather weak regarding the expansion of clientele and especially increased attendance**.

Indeed, **the weight of the intervention supported by the POIA, even extended to the « Espaces Valléens » scale (excluding the ERDF), must be relativized to the scale of the massif**. The €45 million, of which €18 million in ERDF funding, invested between 2014 and 2022 represents €1.3 million per Espace Valléen (€0.2 million/year) and approximately €40 K per municipality concerned (1137 in total), **which weighs little against external, cyclical (COVID) or trend factors** (telework, workation, search for freshness/global warming, etc.) which **have a very strong influence on the population dynamics of the massifs**.

The intervention supported within the framework of the POIA presents, through support for strategic thinking and territorial animation (engineering) and the contribution to the financing of projects contributing to the enrichment of the summer/off-season tourism offer (development of sites, trails, places, etc.), **more direct impacts on seasonal adjustment and the dynamics of cooperation**, primarily at the local level. For the reasons mentioned above (limited and indirect nature of the interventions, low weight in the face of cyclical dynamics and global trends, etc.) **the capacity of the POIA and the Espaces Valléens approaches to influence the summer attendance dynamics of the massif should be put into perspective**.

In this respect, **the cross-analysis of the available data on the evolution of summer attendance in the massif leads to relativize the reality of the (timid) renewed attractiveness observed in recent years**.

Indeed, **in a long-term vision, the number of visitors to the mountains remains on a downward trend.** As evidenced by the situation observed on its territory by the agency Savoie Mont-Blanc, the highest level of attendance has been recorded in the last 20 years, in 2003, hot summer, with 25.5 million overnight stays. A loss of 13% of overnight stays was recorded between summer 1999 and summer 2014. **From 2015 to 2019, a recovery was initiated (+6% of overnight volume between 2014 and 2019) before the last two summers impacted, at different intensity levels, by COVID: 2020 (strong), 2021 (weak).**

According to the ANMSM, mountain resorts nevertheless benefit from a higher number of visitors in 2020 and 2021 to 2019, especially small and medium-sized mountain resorts that appeal more than large altitude resorts. A study carried out by INSEE in Provence-alpes-Côte d'Azur on the evolution of summer 2021 nights confirms this observation and states that it is the **rural and mid-mountain areas that have greatly benefited from the explosion of stays in France** (94% in 2020) **and the priority given to local destinations** (54% of those leaving). According to Jean-Luc Boch, President of the ANMSM, «For two years, the number of visitors to our territories has been steadily increasing thanks to the efforts made by the resorts to be more attractive and to offer activities that appeal to all audiences».




Finally, as evidenced by the peaks of 2003 and 2019, **the impact of global warming on the attractiveness of the mountain through the search for summer freshness is an element to be considered as a priority in the prospective approaches.**

To conclude, the dynamics made possible by the support for engineering and projects to strengthen the summer/all season tourism offer that results from the action initiated by the Espaces Valléens initiative **help to promote the attractiveness of the territories of the massif for tourists.**

One of the challenges of the massif policy will therefore be to know how to anticipate and act accordingly, in the face of the opportunities and threats that bring a context in strong evolution and respond to changing needs and emerging issues whose magnitude is difficult to anticipate precisely.

3. Recommendations

At the end of the evaluation, **7 recommendations** were defined by the evaluation team. **Five are closely correlated with the benchmark work** (R1 to R5) **and two with the implementation and animation of the Espaces Valléens approach.**

N°	Title
R1	<p>Deploy tools for harmonized quantitative and qualitative monitoring of attendance at the Alpine Massif ( Final report, page 68):</p> <ul style="list-style-type: none"> - Select the most suitable tool to carry out a quantified and qualified monitoring of traffic trends in terms of reliability and cost constraints, - Provide for the compilation of attendance data produced within an observatory (e.g., Stationscope) to be able to follow the evolution of attendance over time, - Support studies and analyses aimed at reporting behavioral changes, practices and the expectations/needs of visitors and the local population.
R2	<p>Anticipate the emergence of land use conflicts in the selection of projects and support preventive actions ( Final report, pages 69-70):</p> <ul style="list-style-type: none"> - Provide for the association of inhabitants in the context of consultation meetings, - Support the development and deployment of management plans in the most sensitive natural sites of the Alpine Massif, - Implement communication/promotion campaigns aimed at changing the behavior of users and especially tourists in natural environments, - Implement monitoring actions to prevent and limit practices that are “at risk” or likely to cause harm to biodiversity, inhabitants and local economic actors - Recruit and mobilize eco-guards to set up mediation/ information actions on the ground and sensitize users in the massifs.
R3	<p>Put in place a process to make the most of the environmental efforts made by the Espaces Valléens stakeholders ( Final report, pages 71-72):</p> <ul style="list-style-type: none"> - Initiate a process of recognition and exploitation of good practices within EVs - Value sincerely and concretely committed territories, - Put to the discussion the possibility of creating an environmental recognition for EV (identification of brands/labels/certification engaging and monitored/controlled, selection of the approaches best suited to the challenges of tourism transition in the mountains), - Consider an experiment around an EV resilient to climate change: global transition approach, working group to support the pilot territory(s).

R4	<p>Reinforce the culture of tourism positioning at different geographical scales in relation to the characteristics of the Espaces Valléens (📖 Final report, page 73):</p> <ul style="list-style-type: none"> - Invite the Espaces Valléens to work on their tourism positioning (knowledge of their offer, identification of the specificities / potential of the territory, target clientele, etc.), - Encourage positions that consider the challenges of the tourism transition and the relevant geographical scale, regardless of administrative boundaries, - Make positioning a tool for mobilizing and animating stakeholders in the territory, - Organize a thematic “positioning” working group within the Espaces Valléens network.
R5	<p>Regulating motorized access to protected natural sites through the development of seasonal alternative collective offers (📖 Final report, page 74):</p> <ul style="list-style-type: none"> - Put in place plans to regulate the flow of motor vehicles to the most frequented tourist sites and/or presenting protection issues in consultation with the representatives of tourism activities present on the sites (accommodation providers, restaurateurs, etc.), - Experience a «car-free» route within a Espaces Valléens: retrace the stages of the tourist’s route from his point of entry within the territory to his place of accommodation and the tourist sites of destination, deploy mobility solutions complementary to the existing offer following collective reflection.
R6	<p>Renew the animation and thematic work dynamics of the Espaces Valléens network (📖 Final report, page 75):</p> <ul style="list-style-type: none"> - Continue to organize an annual two-day seminar, - Consider setting up separate working groups between EVs considered “at the forefront” and “new entrants” EVs, - Consider whether to set up flexible groups on specific themes, - Consider mobilizing an “expertise” / “animation” budget according to the needs for thematic and/or technical lighting at the Espaces Valléens.
R7	<p>Implement actions to improve the support practices of project promoters and facilitate the advent of inter-Espaces-Valléens projects (📖 Final report, page 76):</p> <ul style="list-style-type: none"> - Provide holders with the list of supporting documents as soon as they are instructed, - Anticipate collection protocols related to program indicators (awareness raising, leader’s guide, provision of an operational indicator guide for instructors), - Maintain and strengthen the quality of support and monitoring through training-actions for project leaders on issues at stake (e.g., public commission compliance), - Promote the sharing of experience between project promoters (meetings, dissemination of projects, participation in EV meetings, etc.), - Ensure the implementation of eco-conditionality criteria for development projects, - Support EV territories in the development of an environmental monitoring system, - Provide EV with details on the technical and legal modalities for inter-EV projects.