NALAS

Network of Associations
of Local Authorities
of South East Europe

Green Destinations
of South East Europe (GDSEE)

TOOLKIT
for Local Governments

Toolkit for management of sustainable destinations of South East Europe

Content

A

Introduction

The Green Destinations of South East Europe Toolkit (GDSEE) is produced by NALAS as step that follows the development of the **Sustainable Tourism Planning Toolkit for the Local Governments of South East Europe – STPT,** which was designed as guide for management of sustainable destinations in the region of South East Europe. The aim of GDSEE is to use STPS and upgrade it with existing, recognized and tested similar toolkits on global level. This upgrade will enable the local authorities of South East Europe to use the toolkit for development and management of sustainable tourism destinations.

GDSEE will also enable the local authorities to build common understanding about sustainable tourism development on local level; it will also encourage sustainable tourism planning and development and creation of common reference point for municipalities and local government associations.

With the introduction of GDSEE, NALAS is presenting a new, contemporary and advanced approach in management of sustainable tourism. This goal is achieved by integration of indicator systems such as ETIS (European Tourism indicators System) and GSTR (Global sustainable tourism review). The reason for such approach lays in the ambition for development of toolkit that would be recognized and approved as relevant system of sustainable management on global level.

GDSEE ensures that local authorities get clear picture about their sustainability, the problems that need to be addressed and the respective goals to be achieved. They will be able to develop an action plan for long-term improvements and will gain tools for monitoring of achievements. In this context, GDSEE shall bring important input for destination management.

GDSEE is intended to be a voluntary tool that assists the municipalities to assess and organise the tourism potential on local level and its integration in the official local government planning. It supports the interrelated approaches of "community-oriented tourism planning" and "sustainable tourism", meaning that tourism decisions should pursue at least four basic planning goals, related to **satisfied visitors, profitable tourism Industry, engaged community** and **protected environment**.

GDSEE is organized in steps that local authorities need to follow on the path of reaching those goals: **Awareness raising and gaining support, Stakeholders management, Data collection and keeping records, Data Evaluation, Use of indicators, Strategic Planning, Implementation, Marketing and Positioning.**

Thus, it shall ensure the following:

↘ Encourage local governments **to implement systematic strategic planning and development of sustainable tourism.**

↘ Involve representatives from local communities and promote the consultation and participation of stakeholders **to identify priority issues and related sustainability indicators, by use of smart governance tools** to help tackle the conflicting objectives, gain commitment for effective implementation of decisions, and ensure effective communication about decisions and risks associated with tourism development options.

↘ Application of **sustainable tourism performance management and measurement system**, which is strategically oriented, selected and managed according to the priority issues identified in the destination.

⬊ Adoption of realistic system of *sustainability objectives, indicators and measurements* in all development plans which are directly and indirectly associated with tourism and carried out by the local government, including the land use and development of infrastructure.

Also, it can be used to tackle specific issues associated with the development and management of tourism, including data collection, as well as development of comprehensive tourism strategy to assist the planning and funding of key projects. Furthermore, it can be used as an efficient tool to develop and implement successful marketing strategy and global positioning.

A.1 Sustainable tourism and local governments

Tourism is a relevant economic option, which requires careful planning in order to ensure successful, and continuous positive impact in the course of time. According to UNWTO *World Tourism Barometer*, International tourist arrivals are expected to continue the growth in order to reach 1.8 billion by 2030. Thus, it is expected that the next 20 years will offer immense possibilities to SEE's economies. In particular, opportunities for local development which does not only support creation of jobs in the accommodation sector and related tourism services, but induce the local market for goods and services in sectors as diverse as transport, retailing, construction, culture, food processing, fishing and agriculture. Indeed, tourism is a resource-based industry, unlike the other sectors.

Local governments play decisive role in many forms of tourism, given that they usually include management of many key elements of the tourism product, such as amenities and attractions, transportation, public services and infrastructure and can further influence the behaviour, for better or worse, of private operators.

Local governments are responsible for the planning and management of cultural and natural resources, provision of core utilities and infrastructure on which the tourism industry is based, such as district and city roads, lighting, water-supply and sewerage, public transportation systems, signs, airports and ports. Also, they often operate attractions such as museums, art galleries, sports stadiums, convention centres, parks, events, tours, and other amenities.

As providers of social services, builders of economic infrastructure, regulators of economic activities and often managers of the cultural and natural environment, local governments dispose of many direct instruments to influence the course of local tourism development.

In general, it includes a relevant investment of public money, which means that the local government is perhaps the largest "tourism operator" in many countries. On the demand side, local governments also enable the regional marketing and provide information for visitors in order to ensure quality experience for visitors.

Decisions about tourism development are made on the lowest level of governance where it is appropriate to make decisions centrally, and the local stakeholders affected by tourism are to be consulted and encouraged to participate.

This in turn requires local administrators to be fully equipped with competences and skills to formulate, implement and evaluate sustainable tourism planning. The local community should also be fully engaged in the formulation of tourism policies and plans, through a process of wide consultation and participation, including the provision of skills and knowledge that people need for effective participation in the decision making on local level.

With regard to sustainable tourism, local governments should in particular:

↘ *Implement systematic strategic planning and development of sustainable tourism, which would include:*

    ↪ The control of volume, nature and location of tourism development in order to prevent undue pressure on local resources and biodiversity

↪ The protection of natural and cultural heritage by sound planning controls and sufficient management capacity

↪ The promotion of destination management partnership bodies, bringing together the public sector, private sector and civil society, including organizations that represent the environmental, cultural and local interests of the community.

↘ *Involve representatives of local communities and promote the consultation and participation of stakeholders to identify priority issues and related sustainability indicators, by use of smart governance tools to help tackle the conflicting objectives, gain commitment for effective implementation of decisions, and ensure effective communication about decisions and risks associated with tourism development options.*

↘ *Apply a sustainable tourism performance management and measurement system, which is strategically oriented, selected and managed according to the priority issues identified in the destination.*

↘ *Adopt a realistic system of sustainability objectives, indicators and measurements in all development plans which are directly and indirectly associated with tourism and carried out by the local government, including the land use and development of infrastructure.*

↘ *Deliver capacity building activity, dissemination of good practices and establishment of stakeholder networks, including inter-municipal cooperation, twinning and exchange of best practices within the SEE and with European partners to tackle the challenges of tourism sustainability.*

SUSTAINABLE TOURISM DEVELOPMENT IS A PATH TO HAPPY CONSUMER, SUCCESSFUL LOCAL COMMUNITY AND HEALTHY ENVIRONMENT

Tourism has the potential to create positive effects on the environment and contributes to the protection and preservation of nature. Tourism can serve as tool for awareness raising about environmental values and at the same time it brings positive effects for protected areas and increases their economic value.

Tourism also affects both the environment and the local community. The sustainable management of tourism empowers the destination, the community and the local government to reduce the negative impacts and brings positive values for all stakeholders, as well as economic benefits and protection of resources.

The *sustainable tourism* approach is concerned with tourism being the most appropriate form of development regarding the economic, social and physical resources of a region, in a manner that conserves the social and physical environment and promotes the long-term goals of the community. However, tourism must be considered within the context of sustainable local development rather than just sustainable tourism, so that it can play its role in high-road strategies, especially with reference to access, amenity and services.

From this aspect, sustainable planning should be the key concept in any tourism destination planning. It provides tourism which is in line with the development of healthy community and offers unique and interesting experience to the consumer.

In order to develop sustainable tourism, the destination needs to develop and adopt sustainable management plan.

Sustainable destination management means management of sustainable tourism development in a destination that meets both the needs of tourists and destinations, and protects and enhances the opportunities for future development. **It means management** of all resources in a way that meets economic, social and cultural requirements, while maintaining cultural integrity, nature protection and biodiversity. It **is a widely accepted concept** of development and a key objective in the destination.

A.2 Background of Green Destinations of South East Europe (GDSEE)

GDSEE is a practical guidebook for destination management offices and local authorities on the path towards sustainable tourism development. With the introduction of additional solutions from similar toolkits, GDSEE will serve not only as support for local authorities regarding the planning, but will also give the benchmarking opportunities and will aid the positioning of the destination on local, regional, European and global markets.

The toolkit is based on three already established toolkits:

1. **Sustainable Tourism Planning Toolkit for the Local Governments of South East Europe – STPT "See Tourism Goes Local"**

2. **European Tourism Indicator System for Sustainable Management at Destination Level - ETIS**

3. **Global Sustainable Tourism Review - GSTR**

INDICATORS OF SUSTAINABLE DEVELOPMENT FOR TOURISM DESTINATIONS - UNWTO

The model of sustainable tourism development indicators was developed by the World Tourism Organization (UNWTO) - "Indicators of sustainable tourism development," in 1993 with aim to develop indicators of sustainable tourism development in destinations. It introduced a list of indicators that are suitable for measurement of sustainable tourism development and the prepared recommendations for their application to specific tourist destinations.

In order to measure the sustainable tourism development, a system of twelve basic indicators and some additional indicators were introduced in 2004. The development of indicators took into account all three aspects of sustainable tourism development: economic, socio-cultural and environmental aspects.

GLOBAL SUSTAINABLE TOURISM CRITERIA (GSTC)

GSTC criteria resulted from the attempt to develop a sustainable tourism system on global level. They emerged as result of decades of work and from the worldwide experiences, whereby a number of guidelines, principles and standards for sustainable tourism were taken from all continents. The goal was to establish global consensus on sustainable tourism.

GSTC criteria are managed by the Global Sustainable Tourism Council.

They focus on social and environmental aspects of responsibility, thus taking into account both the positive and negative economic and cultural effects. They cover the four pillars of sustainable tourism and are divided into four areas:

A. Effective management of sustainable development (= Sustainable management);

B. Socio-economic impacts (= socioeconomic Impacts);

C. Cultural influences (= Cultural impact);

D. Environmental impacts (= Environmental Impacts).

Businesses and destinations are expected to fulfill at least one of the presented criteria. Criteria are designed to be easily tailored to the local specificities and it is also possible to develop additional criteria for a specific location or activity.

There are two sets of developed GSTC criteria:

A. GSTC Criteria for hotels and tour operators (GSTC Criteria for Hotels and Tour Operators); March 2012, the GSTC published another version of these criteria (after about three years of examination and testing of the first version), December 2013, draft 2.0 version.

B. GSTC Criteria for Destinations (GSTC Criteria for Destinations (GSTC CD); these criteria and associated indicators have been developed on the basis of recognized criteria and approaches.   In general, they include the UNWTO destination indicators, GSTC criteria for hotels and tour operators and around 40 widely established principles and guidelines, certification criteria and indicators that reflect standards, indicators, certification criteria and examples of good practice from different cultural and geopolitical contexts from around the world, both in the field of tourism and other sectors.

The current criteria were initiated in November 2013: Global Sustainable Tourism Council Criteria for Destinations (GSTC CD) version 1.0 November 2013.

The respective criteria are divided into four sections:

⬎ **SECTION A**: MANAGEMENT - Implement effective sustainable development (demonstrate Sustainable destination management);

⬎ **SECTION B:** - Maximize the economic impact for the local community and minimize the negative impacts (Maximize economic benefits for the host community and minimize the negative impacts);

⬎ **SECTION C**: - Maximize the impact on the community, visitors and culture - and minimize the negative impacts (Maximize benefits for the communities, visitors, and culture; minimize the negative impacts);

⬎ **SECTION D**: - Maximize the positive environmental impacts and minimize the negative impacts (Maximize the benefits for the environment and minimize the negative Impacts).

GSTC measures the clear evidence of sustainability (visible to tourists), local identity, sense of place, actual state of environment, nature, heritage, actual community livelihoods and well-being, actual business involvement and impact from the tourism development in the past.

GLOBAL SUSTAINABLE TOURISM REVIEW - GSTR

At the ITB 2014 Berlin, a number of sustainable destination networks such as: VISTAS Awards for Good Practice and Destinations; Destin Innovation Group (DIG), ECOTRANS, EUCC's QualityCoast, EDEN Network and Alpine Pearls in partnership with VISION on Sustainable Tourism and Travelmole, introduced a new global tool called Global Sustainable Tourism Review under the title "GREEN DESTINATIONS."

Green Destinations is a non-profit organization and manages the whole GSTR tool:

⬎ Manages the GSTR platform

⬎ Reviews and issues ratings about destinations

⬎ Offers education and promotion.

⬎ Provides trainings for evaluators and partners - pick-up activities on national level.

⬎ Provides marketing assistance and support.

GSTR refers to the implementation of the Global Sustainable Tourism Criteria for Destinations GSTC (CD), which is fully integrated with the ETIS system of indicators of the European Commission. GSTR became a global platform for destinations aiming to improve sustainability in a transparent, clear and measurable way.

GSTR is a Destination Sustainability Support System, combining:

⬎ GSTC-based policy assessment tool aimed for policymakers and DMOs

⬎ Tool for policy benchmarking and improvement

⬎ Quality assessment and ranking related to sustainability which is aimed for the public

⬎ Common interface making destination ecolabels become transparent to TOs, OTAs, and the public.

Putting the GSTR into practice, locally = The Green Destinations Approach:

⬂ Bring key stakeholders together

⬂ Do a GSTR scan based on self-assessment – with verification and educational seminars for stakeholders

⬂ Joint identification of critical issues for improvement

⬂ Joint priority setting (GSTC-D as background guidance)

⬂ Quantitative monitoring of progress, using GSTR

⬂ Improved market exposure of sustainability profile

GSTR as a system:

1. It operates on both global and local level (the concept of 'Think globally, act locally').

2. Each step has been designed to help improve the sustainability of the destination.

3. It includes the power of numbers - it is a quantitative assessment effort, allowing for comparison (benchmarking) with destinations throughout the world.

4. Provides synergy between the providers and the destination (local community).

5. A low level of activity measurement (the tool works on the principle of self-assessments by three evaluators).

6. The tool opens the promotional channels and is linked with reservation systems.

7. GSTR fully integrates the indicators GSTC-D, which are enhanced with additional indicators (ETIS and QualityCoast).

8. ETOS Indicators represent 35% of all indicators, which means that GSTR is much broader. By completing the criteria, GSTR destinations gain deeper insight into their condition, which helps them to design improvements.

9. The result is a comprehensive assessment of the sustainability and assessment of individual criteria and indicators, which ensures the measurement of results in the long run.

10. Data is provided on the basis of statistics.

11. Self-assessment and information gathered from visitors' certification schemes and independent experts.

The steps to implement GSTR are as follows:

1. **Think globally, act locally:** A strategic approach based on common local ambitions

2. **The power of numbers:** A quantitative assessment of quality and sustainability

3. **Strong local economy:** Synergy between local businesses and the local community

4. **The power of benchmarking:** An agenda for visible improvement

5. **Progress from year to year:** A low effort monitoring program

6. **Competitive advantage:** Improved market visibility to consumers

The indicators are grouped into five sections:

A. Nature

B. Environment

C. Identity and culture

D. Tourism and business

E. Destination and safety

The organization Green Destination, which is based in Holland, is the owner and developer of the GSTR tool. The tool can be used for any destination to make FREE self assessment of sustainability performance. Destinations that wish to validate the results and make them recognized and promoted globally need to contact the Green Destination for evaluation of results. More information and fees for validation at http://greendestinations.info

ETIS TOURISM CRITERIA FOR THE SUSTAINABLE MANAGEMENT OF DESTINATIONS

The European Commission has long been involved in supporting the sustainable development of tourism in Europe. To date, they have introduced several instruments for better environmental management firms, such as the EU Eco-label and the Community eco-management and audit scheme (EMAS).

The European Commission has developed the ETIS system (European Tourism Indicators System (ETIS) for Sustainable Management at Destination Level), which represents a complete system (= covers all three pillars of sustainable tourism) and can be used in a simple way, thus being suitable for all types of destinations - with regard to destinations, it assists the monitoring, managing, measuring and promoting the sustainable measures.

The system is designed as procedure for monitoring, management and sustainable improvement regarding the functioning of tourist destinations. It presents a useful way of monitoring and planning the destination actions and their respective improvement towards sustainable development.

The system consists of a set of indicators (27 obligatory and 40 optional). It is easy to use (training is not required), and can be useful for success monitoring and as tool for better management decision-making. The system is designed to bring together all stakeholders and should have one facilitator, manager, coordinator that links the stakeholders and coordinates the actions.

The development of a European Tourism Indicator System for Sustainable Management at Destination Level is one of the key initiatives, which the Communication calls the European Commission to implement:

⤷ The European Indicator System aims to contribute to improving the sustainable management of destinations by providing tourism stakeholders with an easy and useful toolkit.

⤷ It will help stakeholders to measure and monitor their sustainability management processes, and enable them to share and benchmark their progress and performance in the future.

Motivation for Tourism Destination Monitoring:

A. Improved information for decision making

B. Effective risk management

C. Prioritization of action projects

D. Performance benchmarking

E. Improved community buy-in and support for tourism stakeholders

F. Enhanced visitor experience

G. Increased bottom-line / cost savings

H. Increased value per visitor

The steps to implement ETIS are as follows:

1. Awareness raising

2. Creation of DESTINATIONS profile

3. Setting up a working group

4. Definition of roles and tasks

5. DATA COLLECTION

6. ANALYSIS OF RESULTS

7. Continuous improvement system

ETIS criteria are divided into four sections:

1. Management of destination;

2. Economic value;

3. Impact on society and culture;

4. Impact on the environment.

! The key difference between GSTR and ETIS: GSTR scheme converts complex indicators into information that is meaningful to the end user. Therefore, the assessment of destinations obtained by using the GSTR tools is integrated into more and more reservation systems (currently a partner Booking.com BookDifferent, others in the process).

THE SUSTAINABLE TOURISM PLANNING TOOLKIT (STPT)

is produced by ANCI – The Italian National Association of Local Municipalities - as an output of the SeeNet Program with the specific aim to sustain capacity building for SEE municipalities in the field of sustainable tourism planning. It followed the adoption of the position paper "SEE Tourism Goes Local" which has the purpose to a) build common understanding about sustainable tourism development on local level in South Eastern Europe (SEE); b) encourage sustainable tourism planning and development across SEE by deploying the potential of NALAS; and c) build a common reference point for local municipalities and local government associations (LGA's).

Benefits of STPT:

❱ Understanding about the local tourism industry

❱ Formulation of tourism policy objectives

❱ Long term-focus

❱ Recognition of local governments role

❱ Formulation of policies according to local needs

❱ Facilitation of planning and development

❱ Better marketing

❱ Identification of financial requirements

The steps to implement STPT are as follows:

1. Situation Analysis

2. Strategic Planning

3. Implementation

4. Performance Measurement and Evaluation.

STPT is focused on strategic sustainable tourism development in destinations including:

➘ Awareness raising in the destination about the importance of sustainable tourism / education, motivation, benefits

➘ Determination of roles and responsibilities for development

➘ Data collection with focus on responsibilities, resources and ways of improvement.

➘ Details and good structure

STPT also includes recommendations about the selection of indicators based on the indicators produced by UNVTO in 2004.

A.3 Presentation of GDSEE

GDSEE is a combination of solutions developed by GSTR, ETIS and STPT. It consists of developed steps from the existing solutions which are tailored to the needs of local destinations. **The guide explains the process of stakeholder working group development, data collection, and taking action upon results.** It is designed as process with local ownership and leadership regarding the monitoring, management, and enhancement of the destination quality and sustainability.

The aim of GDSEE is to make use of the strong points of all three developed toolkits in order to provide an easy-to-use guide. The guide includes the experiences of sustainable tourism development on global level. It is spe-

cifically intended for tourism destinations. It is designed as process with local ownership and leadership regarding the monitoring, management, and enhancement of the tourism destination sus tainability.

GDSEE consists of set of indicators, toolkit, and dataset. It is formulated as an instrument that any destination can pick up and implement without any required specific training. It can be a useful way to track the destination performance and make better management decisions, as well as influence the creation of adequate policies.

The Indicator system is laid down on the basic principle that the responsibility, ownership, and decision-making of the destination are shared. One powerful way to undertake effective destination management is to engage a group of people that work together in order to collect and report information.

GDSEE includes a combination of indicators developed by the GSTR and ETIS systems. The indicators can be used on voluntary basis, whereby they can be used along with or integrated into the existing destination monitoring systems. Therefore, the system is flexible. It can be further expanded or contracted to meet the needs of the destination and the interest of local stakeholders, as well as to tackle the specific sustainability issues that the destination faces.

GDSEE is organized as a guide to sustainable tourism. With regard to the data and system that were used for development of this toolkit, GDSEE combines different approaches within the whole document:

➘ **STPT** / GDSEE integrated a number of toolboxes designed for data collection (evaluation of natural assets, visitor's demand, local economy…). It uses a wide range of possible activities and actions that one destination can use in the process of analysis. In addition, there is a chapter focused on the strategic planning of tourism development based on the outcome of collected and evaluated data.

⭷ **ETIS /** GDSEE adopted the steps designed by ETIS toolkit (awareness raising, stakeholder management, data collection through surveys, evaluation and strategic planning of improvements. The entire system of ETSI set of indicators is also used.

⭷ **GSTR /** Destinations that want to create a wide picture about sustainability are encouraged to use the GSTR tool on top of ETIS evaluation. Destinations trying to position themselves on the market of sustainable destinations should do the GSTR self-assessment and join the partnership of Green Destinations with the use of external evaluation. In this way, the destination will gain access to benchmarking, marketing and positioning on global markets.

GDSEE follows the steps prepared for the ETIS system and upgrades them with wider information gained from STPT. Thus, GDSEE **becomes a simple, easy-to-implement tool intended to help destinations in management and monitoring to ensure greater sustainability**.

1. **Step one:** Awareness raising = once the destination decides to implement the toolkit, it needs to raise awareness among all stakeholders and involve them to participate.

2. **Step two: Stakeholder management =** determination of key stakeholders from among the public, private and non-governmental sector, tourism and other fields; their inclusion in the process; setting up a working group; definition of key stakeholders and group members roles and tasks and setting the concept of the work. Strong destinations rely on local stakeholders and entrepreneurs, who are encouraged to invest in quality and sustainability as basis for strong local economy. Profit on local level should in turn enhance the investments and creation of jobs on local level.

3. **Step three: Data collection and analysis of results =** creation of destination profile that defines the destination input in terms of size and traffic, collection of statistics, surveys, and self-evaluation. Use of indicators: global, European, regional, national indicators = **Think globally, act locally.** Analysis of results is used for the purpose of setting goals.

4. **Step four: Strategic planning** = SWOT analysis, setting goals, action plan, development strategy, monitoring. Establishment of sustainable management system along with strategic planning, evaluations on regular basis and improvements. Required activities must be integrated into the municipal work programs, the work programs of DMO, as well as in the activities of individual stakeholders. Measurement of the progress in order to ensure sustainability in the long run.

5. **Step five: Marketing and positioning** = planning of sustainable marketing and communication strategy, global positioning, benchmarking in order to provide competitive advantage in comparison with other destinations.

A.4 How to use the GDSEE toolkit

This Toolkit is designed to be used by local governments and the competent staff responsible for destination management in the tourism sector. It is aimed to be a valuable planning tool, which can be used along with statutory and non-statutory local planning documents.

Currently, many local authorities do not have designated staff members responsible for the tourism sector. The use of the GDSEE will be most effective

if there is a designated staff member responsible for tourism sector, who can take the role of coordinator and contact point for all actors within and outside the government. The implementation of the tourism strategy does not only require analysis and planning, but also active and ongoing partnerships between the public and private sector.

For that reason, the toolkit introduces the position of Coordinator for implementation. The coordinator must a person who is well familiar with the destination performance. Given that the toolkit refers to the tourism, it is recommended that the responsibility for the project is with the local tourism authorities. It can be in the form of municipal department or a destination tourism office if such organization exists. The coordinator should be a person acting in the name of that organization and will be held responsible for all steps, starting from stakeholder management to action planning. The work of the coordinator requires that s/he receives training. If such person cannot be identified in the respective destination, the work can be carried out by an outsourced assistant. However, it is of key importance that this person is supported by the authorities.

Any user of the guide must follow this toolkit step by step and use all the attached documents. In addition, the system should be tailored to the needs of destination. The Toolkit can be used in two ways:

➘ To tackle specific issues associated with the development and management of tourism, including data collection;

➘ To develop a comprehensive tourism strategy.

The most important steps after the awareness raising and stakeholder management are the data collection process and analysis of destination per-

formance. One can encounter a situation whereby it is not practical to obtain all of the information included in the Toolkit. However, it is suggested that one can work through the available material and develop an action plan or a tourism strategy which builds on the knowledge which is at disposal, and note any information gaps that might be addressed in the future.

The aim of the action plan or the tourism strategy is to ensure improvement of the situation, which means that goals need to be set and monitoring of progress, should be put in place.

The demand for sustainable tourism products is on the increase. Consumers are looking for authentic experience, well-protected nature, and responsibly managed destination. Therefore, it is of key importance to communicate the efforts and achievements to the wider audience. We suggest that the destination joins the Green Destination community and apply the GSTR evaluation for planned actions. The GSTR evaluation enables the destinations to gain in-depth insight into the destination performance and it can reveal information which was omitted in previous research. Furthermore, the GSTR will offer the destination a third party evaluation and a numeric result of the sustainability: the score is measured according to indicators whereby the consumer gets a clear message about the sustainability of the destination. In that case, the GSTR evaluation is introduced as key marketing tool for positioning on global markets. The GSTR evaluation results will also allow the local authorities to get benchmarking opportunities and will aid the positioning of the destination on local, regional, European and global markets.

B

Raise awareness and gain support

Once a destination makes a decision to become a green destination and use a toolkit, the decision must be communicated to as many people as possible, particularly to the local stakeholders. This will aid the increased participation, the awareness raising about the destination's commit ment to the sustainable management of tourism, and increased support for activities and actions that might need to be undertaken based on the results from indicators.

Local Destination Coordinators should use all methods of communication at their disposal and make sure that this is also done by their local authority/municipality. Social media can be useful and cost effective for fast and simple communication. Additional benefit is that social media can easily stimulate discussions, which will be particularly valuable as the implementation is under way.

All stakeholders in the destination should be informed about the planned actions and invited to participate. The more support gained, the easier to implement the next steps.

Ideas for communication:

↘ *Include news about the destination's involvement with the European tourism indicator system on the organization's webpage and relevant social media networks.*

↘ *Encourage local reporters from printed and electronic media as well as online discussion forums to spread the word through their own blogs, etc.*

↘ *Partner organizations, particularly the ones interested in the local tourism industry, the environment and the local community will be also keen to circulate the news amongst their supporters.*

↘ *Development of media campaigns within the destination.*

C

Stakeholders management

Destination planning and development occurs in a complex set of institutional and public-private arrangements among different organizations, including the non-governmental organizations. Given that one organization cannot individually tackle complex policy problems such as the ones occurring in the tourism sector, partnership should become the dominant "common sense" of tourism policy, especially on local level. It should become an element of tourism governance which is taken for granted either for tourism marketing and promotion or for urban redevelopment projects where tourism is integrated through retail, sport, entertainment and property development.

C.1 Determine a Local coordinator

This Toolkit is intended to help stakeholders measure and improve their destination's sustainable development. It is therefore important to determine a local coordinator who is motivated to initiate the implementation of the System in their destination.

This could be:

> ⤡ *A senior representative from the destination management organization, destination marketing board, tourist board, local/regional tourism authorities, tourism ministry, private sector or tourism association.*

> ⤡ *An expert hired to play the role of coordinator.*

The role of Local Destination Coordinators normally includes the planning, management, monitoring, promotion, marketing, and can also include training and quality standards. The role of Local Destination Coordinators is crucial. To take on the role, an individual will need to be able to gather and influence

stakeholders, to access relevant data (or ability to access it through others), be entrusted to store the data (some of it may be sensitive), and have some level of management authority.

The Local Destination Coordinator should aim to steer stakeholders towards agreement on allocation of responsibilities for setting targets, taking action and planning how to achieve the targets.

C.2 Identification of key stakeholders and creation of a stakeholder working group

Prior to the start of the tourism planning process, local governments should carry out a comprehensive stakeholder analysis, in order to prioritize, select and differentiate the stakeholders according to their power, importance and urgency.

The following groups of stakeholders can be usually identified in the tourism sector:

> ⤡ *On local level: mayor, city council, local tourism council, local sustainable development councils (committees), regional councils, destination management agencies and NGO sector.*

> ⤡ *On the LGA level: knowledge managers, PR officers, executive directors.*

> ⤡ *On national Level: relevant ministries in charge (tourism, economy, etc), ministry of regional development, ministry of finance, ministry of transportation and communications, national councils for sustainable development and customs offices.*

❧ *On private sector level: economic chambers, associations of tourist guides, associations of hotel and restaurant owners, association of national tourist agencies, advertisement agencies, licensed tourist agencies, mass media, universities of tourism and union of employers.*

❧ *On international level: international and European agencies, with particular regard to those involved in the tourism sector, the European Commission, national chambers of commerce, ANCI, CIFCA and other Associations of Towns and Regions of art and history and Towns with protected areas, biodiversity networks, sustainable development organizations.*

An ideal group will be large enough to include a diverse group of key stakeholders, but at the same time it should not be that large in order to avoid difficulties in decision-making. Local Destination Coordinators will need a group of people with different skills who are able to obtain relevant data and influence the policy, and who are also motivated and committed to the process.

If destinations already have an existing committee or taskforce that convenes for similar purpose, it would make sense if attempt is made to integrate the indicator work into the scope of work of the existing group, (this can be done by providing explanation on the implications, gaining consent, and if necessary, by inviting some other members).

Stakeholder Working Group meeting is the most effective way to involve all relevant stakeholders.

Important stakeholders who are considered that must take part in the stakeholder group are as follows:

❧ *Regional/local tourism organization and tourism development company*

❧ *Local planning, transport and rural/urban development departments*

❧ *Waste management department (water and solid waste)*

❧ *Water supply department or company (local and regional)*

❧ *Energy department and / or supplier*

❧ *Police / security department*

❧ *Forestry/protected area or Parks management department*

❧ *Airport / port authority (if applicable)*

❧ *Local hotel or tourism association*

❧ *Tour guide, camping, caravan, villa, apartment associations*

❧ *Relevant non-governmental organizations*

❧ *Local chamber of commerce*

❧ *Tourism employee associations and / or unions*

❧ *Relevant academic institutions involved in associated research*

The most effective way to involve all relevant stakeholders is by inviting them to an open workshop. At this event, the system and its relevance can be presented and explained to both the destination and the participating individuals. Ideally, this meeting should be held in a fairly central location within the destination.

At the meeting, the **Local Destination Coordinator should also present the specific indicators**, receive stakeholders' feedback on the most useful and relevant indicators for the destination and consider the availability of existing data about each of the various concerned indicators.

Given that the meeting is participatory, **group members can be invited to share their knowledge and experience about particular aspects of the destination. Thus, i**t is important to listen to the stake holders as well as to speak. Furthermore, the group should be enabled to understand the process and be assisted in reaching agreement about further progress.

C.3 Establish Roles and Responsibilities

An important outcome of the meeting is a clear agreement about the responsibilities of the group mem bers and a timeline for data collection, i.e. the respective shareholders that collect data for certain indicators, the manner of collection and the timeframe. This process will not only assist the prioritization of data collection for core indicators, but will also generate a sense of ownership and commitment to the process.

Examples: the representative from the municipality waste disposal team should be able to report back data on recycling rates, the representative from the local electricity provider on energy consumption, etc.
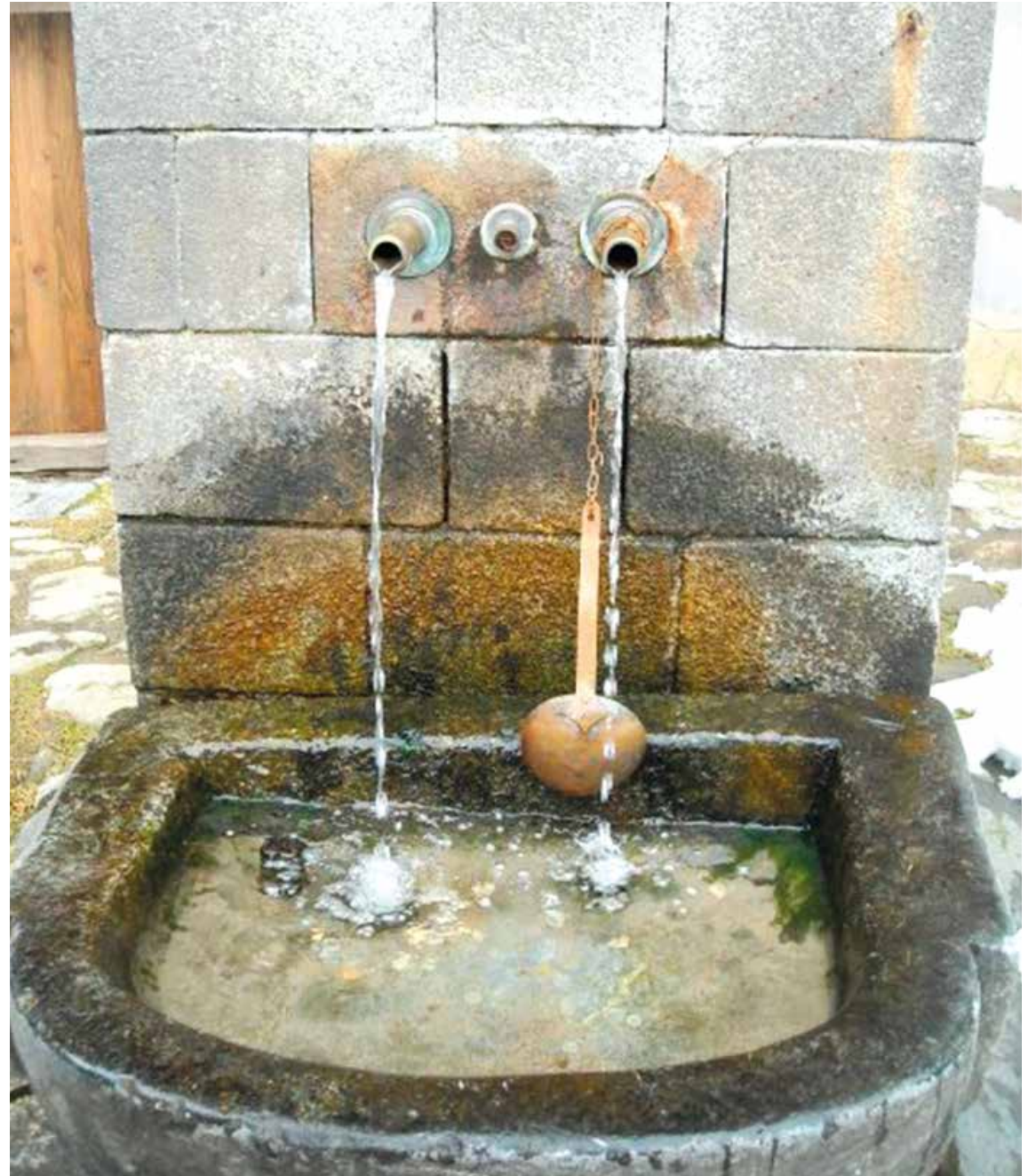
D

Collect and record data

Data collection is one of the most important but also one of the hardest steps of the evaluation process. In order to collect relevant data, the destination should include all stakeholders and provide clear and effective solutions for analysis. Part of the data collection is obtained from statistics, but some research needs to be done as well. Regarding the evaluation of visitors; and residents' satisfaction, the destination should prepare surveys. Data from tourism providers can be obtained either by conducting surveys or through workshops, focus groups, and interviews.

Most of the indicator data should be readily available from each group member's sector, given their employment and interest, or be accessible through other authorities, e.g. on national level. In essence, the **data collection should be a process of bringing the various data sources together at one place to create a detailed picture of the destination's tourism industry.** Some of the indicator related data might be missing or some might need to be expanded. This information can be sourced by conducting surveys, ques tionnaires and other types of activities.

Data collection process consists of following steps:

⬊ Creation of destination profile: including natural assets

⬊ Gathering statistics and information from the public sector: Public sector survey (prepared in advance, including evaluations), Public sector infrastructure

⬊ Gathering information about visitors: visitors; survey (prepared in advance), including the visitors' demand and satisfaction

⬊ Gathering information about the community: inhabitants; survey, inclusion of community tourism toolbox

D.1 Create a destination profile

One destination can be defined as:

⬊ A geographic area that is currently or potentially attractive to visitors/tourists

⬊ A place or area which is recognized and can be easily defined as visitor destination and disposes of a range of facilities and products in place for tourism purposes

⬊ A place or area which is promoted as destination

⬊ A place or area where it is possible to measure the supply and demand for tourism ser vices i.e. the visitor economy.

⬊ A place or area where the visitor management process usually includes a range of public and private sector stakeholders together with the host community

The definition of destination's boundaries and enabling other stakeholders to have a general overview of the destination are crucial steps in the data collection process. This can be done with the help of the ***Destination Profile Form*** *which is part of Excel spreadsheet (***Annex: Destination Evaluation***). The profile form is simple to complete. It includes basic information about the geography, tourism amenities, transport links, and number of visitors to the destination.

NATURAL ASSETS

Toolbox is included in the Annex: Toolboxes / natural asset

Given that the responsibility for management of natural resources belongs to the local governments, this toolbox is helpful to

A. Identify local natural assets;

B. Appreciate the significance of natural assets which may be used for tourism in the destination;

C. Plan the sustainable management of these assets in the context of tourism.

There are a number of benefits for local governments that adopt a structured approach towards management of the tourism impact on natural assets. Indeed, it assists the fostering of clean, green image, and thus sustaining the tourism industry to remain profitable and effective. It is also essential to ensure sustainability and continued enjoyment of those assets for both tourism and recreation. Yet, despite their importance, many natural assets usually neither have specific management guidelines for minimising the visitors' impacts, nor dispose of useful information on which to base decisions.

The management of natural assets by the local government is a complex issue. Various approaches are being used to meet this need. It could be useful to develop decision support tools (e.g. checklists, best practice databases) to build on these.

The available approaches include the following:

a) Portfolio model

It includes the work on the ground within the destination to create portfolios of natural assets by type and later management of the natural assets based on these groupings (e.g., caves, hot springs, outstanding landscapes, etc.).

b) Case-by-case best practice cross-referencing approach

Given the diversity of settings and circumstances of local governments, it is preferable if tourism impact is managed in an adaptive manner in the short term. It means that one should borrow the functional parts of the best practices. Therefore, a database of "best practice" should be constructed in order to further guide the local government's action.

c) Stand-alone mixed-strategy checklist

Another possibility is a more hybrid approach, recognising that municipalities may adopt a limited portfolio for particular natural assets, but with the safeguard of action-guiding checks and balances. A mixed strategy checklist is therefore provided in order to ensure a guide in the decision-making about the best course of action depending on the specific natural assets in the destination. (See **Annex: Toolboxes / natural asset**)

DESTINATION PROFILE

Spreadsheet is included in the Annex: Destination Evaluation. This form can be used to provide the stakeholders with an overview of the destination:

Destination profile includes:

↘ **Destination:**

↘ **Country:**

↘ **Destination Boundary:**

↘ **Location:** description, distance from the national capital city (km), main types of tourism and most popular activities, top five most popular tourist attractions (including environmental and cultural attractions).

↘ **Geography:** approximate size of the destination (in km²) and principle physical characteristics (rivers, hills, bays etc). Dominant habitats (place an X against all that apply), average sunshine hours,

↘ **Weather pattern:** rainfall (precipitation) and seasonal temperatures

↘ **Transport links:** distance from nearest local and international airport (in km), public transport facilities to your destination (place an X against all that apply), additional private arrangements for transporting visitors to the destination

↘ **Population:** number of permanent residents, percentage of population employed in tourism related jobs

↘ **Tourists: number of visitors annually** in total and broken down by principal market, annual arrivals by type of transport, average tourist expenditure (per person/per day), average length of stay

D.2 Gather statistics and information from the public sector

The Local destination coordinator should be able to act as the point of contact for collation of the indicator data collected by the group members. The Destination Dataset, which is a simple tool, is provided to allow the coordinators to upload the data on the various indicators that are received from stakeholders. This document enables that the results of the data collection are captured and easily shared with the key stakeholders.

PUBLIC SECTOR INFRASTRUCTURE

The increased numbers of visitors, particularly the overnight visitors, place a significant demand on the public sector infrastructure in the towns.

Each town has its own profile in terms of demand seasonality, proportion of holiday homes and day visitors compared to its permanent resident population, as well as to industrial and commercial visitors. This demand must be managed through appropriate utilities and infrastructure, including public roads, water, waste-water and waste services, parking and signage, museums, art galleries, sporting facilities, visitor centres, reserves, gardens and other amenities, while at the same time identifying sites for development.

These services include:

↘ Water supply

↘ Wastewater management

↘ Solid waste management

↘ Electricity supply (where local government is service provider)

Toolbox is included in the Annex: Toolboxes / Public Infrastructure

This Toolbox helps to estimate visitor use of such services, so that planning and management can better meet the needs of all stakeholders in the "VICE" model (visitors, industry, community and the environment). Tourism can place significant demands on services and this is not uncommon; for instance, in some small communities it is not unusual that it accounts for a relevant share of the total annual water use. As visitor numbers increase, so does the pressure on services. Besides, different visitor profiles represent different demands on the public sector infrastructure.

Good information about the usage of public infrastructure by visitors enables the local government to make better plans about tourism development. It also allows for informed debate about the policies for imposing charges for public infrastructure, and helps secure funding for additional infrastructure. Yet, few local governments dispose of data which are necessary to make quality decisions.

This Toolbox contains resources to help local governments gather such data. It recommends that an integrated and systematic approach to addressing infrastructure issues is adopted. Good planning, design and management of infrastructure helps achieve sustainable economic development, efficient services and optimal benefit from the use of public funds.

In this Toolbox there are a number of resources that local governments can use to collect data and provide a better understanding of public sector infrastructure, covering:

- Potable water supply and consumption data;

- Wastewater services and production data;

- Solid waste services;

- Data collection;

- Snapshot studies;

- Private sector infrastructure.

DESTINATION MANAGEMENT SURVEY

In order to gather data from the public sector in the municipalities, one option is to conduct surveys.

Example of survey can be found in the Annex: Surveys / Public sector.

The survey should provide answers for evaluation of the following indicators (Indictors are included in Excel Annex: Destination Evaluation)

- Number of tourists/visitors per 100 residents

- Percentage in which the destination is represented by a destination management organization

- Does your destination management organization represent all of the communities within your geographical jurisdiction?

- Relative contribution of tourism to the destination's economy (% GDP)

- Direct tourism employment as percentage of total employment

- Number of beds available in commercial accommodation facilities per 100 residents

- Occupancy rate in commercial accommodation facilities per month and in average for the year

❱ Percentage of the destination covered by sustainable tourism strategy/ action plan, with agreed monitoring, development control and evaluation arrangement

❱ Percentage of the destination covered by a policy that promotes local, sustainable and/or fair trade products and services

❱ Percentage of the destination covered by a policy or plan that protects cultural heritage

❱ Percentage of the destination's biggest events that are focused on traditional/local culture and assets

❱ Percentage of the destination included in climate change adaptation strategy or planning

❱ Percentage of destination (area in km2) that is designated for protection

❱ Percentage of destination covered by a biodiversity management and monitoring plan

❱ The destination has policies in place that require tourism enterprises to minimize light and noise pollution

❱ Percentage of destination and percentage of population covered by local strategy and/or plans to reduce noise and light pollution

❱ Percentage of destination served by public transport that is accessible to people with disabilities and people with specific access requirements

D.3 Gather information about visitor

Visitors are one of the key stakeholders in the destination, given that they have direct interest from sustainability, and on the other hand, they are the ones that make pressure on the destination. Therefore, it is of key importance to understand the expectations and interests of visitors. But, also it is important to provide solutions which limit the negative and increase the positive impact on the destination.

VISITOR DEMAND

Understanding the number of visitors and their use of infrastructure/amenities while visiting a destination, is essential to enable effective planning for tourism by local authorities and tourism businesses. This section provides tools that enable to check what is known about visitors in a specific area and ways to obtain data on the current and future numbers of visitors.

An essential starting point is to have a clear definition of what is meant by visitor industry. In general terms, it includes international and domestic overnight and day excursionists. **These three categories can be further refined in specific groups:**

❱ International: overnight, day trips

❱ Domestic: overnight, day trips

❱ Local: day trips

The tourism industry would not exist if it wasn't for visitors, so it is critical in the first instance to understand the characteristics and behaviour of visitors to the area. This ensures that one is informed and able to address specific issues that exist or may

arise in the future. Besides the tourists who come to visit tourist attractions and engage in different activities (e.g. visits to cultural sites, wine tasting, sunbathing), the visitor market also includes families that visit another city for a day to attend a sporting event and conferences or visit friends/relatives. Therefore, the definition of "visitor" is a very broad definition.

The understanding of the visitors' demand will provide essential data that help destination managers to plan the future tourism infrastructure needs and develop related strategies.

Toolbox is included in the Annex: Toolboxes / Visitor demand toolbox

VISITOR SATISFACTION

The success of a tourism industry relies on the visitor satisfaction. Failure to meet and exceed visitor expectations will lead to reduction in the number of visitors and the associated economic benefits to the area. Local governments should therefore measure visitor satisfaction, particularly through the implementation of visitor satisfaction surveys, which would also help to identify the strengths and weaknesses of the destinations against competitors.

Toolbox is included in the Annex: Toolboxes / Visitor satisfaction toolbox

This Toolbox will help to ascertain whether all the necessary information about visitor satisfaction in the destination is available, considering that it is not only concerned with accommodation or activities. Local governments do provide the essential services and infrastructure which enable the tourism industry to operate. If these services are below standard, visitors will not be fully satisfied. This

places considerable pressure on local authorities to ensure that visitors have positive first impression about the place as well as in consequent utilization of services.

Thus, conducting visitor satisfaction surveys is significant as it provides a customer focused basis on which to set priorities for actions that would improve the destination products. They can provide useful basis for setting priorities and allocating funding to improve the tourism products.

This process has a number of benefits, including:

- Providing a customer-focused basis for planning and action;

- Helping to identify comparative strengths and weaknesses. Under-performance against competing destinations can make a strong influence on decision makers;

- Providing solid grounds for seeking additional resources for a project;

- Raising the profile of visitor management and building support for tourism;

- Encouraging improved standards from external suppliers;

- Building civic pride from positive findings;

- Helping to identify best practices across a range of areas;

- Demonstrating improvement over time against benchmarks and measuring the impact of capital expenditure on visitor-related projects.

In order to be able to collect the necessary data for indicator evaluation, a survey should be carried out. The survey should provide the answers for evaluation of the following indicators:

Example of survey can be found in the Annex: Surveys / Visitor Survey.

The survey should provide answers for evaluation of the following indicators (Indictors are included in Excel Annex: Destination Evaluation):

- Average travel (km) by visitors from and to destination on the same day

- Average travel (km) by tourists to and from home or average travel (km) from the previous destination to the current destination

- Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)

- Percentage of visitors using local/soft mobility/public transport services to get around the destination

- Numbers of overnight stay by tourists per month

- Average length of stay of tourists (nights)

- Average length of stay of same day visitors (hours)

- Percentage of visitors that repeat the trip/return to the destination (in period of 5 years)

- Daily spending per tourist (accommodation, food and drinks, other services) Daily spending per same day visitor

- Percentage of visitors who are satisfied with their overall experience in the destination

- Percentage of visitors with disabilities or specific access requirements who are satisfied with the accessibility of the destination

D.4 Gather information about community

Tourism is a visible industry and often it utilizes the same services as the local community. Thus, it tends to encourage a high level of community interest and involvement, unlike the agriculture and other industries, which often take place out of the sight of the local community. Negative impacts, whether real or perceived, can especially attract considerable attention.

COMMUNITY TOURISM

Destination management must ensure that tourism meets both the expectations of the community and the visitors. Local governments are well placed to guide the process and give their own contribution respectively. This Toolbox includes checklists and survey methodologies that help the identification of information necessary to learn about the attitudes of the community towards tourism in the destination, and consequently to collect the respective information.

Consultations are particularly important as they allow for community input into the planning and management of tourism, which in turn ensures that tourism can achieve community's economic and social goals, through:

- Confirmation that an initiative is appropriate;

- Support for new initiatives;

- Raised awareness about tourism within the community;

- Increased pride in the destination and its offer to visitors;

- Creation of welcoming attitude to visitors.

On one hand, tourism can bring benefits to many sectors of the community, but on the other hand, it also brings along potential challenges which communities may need to tackle by use of appropriate strategies.

Community Views and Opinions

The process of surveying and understanding the views and opinions of the community about tourism can be both time consuming and expensive, and therefore one should make careful selection of the sources of information. They may include the following:

- Elected representatives;

- Community groups: residents' associations, youth and women's groups;

- Interest groups: recreation, environmental, cultural, heritage groups;

- Industry: not only the tourism industry, but also other sectors which may be affected by tourism;

- Individuals: people interested in specific issues, but not belonging to an organisation.

Surveying Community Views and Opinions

The methods used to gather community views and opinions will depend on:

- The specific nature of the issue;

- The complexity of the issue;

- The size of the community to be consulted;

- How the information will be used;

- The available budget and timeframe.

Sample Sizes

Sample sizes are driven mainly for statistical reasons. Typically, there is a need to have 384 respondents to achieve a standard error of plus or minus five per cent in any estimate of a (large) population derived from a sample.

There is no recommendation about the absolute size - it is just a matter of accepting a larger standard error if the sample is smaller. For smaller populations, the size can be reduced, however, according to the rule of thumb; a reasonable accuracy still requires a sample of about 200 respondents in any small town. This means that for a town of 600 residents, a large proportion of the residents have to be sampled.

Statistical Analysis

Comprehensive surveys generally require computer-assisted data analysis to obtain the information required. It is unlikely that comparisons between different variables can be completed successfully without specific programmes (or technical support). "Excel", "Access" and "SPSS" are commonly used programmes.

Toolbox is included in the Annex: Toolboxes / Community Tourism toolbox

RESIDENT SURVEY

This survey contains a list of questions which can be used to collect the necessary information about the resident data related indicators.

Example of survey can be found in the Annex: Surveys / Resident Survey.

The survey should provide answers for evaluation of the following indicators (Indictors are included in Excel Annex: Destination Evaluation):

- ⬎ Percentage of residents who are satisfied with tourism in the destination (per month / season)

- ⬎ Percentage of residents satisfied with their involvement and their influence in the planning and development of tourism

- ⬎ Percentage of residents who have positive or negative views on the impact of tourism regarding the destination identity

D.5 Gather information about the industry

This chapter looks at the supply side of tourism – the accommodation, transport, attractions and activities available for visitors to the destination. It helps to identify the tourism product which exists in the area as well as any gaps and opportunities for development.

While the private sector operates as the major supplier of tourism product, the responsibility for tourism development rests with the local government as the enabler. When the peak tourism demand is planned in advance, there is an opportunity to shape tourism development and also improve the likelihood of meeting the expectations of the community, rather than simply responding to the development pressures. In order to fulfil this responsibility, local governments need to be aware of the demand levels for all the key elements of the tourism product, such as accommodation and transport, and be proactive in ensuring that supply can match demand.

TOURISM INDUSTRY INVENTORY

One municipality can take a proactive approach to ensure that it disposes of the tourism products that attract and retain visitors by:

- ⬎ Undertaking a review of the number, range and quality of visitor attractions in order to make a "gap" analysis related to the market needs and consequently undertake work with the tourism industry, developers and investors to identify the development opportunities and potential sites.

- ⬎ Implementing specific studies about the accommodation sector, so that to ensure that as demand increases, the "lag" with the opening of new facilities is minimal, given that the shortage of accommodation facilities can be a significant "barrier" for the development of the sector.

- ⬎ Being aware of the need for all tourism products identified in this Toolbox and taking proactive approach to ensure that "visitor demand" is matched by adequate "supply".

The inventory of tourism products identifies the opportunities and constraints that a local government encounters in attracting visitors. Gaps in the product range and/or poor quality facilities will make the places less attractive to visitors. Lack of transport and accommodation facilities will deter visitors from travelling to and stopping at the destination. Until an inventory of attractions, activities, accommodation and transport has been completed and matched with an understanding of the visitor demand and satisfaction, destinations cannot be certain whether they are meeting visitor expectations.

In terms of setting priorities about the requirements for tourism development, the tourist attractions and tourist activities are the key areas to be considered. Visitors come to a destination "to see and do things". Attractions do provide this opportunity, which is often directly managed by the local governments for the benefit of visitors (and residents).

Toolbox is included in the Annex: Toolboxes / Tourism Industry Inventory toolbox

This Toolbox contains checklists to review the number, range and quality of tourism products in the destination, and identify any gaps.

The inventory will help to identify any obvious gaps in the provision of tourism product. These may need to be addressed in the Strategic Planning Section. It will also permit to identify the physical and man-made attributes that emphasise the local distinctiveness of the destination. This will be particularly relevant in determining the competitive advantages and marketing strategies.

ECONOMIC IMPACT

Tourism contributes both to income generation and jobs creation. Thus, knowing the economic value of tourism is important in order to gain understanding about the benefits that tourism can bring to a community. This can be estimated directly through direct tourist expenditure for goods and services or indirectly through inter-business transactions in the domestic economy.

Nevertheless, the economic impact of tourism on the municipality level is difficult to be quantified from existing national statistics. Yet, it is this local impact which is most important for local governments and businesses, as it provides a picture of what is happening locally and enables comparison with competing destinations.

This section provides checklists and survey methodologies that enable to determine the economic impact of tourism on local level. Once information about the economic contribution of tourism is obtained, it can be further used to:

↘ Determine the priority for tourism in the local policies as a contributor to the economic development of the destination;

↘ Help evaluate whether current and potentially increased expenditure on tourism facilities and marketing is a sound investment, thus providing economic and social benefits for residents and businesses as well as for the local government.

Once the checklist about the economic contribution of tourism is completed, one can confirm the already available information, which are the further needs and the current uncertainties. The other part of the Toolbox will help to fill in any information gaps.

Toolbox is included in the Annex: Toolboxes / Economic Impact Toolbox

INDUSTRY SURVEY

In order to determine the sustainability of the travel industry and evaluate the related indicators in the destination, an industry survey can be used.

Example of the survey can be found in the Annex: Surveys / Industry Survey.

The survey should provide the answers for evaluation of the following indicators (Indictors are included in the Excel Annex: Destination Evaluation):

⭦ Indicate your type of business:

⭦ Percentage of seasonal jobs in tourism

⭦ Percentage of tourism enterprises providing student internships

⭦ Percentage of men and women employed in the tourism sector

⭦ Percentage of tourism enterprises where a woman holds the position of general manager:

⭦ Average wage in tourism for women compared to average wage for men (sorted by type of job in tourism)

⭦ Average price per room in the destination

⭦ Percentage of tourist attractions which are accessible to people with disabilities and/or participating in recognized accessibility schemes

⭦ Percentage of commercial accommodation facilities with rooms accessible to people with disabilities and/or participating in recognized accessibility schemes

⭦ Percentage of tourism enterprises that have been inspected for fire safety in the last year

⭦ Percentage of ten largest tourism enterprises involved in destination management/ cooperative marketing.

According to the World Tourism Organization, indicators are measures of the existence or severity of current issues, signals of upcoming situations or problems, measures of risk and potential need for action, and means to identify and measure the results of government's actions. Information sets are formally selected for particular indicator areas to be used on regular basis and measure the changes of importance for tourism development and management.

Indicators can measure the following:

- Changes in tourism own structures and internal factors;

- Changes in external factors which affect tourism;

- The impact created by tourism.

Both quantitative and qualitative information can be used for indicators of sustainability. An indicator is normally selected from a range of possible data sets or information sources because it is meaningful with regard to key issues to which tourism managers must respond. The use of respective indicator can lead to taking action in order to anticipate and prevent undesirable (or unsustainable) situations at destinations.

In the context of sustainable development for tourism, indicators are considered as time series information, which is strategic to the sustainability of the destination, its assets, and ultimately for the fortune of the local tourism sector.

In any destination, best indicators are the ones that respond to the key risks and concerns regarding the sustainability of tourism, and also provide in-

formation that helps clarify issues and measure responses. Indicators will normally respond to issues concerning the natural resources and environment of a destination, concerns relating to economic sustainability, issues relating to cultural assets and social values, and more broadly to organization and management issues, both within the tourism sector and the broader destination.

INDICATORS ARE SET OF CRITERIA MEASURED TROUGH DIFFERENT TOOLS:

- respond to the key risks and concerns regarding the sustainability

- provide information which can help clarify issues and measure response

- provide data for evaluation and benchmarking

- communicate with consumers

The indicator system developed by European Commission (ETIS) was used as a key measurement tool in the GDSEE. Also, GDSEE recommends that the destination joins the Green Destination program and evaluates the performance through the GSTR indicator system.

Destinations that use this tool for indicators should follow the next steps:

- **Evaluation based on the ETIS indicators / ETIS Indicators are included in the Annex: Destination Evaluation:** Evaluation is done on the basis of collected data and conducted surveys by Industry, Visitors, Public Sector, Residents. Data is then evaluated and entered in the previously prepared Excel sheet. Recorded data is further used for the purposes of strategic planning.

E
Data evaluation, use of indicators

⬂ Evaluation based on GSTR indicators / GSTR Indicators are included in the Annex: GSTR tool: On top of evaluation based on ETIS indicators, we also suggest evaluation by use of GSTR indicators. Evaluation is made by data collection and self-assessment and valorization of the outcomes by third party. The result is a globally recognized numeric result that offers global positioning, marketing and basis for planning in the destination.

E.1 Using ETIS indicator system

ETIS Indicators are included in the Annex: Destination Evaluation

Overview of the ETIS Indicators with short explanation of indictors:

Section A: Destination Management

A.1 Sustainable Tourism Public Policy

A.1.1 Percentage of the destination covered with sustainable tourism strategy/action plan, with agreed monitoring, development control and evaluation arrangement

⇒ *The existence of plan and policy for tourism development in a destination is the fundamental first step towards sustainability. Ideally, the plan should be multi-year plan and it should include: environmental, social, quality, health and safety issues; have clear, time-bound goals; and be developed with the participation of all relevant stakeholders. The existing plan may need to be adapted or refocused on sustainability. It should also be publicly available and communicated externally.*

A.1.1.1 Percentage of residents satisfied with their involvement and their influence in the planning and development of tourism

A.1.1.2 Percentage of the destination which is represented by a destination management organization

⇒ *Consultations and ensuring that communities are represented are also vital for sustainable tourism. These criteria seek to understand if interested residents are engaged with tourism planning, and if so, if they are satisfied with their involvement and influence. It also measures the extent to which they are included and represented.*

A.2 Sustainable Tourism Management in Tourism Enterprises

A.2.1 Percentage of tourism enterprises/establishments in the destination using a voluntary verified certification/labeling for environmental /quality/ sustainability and /or CSR measures

⇒ *DMOs cannot create sustainable destinations on their own. This indicator examines the sustainability planning and management on business level, so it assesses the extent to which enterprises are actively incorporating sustainability principles into their operations and if they are involved in recognized (or qualified) eco-certification programs and sustainability reporting procedures.*

A.2.1.1 Number of tourism enterprises/establishments with sustainability reports in accordance with the Global Reporting Initiative (GRI)

⇒ *This indicator seeks to determine the number of enterprises that have submitted a globally accepted sustainability report.*

A.3 Customer Satisfaction

A.3.1 Percentage of visitors who are satisfied with their overall experience in the destination

⇒ *Along with DMOs and enterprises, customers are the crucial third component of the sustainable desti nation management. Satisfied customers return to the destination, multiply their economic value and generate jobs.*

A.3.1.1 Percentage of repeat/return visitors (in a period of 5 years)

⇒ *Visitors who return and become loyal, repeat visitors are often more economically beneficial to the destination. Monitoring the percentage of repeat visitors is very important.*

A.4 Information and Communication

A.4.1 The percentage of visitors who note that they are aware of the sustainability efforts in a destination

⇒ *DMOs have an opportunity to raise tourists' awareness of sustainability issues and give sustainable enterprises a marketing advantage through promotional materials. It is important that sustainabil ity information is communicated consistently throughout DMO and other organizations' marketing materials. This indicator is designed to encourage the information sharing and communication of sus tainability issues and achievements.*

A.4.1.1 The percentage of businesses that communicate their sustainability efforts to visitors in their products, marketing or branding

⇒ *Educating visitors about sustainability issues and initiatives in the destination is one of the roles of a sustainable destination. This indicator measures the sustainability content of visitor information.*

Section B: Economic Value

B.1 Tourism Flow (volume & value) at Destination

B.1.1 Number of tourist nights per month

B.1.1.1 Relative contribution of tourism to the destination's economy (% GDP)

B.1.1.2 Number of 'same day' visitors in high season and low season

B.1.1.3 Daily spending per same day visitor

⇒ *This measure shows the importance of tourism for the destination. A high percentage may suggest economic vulnerability due to overreliance on tourism. Comparing day and overnight visitors is important to better understand the spending patterns and economic impact of day visitors. While overnight visitors spend more, day visitors are often important for retailers.*

B.1.2 Daily spending per tourist (accommodation, food and drinks, other services)

⇒ *Note: destinations such as parks with few overnight visitors should use tourist days per month. Tourism volume and value are critical to the economic sustainability of a destination. Making sure basic tourist monitoring is incorporated into sustainability monitoring helps ground other aspects of the monitoring. The higher the spending per day, the more efficient the tourist destination is at generating tourism value.*

B.2 Tourism Enterprise(s) Performance

B.2.1 Average length of stay of tourists (nights)

B.2.1.1 Average length of stay of same day visitors (hours)

B.2.1.2 Percentage of ten largest tourism enterprises involved in destination management/cooperative marketing

B.2.2 Occupancy rate in commercial accommodation facilities per month and average for the year

⇒ *Destination sustainability affects the performance of individual enterprises. The average length of stay of tourists in number of nights is one of the most important indicators for accommoda tion businesses. Longer stay results in higher occupancy rates, which is the other key indicator for accommodation. The longer tourists stay, the higher the return on investment for marketing and sales and greater impact for hospitality businesses.*

B.2.2.1 Average price per room in the destination

⇒ *The longer visitors stay in a destination, the more they spend. Increasing the average hours spent in a place and monitoring the increase is a useful indicator of performance. Working collaboratively is an indication of the level of trust among members of the tourism com munity and it ensures that diverse perspectives are included in sustainable tourism development. The indicator measures to what extent tourism businesses are collaborating. Revenue per available room (REV PAR) is important because it incorporates both room rates and occupancy. At a destination-level, it shows how well the destination is filling the rooms as well as how much it is able to charge for the rooms.*

B.3 Quantity and Quality of Employment

B.3.1 Direct tourism employment as percentage of total employment

⇒ *In addition to direct economic benefits from visitor spending, job creation is one of the most attrac tive characteristics of tourism for most governments. Not all jobs are created equally, however; decent work, year-round work, and work that offers training and gender equity is more likely to contribute to the quality of life improvements for residents than seasonal unskilled jobs for mini mal wage. These indicators not only measure the number of jobs created but also the quality of the employment.*

B.3.1.1 Percentage of seasonable jobs in tourism

B.3.1.2 Percentage of tourism enterprises providing student internships

⇒ *A true measure of tourism's employment generation and value, needs to consider the seasonal var iation in employment. Also, the skill level of tourism employees is indicative of the quality of the employment. This indicator helps assess how many local tourism enterprises are helping to train the next generation of travel and tourism professionals.*

B.4 Safety and Health

B.4.1 Percentage of tourism enterprises inspected for fire safety in the last year

Keeping track of which properties have been inspected improves the inter-departmental coordination and helps ensure that an enterprise does not consistently avoid inspection, and, therefore, presents a risk to visitor safety.

B.4.1.1 Percentage of tourists who register a complaint with the police

⇒ *A sustainable destination is responsible in front of its visitors to take reasonable steps for ensuring safe and healthy holiday environment. This includes the monitoring of the levels of crime against tour ists and also the levels of crime committed by tourists to ensure that tourism is not generating an increase in criminal behavior that will adversely affect the local population, incur additional local costs and negatively influence the reputation of the destination.*

B.5 Tourism Supply Chain

B.5.1 Percentage of tourism enterprises taking active steps to source local, sustainable, and fair trade goods and services

⇒ *Connecting tourism businesses with local producers and suppliers of tourism-related goods and services helps multiply the economic impact of tourism in the destination. Agriculture and fishing sectors are particularly well positioned to benefit from tourism. These indicators encourage fair trade business connections on local level.*

B.5.1.1 Percentage of the destination covered by a policy promoting local, sustainable and/or fair trade products and services

B.5.1.2 Percentage of tourism enterprises sourcing a minimum of 25% of food and drinks from local/regional producers

⇒ *Implementing a policy to promote responsible purchasing helps to leverage the purchasing power of the destination and provide a greater amount of local, sustainable and fair trade of products and services. Sourcing local products increases the*

economic value of tourism. Tracking this figure will help DMOs explore ways to increase the connection between tourism and local agriculture.

Section C: Social and Cultural Impact

C.1 Community/Social Impact

C.1.1 Number of tourists/visitors per 100 residents

⇒ *Resident satisfaction is a key indicator of the social impact of tourism on a community. Keeping track of changes in the levels of satisfaction, and comparing these to the levels of tourist flow can help the identification of problems in advance so those can been addressed and directly influence the planning deci sions.*

C.1.1.1 Percentage of residents who are satisfied with tourism in the destination (per month/season)

C.1.1.2 Number of beds available in commercial visitor accommodation facilities per 100 residents

C.1.1.3 Number of second/rental homes per 100 homes

⇒ *Checking on resident satisfaction on a regular basis is an important gauge for visitor experience. Being alert to changes in levels of resident satisfaction and taking action where necessary is fun damental to sustainable tourism. Tracking the number of available beds in a destination is a way of measuring the relative impact of tourism on residents' way of life. Having large numbers of rental properties can change the nature of a destination, particularly when rental properties outnumber resident homes. Keeping a check on the balance of rentals and resi dencies can help address this issue before it becomes a problem.*

C.2 **Gender Equality**

C.2.1 **Percentage of men and women employed in the tourism sector**

⇒ *The tourism sector has gained reputation for providing employment opportunities for both men and women. It is important that tourism employment statistics are analyzed by gender so that this situation is publicly available. It is also important to review levels of employment by gender to ensure that both men and women are moving up the career ladder.*

C.2.1.1 Percentage of tourism enterprises where the general manager position is held by a woman

C.2.1.2 Average wage in tourism for women compared to average wage for men (sorted by tourism job type)

⇒ *To ensure both men and women are equitably represented and paid at varying levels of tourism employment, including management positions.*

C.3 **Equality/Accessibility**

C.3.1 **Percentage of commercial accommodation with rooms accessible to people with disabilities and/or participating in recognized accessibility schemes**

C.3.1.1 Percentage of destination covered by public transport that is accessible to people with disabilities and people with specific access requirements

C.3.2 **Percentage of visitor attractions that are accessible to people with disabilities and/or participating in recognized accessibility schemes**

⇒ *Sustainable tourism is tourism that is open to all and breaks down barriers to access. This criterion addresses the issue of equality of access for people with disabilities. Monitoring accommodation and attractions that are making adjustments for people with disabilities helps raise awareness of the need for these facilities. Public opinion polls about the satisfaction with accessibility provide additional depth of infor mation.*

C.3.2.1 Percentage of visitors satisfied with the accessibility of the destination for those with disabilities or specific access requirements

⇒ *Measuring transport accessibility helps identify potential obstructions for accessibility. Monitoring visitor satisfaction with accessibility helps planners know whether they are meeting visitor needs.*

C.4 **Protecting and Enhancing Cultural Heritage, Local Identity and Assets**

C.4.1 **Percentage of the destination covered by a policy or plan that protects cultural heritage**

⇒ *Cultural identity is under threat worldwide. When heritage buildings are destroyed or replaced with modern structures, the character of the destination changes. Having a policy to identify, protect and enhance the built (tangible) and other cultural heritage e.g. music, (intangible) is vital to the sense of place and resident pride. Holding festivals and opinion polls that consider the residents' view about the impact of tourism on destination identity are both important.*

C.4.1.1 Percentage of residents who have positive or negative views on the impact of tourism on destination identity

C.4.1.2 Percentage of the destination's biggest events that are focused on traditional/local culture and assets

⇒ *This indicator is a barometer of tourism's cultural impact. Holding events focused on local culture can be an effective means of increasing pride.*

Section D: Environmental Impact

D.1 Reducing Transport Impact

D.1.1 Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)

D.1.1.1 Percentage of visitors using local/soft mobility/public transport services to get around the destination

D.1.2 Average travel (km) by tourists to and from home or average travel (km) from the previous destination to the current destination

⇒ *Transport to and around a destination contributes to greenhouse gas emissions and local air pollution generated by tourism. Tracking the distance that visitors travelled and the mode of transport they used helps the awareness raising about this issue and encourages the improvements in the use of environmentally-friendly transportation for tourism.*

D.1.2.1 Average travel (km) by same day visitors from and to destination

⇒ *Tracking the use of reduced traffic and, environmentally-friendly (soft mobility) transport options can help to inform local transportation policies. This information helps to identify the cost of distance and the environmental impact of attracting day visitors from nearby areas.*

D.2 Climate Change

D.2.1 Percentage of tourism enterprises involved in climate change mitigation schemes—such as: CO2 offset, low energy systems, etc.—and "adaptation" responses and actions

⇒ *Climate change mitigation (reducing the impacts) and adaptation (responding to some of the inev itable impacts) strategies need to be considered in every sector of the economy but particularly in tourism, as many businesses are located in areas vulnerable to flooding, drought and other impacts. This criterion highlights the importance of integrating climate change awareness into sus tainable tourism planning and management.*

D.2.1.1 Percentage of the destination included in climate change adaptation strategy or planning

D.2.1.2 Percentage of tourism accommodation and attraction infrastructure located in "vulnerable zones"

⇒ *Including the whole destination in climate change initiatives is important. This indicator monitors the extent of omissions in order to encourage inclusion. The second indicator is designed to raise awareness of climate-related vulnerability.*

D.3 Solid Waste Management

D.3.1 Waste volume produced by destination (tones per resident on annual or monthly basis)

D.3.1.1 Percentage of tourism enterprises separating different types of waste

⇒ *Keeping track of private sector engagement shows the effectiveness of awareness raising initiatives and the need for incentives in this area*

D.3.2 Volume of recycled waste (percent or per resident per year)

⇒ *Tourism activities significantly contribute to the solid waste generation in a destination. Solid waste reduc tion can and should be addressed at a destination and enterprise level. Reduction initiatives include economic incentives, recycling, composting, and reuse programs.*

D.4 Sewage Treatment

D.4.1 Percentage of sewage from the destination treated to at least secondary level prior to discharge

⇒ *Tourism heavily contributes to the pressure on the sewage treatment stations. In particular, this is a major concern in destinations dominated by beaches, lakes, and rivers. Effluent can cause severe environmental and health problems and create a negative image of the destination if not properly treated.*

D.4.1.1 Percentage of commercial accommodation facilities connected to central sewage system and/or employing tertiary sewage treatment

⇒ *Central sewage or tertiary systems are most effective in reducing water-borne pollutants. Raising awareness of the scale of this issue in the destination is the first step towards finding a solution.*

D.5 Water Management

D.5.1 Fresh water consumption per tourist/ night compared to general population water consumption per person/ night

⇒ *The tourism sector utilizes significant quantities of water. Water is also a critical resource for tourism. This is a particular issue for destinations where water is in short supply, and increased water usage may result in hardship for existing residents.*

D.5.1.1 Percentage of tourism enterprises with low-flow shower heads and taps and/or dual flush toilets/waterless urinals

D.5.1.2 Percentage of tourism enterprises using recycled water

D.5.1.3 Percentage of water use derived from recycled water in the destination

⇒ *Tracking tourism enterprise engagement in water conservation helps gauge the success of water conservation initiatives that will result in saving money for enterprises. Using recycled grey water can be an effective reduction strategy for garden irrigation. These indica tors track how widely implemented these initiatives are at the tourism enterprise and destination level.*

D.6 Energy Usage

D.6.1 Energy consumption per tourist/ night compared to general population energy consumption per person/ night

⇒ *The tourism sector is a key energy user. Comparing tourist use to resident use highlights the inefficien cies and is useful for planning purposes. Where destination energy production relies on fossil fuels, this is a concern for climate change and economic sustainability. Tracking energy usage, conserva tion, and the sector's energy footprint helps guide energy conservation programs.*

D.6.1.1 Percentage of tourism enterprises that have switched to low-energy lighting

D.6.1.2 Annual amount of energy consumed from renewable sources (Mwh) as a percentage of overall energy consumption

⇒ *Tracking tourism enterprise engagement in saving energy helps gauge the success of energy-sav ing programs and initiatives. This indicator tracks the destination's progress in converting to renewable sources of energy.*

D.7 Landscape and Biodiversity Protection

D.7.1 Percentage of destination (area in km2) that is designated for protection

⇒ *Protected areas are a key asset of a destination's tourism product. High biodiversity helps ensure the sustainability of natural areas, benefits the destination's image and is attractive to tourists. This measure highlights the importance of investing in landscape and biodiversity protection and the tourism sector's role in supporting this process.*

D.7.1.1 Percentage of local enterprises in the tourism sector actively supporting protection, conservation, and management of local biodiversity and landscapes

D.7.1.2 Percentage of destination covered by a biodiversity management and monitoring plan.

⇒ *Tourism enterprises are significant beneficiaries of investment in protected areas, so it is important to track the sector's contribution to conservation. This is an indicator of the activities of conservation agencies and the existence of risks to key spe cies.*

D.8 Light and Noise Management

D.8.1 The destination has policies in place that require tourism enterprises to minimize light and noise pollution

⇒ *Light and/or noise pollution may be a significant source of disturbance for resident communities and stress on wildlife in some destinations. These issues may be of particular concern in areas with an active night-time economy and isolated rural settings, star-gazing areas, turtle nesting sites, and mountain retreats, for example. Policies for beach/waterfront lighting, noise-levels and time for noise reduction need to be considered for current and future/proposed development.*

D.8.1.1 Percentage of the destination and percentage of population covered by local strategy and/or plans to reduce noise and light pollution

⇒ *Light and noise pollution can cause significant disturbance to residents and local wildlife. This indi cator highlights destination policies in this area.*

D.9 Bathing Water Quality

D.9.1 Level of contamination per 100 ml (faecal coliforms, campylobacter)

⇒ *Water bathing is a primary attraction for many European tourism destinations. Ensuring the qual ity and safety of lake, river or sea water is of paramount importance. Any exposed risks can have a significant impact on destination attractiveness. These are also an indication of ineffective waste water treatment.*

D.9.1.1 Number of days beach/shore closed due to contamination

⇒ *Beach closures have a significant impact on the economic viability of a beach resort. Making this information public increases awareness of the need to resolve water quality issues.*

For example. A strong point of destinations in South East Europe refers to the ethnical varieties, traditions and local specifics. This means that indicators about ethnical specifics and cultural heritage should be added.

E.2 Obligatory indicators, Optional indicators

Obligatory and optional indicators are marked within the spreadsheet in the attached file. **ETIS Core and Optional Indicators are included in the Annex: Destination Evaluation:**

Core indicators

Core indicators are the starting point for measuring the level of sustainability of tourism in your destination. Initially, the destination may find it difficult to obtain data for all the Core Indicators. In that case, start with available data and look for ways to gather data in the future. There are 27 core indicators divided in four sections.

Optional indicators

Optional indicators are more relevant to destinations that have more advanced sustainability systems in place. There are 40 optional indicators divided into the same four sections as the Core indicators.

E.3 Regional and national indicators

Each destination, country or region has its own characteristics and local stories to tell. That is why each destination should think about introducing additional indicators which would be most suitable to the specific situation.

E.4 Using global GSTR indicator system

GSTR Indicators are included in the Annex: GSTR tool

GSTR works as the upgrade of the evaluation process and is done separately. The destination can choose to use the system or stay with the evaluations done by ETIS toolkit. The upgrade of the GSTR brings added value to the evaluation and positioning process.

How to use the GSTR toolkit

Toolkit works as manual for destination managers using the free GSTR Self-Assessment form to assess their destination. This form is part of the Destination Assessment tool developed by QualityCoast1 and by the Global Sustainable Tourism Review (GSTR/Green Destinations). A different GSTR Destination Assessment tools exist for mountain destinations.

BENEFITS OF USING THE TOOL:

1. The completion of the assessment tool, even partly, will help destinations to get insight into their strengths and weaknesses from an international perspective. The quality and sustainability of your destination will be evaluated, thus taking into consideration: Nature & Biodiversity; Environment; Identity & Culture; Tourism & Business; Host Community & Safety. This serves as basis for destination policy development and planning.

2. The completion of the assessment tool will increase the QC-score of your destination (% Sustainable), which is displayed to consumers on several websites, incl. in Booking.com, the affiliate BookDifferent.com. This serves as basis for destination promotion.

3. The assessment provides the destination with a list of points that require attention as a basis for an Agenda for Improvement.

HOW DOES IT WORK?

A destination makes use of the Self-Assessment Form, as it provides data and self-assessments for all relevant indicators (usually without clarification or references to sources).

Destinations should take the following steps (see the attached GSTR evaluation sheets):

❯ Provide general information.

❯ Quality- follow the instructions and rate the destination. Address all the indicators in the colored cells and as many as possible in the non-colored cells, if relevant data is available.

❯ Policy- continue addressing all indicators where relevant data is available. Bear in mind that the results of the assessment will be more exact if more relevant information is provided.

❯ Forward the data to the national coordinator and Green destination authorities for third party evaluation. The outcome will include the following information:

  ↳ an indication of the strong and weak points of the destination according to the 20 criteria;

  ↳ an indication of destination GSTR-score (% of sustainable destination);

Important: See the attached GSTR manual and work sheets for evaluation. More information and contacts at http://greendestinations.info.

E.5 Evaluation

Once the indicator data has been collected and submitted by stakeholders, and collated into the Destination Dataset, the Local Destination Coordinator can call a further meeting of the stakeholder group. The group can then review and analyze the results, decide on some realistic benchmarks or targets, and agree a plan on how to proceed.

According to the analysis results, the work group should undertake evaluation of each result. The results should be checked and agreed upon. Each group member will prepare proposal for improvements / how much a certain indicator could be improved in certain period of time. This should be in line with the municipality's planning and strategic development process.

Once the targets are determined, a number of actions should be predicted to reach the target. Actions are integrated into the planning process. The results are also used for benchmarking with similar destinations within the country, region, Europe.

F

Strategic Planning

Once the stakeholder group has put action plan in place to tackle the immediate priorities, they can start the development of long-term improvement strategy. The aim should be to draw up a three-year plan which outlines what the group expects to achieve and when, with areas of responsibility clarified. Each member of the group should be able to commit to some small improvements in their own particular area of work, that will add up to significant changes and improvements over time.

The scope of strategic planning depends on the development scale of tourism.

Destinations with developed strategic plan for tourism will adopt the strategy according to the outcomes of the evaluation. They will include the planned activities for improvements into action plans.

Destinations without developed strategic plan can use the guidelines from the next chapters (Strategic planning and Action planning) for implementation of the results from the evaluation phase.

The evaluation phase will provide the destination with an insight in the tourism performance. However, the main purpose of GDSEE is to use that information for setting goals of improvements, planning of actions and performance management.

PERFORMANCE MANAGEMENT:

Performance management can be divided into three distinct elements that are linked to each other both conceptually and practically: selecting indicators, setting targets, and taking actions to influence scores on the indicators and the extent of target achievement [Boyne, 2010]. However, the focus of performance measurement and management has changed through time in accordance with what constitutes "government performance" and "measurable results". Performance measurements shift the focus from inputs and efficiency towards measurement of "outcome" indicators.

A comprehensive performance management system should therefore distinguish between:

↘ *Objectives*: quantitative and qualitative specification of the services to be delivered by the administration unit (output goals) and the outcomes to be achieved through these services (outcome-goals);

↘ *Input* (with what?): the resources (personnel, financial, etc.) necessary to deliver the services/performance of an administration unit;

↘ *Production/Process* (how?): activities within public administration to deliver the required outputs/performance;

↘ *Output* (what?): products and services delivered by an administrative unit, to achieve the program goals;

↘ *Outcome* (to what end?): impact of the administrations' outputs on a specific target group.

The central dimension of performance measurement/assessment would include:

↘ *Effectiveness*: Assessing/Judging goal achievement by comparing program goals (outcome goals) with achieved outcomes

↘ *Efficiency*: Assessing/Judging productivity by measuring the relationship between inputs/costs and outputs/products (Input / Output)

↘ *Economy*: Assessing cost control by comparing planned and actual resources
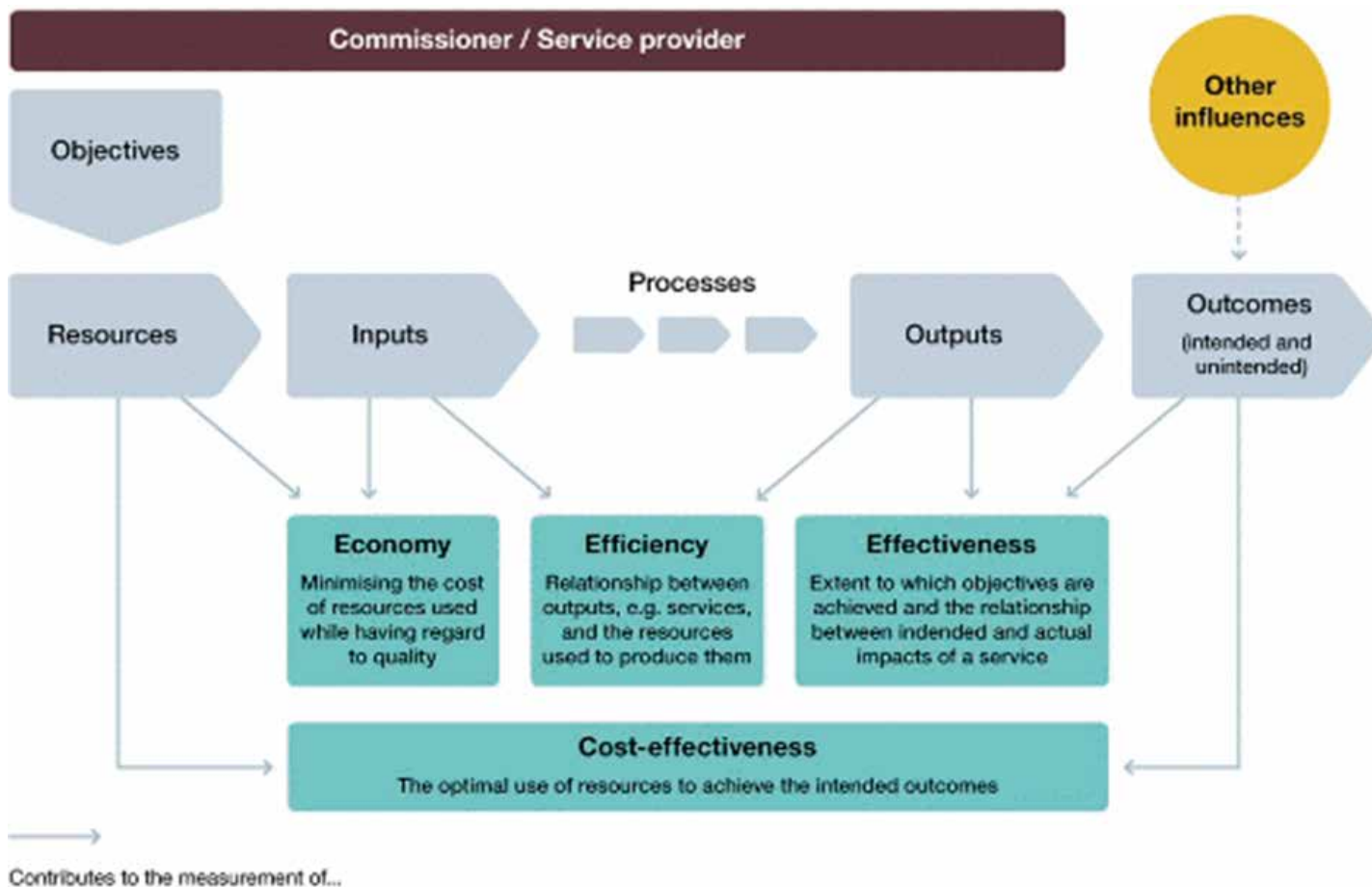
Relationship between Inputs, Outputs and Outcomes
Source: UK Comptroller and Auditor General (2001)

F.1 Setting goals within indicators results

Local Destination Coordinators can decide together with the stakeholder group members which are the priority issues for the destination and then agree to take action.

Once issues have been prioritized, those requiring most urgent attention can be compiled into a plan (i.e. which indicators and issues require action, in what order, when, how, and by whom).

Example: the group may feel that saving and storing water is the highest priority issue for the destination. In this case, members will need to work together to come up with an action plan to implement water conservation. The destination's water provider could champion the plan, by the local equivalent of the hotel association, and/or by the local coordinator. The stakeholder group may also be able to make improvements in more than one indicator at a time, i.e. perhaps when communi cating with hoteliers on saving water; it may also be possible to engage them in saving energy and/or improving biodiversity.

Goals can be set in the Excel spreadsheet, for each indicator. See Annex: Destination Evaluation.

The goal setting for each indicator should take into account the visibility to achieve the plan. Each of the set goals should be accompanied with respective plan how to achieve it.

Example: if visitors are not familiar with the sustainability of the destination and we want to improve that experience for 10%, one has to make further investigation of the developments. Why are visitors not familiar with the actions? Are they communicated to the visitors? Is the massage included in the promotional materials? According to the results, the destination

needs to take action and improve the performance by taking action in the form of distribution of brochures, organization of communication campaign, etc.

If the outcome of the analysis is that the strategic planning is not in place, the destination should undertake the preparation of a strategic planning model.

F.2 Strategic planning

Why is the local government developing a tourism strategy? Presumably, this is so because it recognizes the potential benefits. The development of tourism strategy would include the following elements:

a) Understanding the local tourism industry

The tourism industry is diverse, therefore it is important that local authorities understand the needs of the wide range of sectors that comprise the tourism industry.

b) Formulation of tourism policy objectives

The formulation of tourism policy objectives is important in order to:

- Recognise tourism as a social and economic force;

- Foster and create community awareness of the benefits from tourism;

- Guide and influence the development of sustainable tourism

- Provide the basic facilities and infrastructure to encourage tourism development;

- Ensure facilities are adequate to cater for visitors;

- Ensure tourism development is consistent with the characteristics of the region.

c) Long term-focus

The approval of a tourism strategy is also important since councillors and industry sector representation may be replaced, but a policy document can ensure the continuity of commitment. Thus, a tourism strategy enables a long-term focus, forward planning and budget allocations for an integrated and co-ordinated approach.

d) Recognition of local governments' role

Often, local governments are the providers of substantial *visitor infrastructure*, along with other levels of government and governmental agencies. A policy document can be the driving force for all key actors to co-operate and attend to the needs of tourists, thus bringing benefits for the community.

e) Formulation of policies adherent to local needs

The tourism strategy allows the local governments to develop specific policies, programs and plans so that to obtain a balanced development of tourism, including:

- Protection of sensitive areas, heritage and cultural assets;

- Local government's role in the provision of visitor information services;

- Use of historic buildings for tourism purposes;

- Proposals for specific areas of land;

- Traffic flows resulting from tourism development;

- Acceptable levels of environmental impact;

- Regional and local tourism organisations input into policies.

f) Facilitation of planning and development

As visitor numbers increase and demand for facilities (e.g. accommodation) grows, local governments have a role to play in determining when and where new facilities may be required. This can stimulate the private sector to invest at the appropriate time and in areas where the development can complement other related services. The tourism strategy does also facilitate the planning of infrastructure and amenity provision, considering that additional visitors and demand for new facilities may determine the need for improved infrastructure (e.g. water/wastewater, solid waste, roads, parking, and public toilets)

g) Better marketing

While many local governments are not directly involved in visitor marketing, they can play a major role in supporting marketing on regional level by recognising tourism as an important economic development tool and ensuring that their investments in infrastructure and services shall support the objectives of the tourism industry. Some activities can also assist the destination marketing through promotion of events and ensuring safe and visitor friendly environment.

h) Identification of financial requirements

The formulation of the tourism strategy allows the local governments to specify adequate annual and middle-term budget allocation in the local government's financial plan. It may also include recommendations from the tourism industry regarding the provision of amenities and infrastructure improvements, which can be essential elements in making a destination attractive to visitors (e.g. parks and gardens, streetscape). The necessity for the local authorities to work with the tourism industry is paramount to ensure making informed strategic decisions about the local government's role in the development of the local tourism industry.

Once the stakeholder group has an action plan in place to tackle immediate priorities, a strategy for long term improvement can be developed. The aim should be to draw up a three year plan which outlines what the group expects to achieve and when, along with clarified areas of responsibility. Each member of the group should be able to commit to some small improvements in his/her own particular area of work, which over time, will add up to significant changes and improvements.

The steps of strategic planning are as follows:

a) Organising the Tourism Strategy Planning Process

The process of planning the tourism strategy would be best if undertaken by a group of people that represent the key areas of industry, the community and the environment. This will ensure that these groups "buy-in" the strategy while project priorities and budgets are being specified.

The strategy planning process should be informed by the analysis information. In particular, given that visitors are unlikely to take part as stakeholders in the process, yet, their views and opinions should be incorporated.

VISION
The future state and achievements required for tourism

↓

GOALS
Broad based targets for tourism (e.g. improve the tourism experience associated to key local natural and cultural attractions)

↓

OBJECTIVES
Specific measured achievements required (e.g. 80% of visitors are very satisfied with their visit at local natural and cultural attractions)

↓

STRATEGIES
The method by which objectives will be achieved (e.g. undertake a review of tourist services at key natural and cultural attraction and identify key actions)

Tourism Strategy Planning Process

Other relevant inputs would come from:

all relevant policies, laws and plans on national and regional level, along with local regulations and plans that directly or indirectly affect tourism;

strategic analysis, such as "PEST" and "SWOT" applied to the tourist destination.

After conducting the PEST and SWOT, the local government can consider the most important factors from a wider perspective. This can assist the prioritization of actions if they are urgent and imply short-term or long-term tasks. It also helps the organisation to define and develop co-ordinated and goal-directed actions, which would take a long way towards full completion of the strategic plan.

However, after the completion of the PEST and SWOT analysis, the government should be ready to structure its strategy planning process, by defining the *Vision*, *Goals*, *Objectives* and *Strategies*.

b) Developing the Vision

The vision for tourism is the guide that leads to successful industry for all stakeholders – visitors, industry, communities and the environment. This ensures that the local government does not solely focus on an internal vision, but includes an external vision.

c) Goals for Tourism

Goals include general aspirations and directions, and should encompass the four key areas identified in the Toolkit - visitors, industry, communities and the environment. Goals are neither usually expressed in measurable terms, nor are time-related. Some examples are presented below.

d) Objectives for Tourism

The objectives for tourism should focus on the four key areas identified in the Toolkit - visitors, industry, communities and the environment. Some examples are presented below.

e) Strategies for Tourism

Strategies identify the range of alternative courses of action in order to achieve the objectives. They should again focus on the four key areas identified in the Toolkit - visitors, industry, communities and the environment. Some examples are presented below.

f) Community Outcomes

Community outcomes are the desired results that the community considers important for its wellbeing. They originate from the judgement of the community regarding the promotion of its wellbeing and belonging to the community.

Therefore, the local government should take into consideration what may be undertaken for the promotion of the achievement of outcomes in the community as part of the preparation of its long term plans. Moreover, the local government will be one of the numerous governmental (regional, national) institutions that are capable of promoting the outcomes, and needs to consider its role alongside the role of all the other actors.

The purpose of the community outcomes process is to:

1. Stimulate debate about local needs and priorities;

2. Inform and guide the planning of the local governments and other actors;

3. Ensure that local governments work along with other actors (Regional tourism organizations, Destination tourism organizations, tourism businesses);

4. Encourage people to take part, promoting the benefits of the process to the tourism sector);

5. Provide a basis for communities to measure their progress (the extent to which the outcome has been achieved).

Local communities can design a process that identifies the community outcomes that work best for them. For example, local governments may recognise that some community outcomes may be best pursued by groups of local governments working together, and maybe also with other actors (e.g. regional government, tourism sector). Given the disparate nature of tourism, this could be a useful device for integration of various sectors and destination areas into a broad perspective which is often required for tourism planning.

Therefore, local governments should:

- Involve other organisations or groups which can assist the identification and promotion of community outcomes;

- Make attempt to gain consent from these groups regarding the process for identifying outcomes and the relationship between these and any existing plans;

- Develop a process that encourages the public to participate;

- Ensure agreement by the groups regarding the processes for monitoring the progress against the community outcomes, if practicable.

The diagram identifies the relationships between tourism activities, outputs and outcomes that could be part of due consideration of tourism by local governments.

g) Consultations

The primary purpose of consultations is to enable the local governments and its community to exchange information on decisions and issues of concern. Consultations involve seeking advice and it is a two-way process of exchanging information. The consultations should be implemented according to the following principles:

- Provision of information. The local government should provide information to the affected parties regarding the decision in order to help them present their views (e.g. residents adjacent to a proposed new hotel, tourism businesses subjected to a proposed new tourism rate, etc.);

- Encourage parties to present views. The local government should request and welcome the views of those who are interested in a particular decision (e.g. hotel association, incoming travel agents, residents);

- Explain the scope of consultation. Potential submitters should be informed about the purpose and focus of consultations (e.g. impact on the environment from proposed new visitor activity);

- Give reasonable opportunities for presentation of one's views. Anyone who wishes to express one's views before the local governments should be given a reasonable opportunity to present those views in a way that is appropriate to the needs of the submitter (e.g. in written, in person, as part of a broader group);

- Thinking outside of the box. Although local gov-

ernments may have working plans in mind, they must be prepared to listen to and consider all submissions with open-mindedness;

⬊ Give reasons for decisions. Local governments should provide information to submitters on any of the taken decisions and the respective reasons for such decision-making (e.g. proposed tourism project declined).

Toolbox is included in the Annex: Toolboxes / Strategic Planning Toolbox
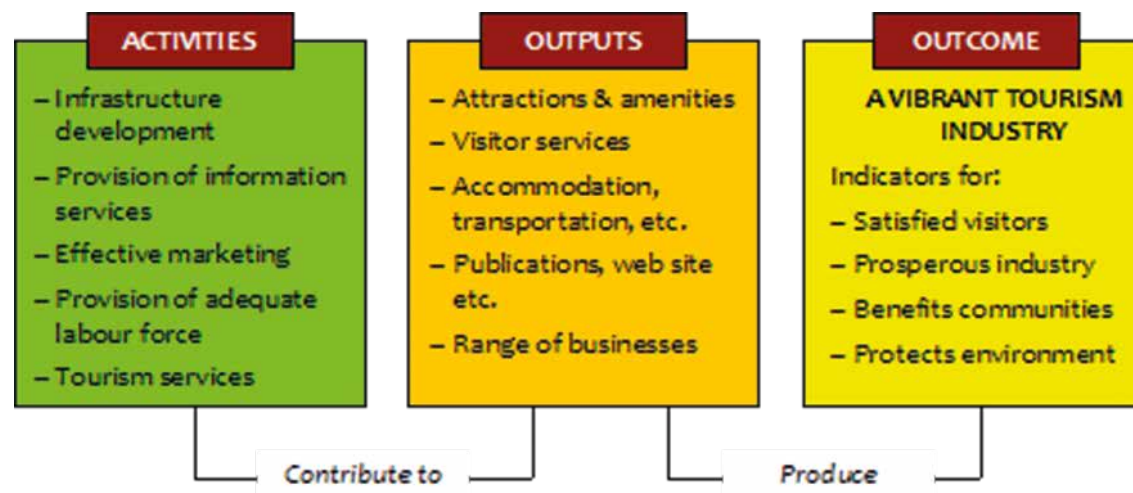
ACTION PLANNING

An action plan is part of the strategic planning and implies putting words into action. If the destination disposes of a tourism development strategy, the action plan will focus on the issues that were recognised throughout the evaluation process. They will address the achievement of established goals. When the process of strategy development is under way in a destination, the action plan will focus on making the respective strategy alive and active.

Action planning is the key process which examines the relations between the tourist strategy and other statutory government planning tools, such as:

a) Mid-to Long Term Local Development Plan

The tourism strategy should fit into a mid-to long term strategic plan, which sets the government priorities for a period of 3 to 10 years. This would

ACTIVITIES	OUTPUTS	OUTCOME
– Infrastructure development – Provision of information services – Effective marketing – Provision of adequate labour force – Tourism services	– Attractions & amenities – Visitor services – Accommodation, transportation, etc. – Publications, web site etc. – Range of businesses	A VIBRANT TOURISM INDUSTRY Indicators for: – Satisfied visitors – Prosperous industry – Benefits communities – Protects environment

Contribute to   Produce

The Relationship between Activities, Output and Outcomes

outline the intentions of the local government to contribute to the community wellbeing for the period in which the plan is valid. The review should be undertaken around every three years and it should cover a period of at least ten years.

Its provisions would therefore offer good opportunity to the local governments for development of a rigorous tourism planning process which would finally result in a tourism strategy for the destination.

The mid-to-long term strategic plan would:

- Set out the community outcomes and how the local authority intends to contribute to them;

- Set out the activities of the local governments during the life of the plan;

- Co-ordinate the activities of the local authority;

- Provide a long-term focus for the local authority;

- Provide a means for communities to hold the local authority accountable;

- Provide an opportunity for the public to participate in local decision-making.

b) The Annual Plan

All local authorities must prepare an Annual Plan. The Annual plan will link the Mid-to-Long Term Strategic Plan to the annual budgeting process.

The Annual plan must include:

1. Proposed annual budget including estimated costs and revenues;

2. Funding impact statement for the year;

3. Annual financial statements forecast;

4. Statements setting out levels of service and performance measures;

5. Details of any changes of the information in the Mid-to-Long Term Plan, including the reasons for change.

The plan will provide detailed information about the local government's investment in tourism-related activities, levels of service and performance measures.

c) The Annual Report

This report focuses on the reporting about the progress of the community against the community outcomes rather than against the financial results.

The Annual report must include:

- The results of the monitoring process over the community outcomes undertaken throughout the year;

- Any identified effects of the activities;

- Details about the financial and non-financial performance of the local authority;

- Reports on any significant acquisitions, replacements or disposal of assets;

- Reports on the performance of Local Government Controlled Agencies and Organisations

F.3 Monitoring / Re-measure after a specific time period

One must make sure that the indicators and the collected data are subject of review on regular basis and new indicators are included whenever possible.

The range of indicators may be expanded that helps the creation of more complete picture about the destination. Due consideration should be also given to the question whether funding could be obtained to support the long-term maintenance of the system and cover the cost of improvements, data collection and other work related matters. It is also useful to discuss and gain agreement about the ways of communicating the results and eventual success stories to the wider groups of stakeholders, the local community and other organizations and people outside the destination. Information should be also included in the marketing tools and communication means.

Once the use of the System in the destination is under way and the collected data for indicators become more extensive, the next useful step is to start making comparison of the destination's progress against international benchmarks.

Some examples of international benchmarks are provided in the detailed indicator sheets which can be found at http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/indexen.htm (documents available in English). Thus, achievements will be placed in a bigger context and shareholders will be motivated for taking further action towards improved results. The idea behind this matter is not to create competition among destinations, but to recognize that all results generated throughout the process are central to the decision making plans for the destination.

The implementation of a tourism strategy or making informed decisions about local government involvement in major tourism projects and events, require that the right information and decision criteria are taken into consideration.

The Implementation section builds on the vision and objectives developed in the Strategic Planning section. It includes the following Toolboxes, which provide the framework and resources to assist the local authority decision-making:

 ⬊ Tourism Partnerships Toolbox;

 ⬊ Project Design, Appraisal and Development Toolbox;

 ⬊ Tourism Project Evaluation Toolbox;

 ⬊ Event Development, Funding and Evaluation Toolbox.

This section focuses on the information required for decision-making about destination management issues.

G.1 Tourism partnership toolbox

The Toolbox covers the use of partnerships as destination management tool for tourism related issues which are beyond the capacity of one organisation or area to address. The Toolbox provides information on establishing tourism partnerships, the likely stakeholders and factors that influence the success of partnerships.

It identifies how local governments can use partnerships to manage tourism related issues that are beyond the capacity of one organisation, including:

 ⬊ Resolving issues common to a number of local authorities in the same region – such as provision of amenities and infrastructure to meet visitor needs on a highway traversing a number of local government boundaries, or freedom camping for campervans;

 ⬊ Developing a regional approach to identify the visitor attraction needs;

 ⬊ Marketing a region that comprises a number of smaller visitor destinations.

The benefits associated with tourism-related partnerships include:

 ⬊ Encouraging the cooperation and coordination with key stakeholders;

 ⬊ Partnership work towards shared strategic objectives;

 ⬊ Reduction of costs for the same level of services;

 ⬊ Shared and more effective research.

Toolbox is included in the Annex: Toolboxes / Tourism Partnership Toolbox

G
Implementation

G.2 Project design, appraisal and development toolbox

Local governments have critical role in shaping the way a particular project would contribute to or detract from the overall quality of a destination. A responsible local government would undertake an independent design appraisal of every proposed major project, regardless if public or private, and would make a creative engagement with the developer to ensure that it brings added value to the overall destination.

This Toolbox outlines the basic steps of project design appraisal and provides resources for making successful appraisals. A successful project design appraisal will bring benefits for developers, operators, host community, visitors, as well as for the local authorities.

A robust appraisal which is undertaken in the early stages reduces the possibility for emerging problems (such as litigation or redesign) later in the development process as well as:

↘ Creates a positive environment for collaboration;

↘ Helps the identification of opportunities for synergy between previously unrelated projects (e.g. road improvement and site development);

↘ Promotes greater integration between different attractions within a destination (e.g. improved access);

↘ Strengthens the distinctive identity and character of a destination (e.g. through selection of appropriate design styles, materials, etc.).

Toolbox is included in the Annex: Toolboxes / Project design, appraisal and development Toolbox

G.3 Tourism project evaluation toolbox

In order to ensure the maximum benefits for the community, local governments should dispose of good systems for assessment of commercial tourism projects proposed by developers. This Toolbox provides guidance about key areas that should be assessed and questions that local authority should ask as part of its evaluation. The Toolbox should be also shared with the potential tourism developers so that they can prepare the essential information which is necessary to obtain support from the local authorities.

The systematic approach to project evaluation brings a number of benefits for local governments, such as:

↘ Avoiding waste of resources on projects that do not meet the economic and social objectives of a local government;

↘ Investments are targeted to potentially successful projects, thus limiting the government's exposure to risk;

↘ Local governments retain their credibility within the community by implementing a robust evaluation methodology;

↘ Decision-making is based on sound information rather than emotional commitment;

↘ Transparent and fair process for the developers.

Toolbox is included in the Annex: Toolboxes / Tourism project evaluation Toolbox

G.4 Event development, funding and evaluation toolbox

Local governments are often actively involved in developing the concept about events, as well as the management and funding of events. Events can be used as a specific marketing tool to promote the awareness of a destination. Any successful event further generates significant economic benefits.

This Toolbox outlines how to arrange the development, management and funding of successful events. It provides resources for local governments to prepare event development, management and funding policies, as well as evaluate the economic impact of events.

The potential benefits for local governments from this Toolbox include:

- Development of events policy, including a strategic approach to the funding of events;

- Development and funding of events that meet economic and social objectives for certain;

- Effective use of public funds;

- Avoid wasting the time of the government by taking into consideration only events that meet agreed criteria;

- Focus on complementary, not competing events.

Toolbox is included in the Annex: Toolboxes / Event development, funding and evaluation toolbox

G.5 Smart decisions toolbox

The implementation of the STPT requires the ability to make effective decisions, design comprehensible decision processes and understand and manage risks, especially given that tourism is an area which is both a multi-actor and multi-sector policy field.

More than 25 years of applications in decision and risk analysis have shown that building up decision capability enables:

- Establishment of priorities in policy programs and making more effective use of resources,

- effective management of risk and uncertainty,

- tackling the conflicting objectives,

- gaining commitment for effective implementation of decisions by systematic inclusion of stakeholders in the decision-making processes, and

- communicating more effectively with the public about decisions and risks.

That would require resources that may help the decision-making process in areas as diverse as:

- allocation of scarce program budgets through different investment options;

- making trade-offs between economic, ecologic and social objectives;

- transparent selection of contractors in public tenders;

- development of recommendations for setting decisions;

- communicating social or environmental risks to the public.

Toolbox is included in the Annex: Toolboxes / Smart decision Toolbox

H

Marketing and Positioning

Eventually, collected data can help the creation of story about the destination which is further integrated in the marketing and communication plans and will inform the long-term strategy and policy.

Then, the destination may start to consider different types of tourists who will be encouraged to visit and the different ways in which the destination could be presented to potential visitors. Thus, the economic benefit can be maximized as result of better management and more sustaina ble destination.

The scope of marketing planning depends on the development scale of tourism.

Destinations with developed marketing plan for tourism adopt the strategy according to the outcomes of the evaluation and use benchmarking for positioning on regional and global markets.

Destinations without developed marketing plan can use the marketing planning toolbox and use the evaluation outcomes for positioning.

Marketing planning should include information for the prospective tourists about the offers they can get in the area, which will be an attempt to convince them to visit the area. It should therefore be understood as part of the overall tourism planning process. This would involve several activities – establishing the marketing objectives, formulating the marketing strategy and product development, preparing and implementing the promotion programme, and monitoring its implementation.

The measured results from the evaluation process, in fact, provide possibilities for benchmarking. GSTR verification can also provide visibility on global markets since the results are included in the marketing action of Green Destinations.

H.1 Sustainable Marketing strategy / guidelines

Marketing planning should include information for the prospective tourists about the offers they can get in the area, which will be an attempt to convince them to visit the area. It should therefore be understood as part of the overall tourism planning process. This would involve several activities – establishing the marketing objectives, formulating the marketing strategy and product development, preparing and implementing the promotion programme, and monitoring its implementation.

a) Tourism Marketing Objectives

The marketing objectives refer to the market targets about the types and numbers of tourists to be attracted. Market targets are set by taking into account the markets which are likely to be attracted if development and marketing plans are properly implemented.

The targets are expressed in terms of the approximate numbers of tourist arrivals by type, average length of stay, countries or country regions of origin, and other characteristics. "Clusters" of tourist groups should be closely related to the desired tourism product.

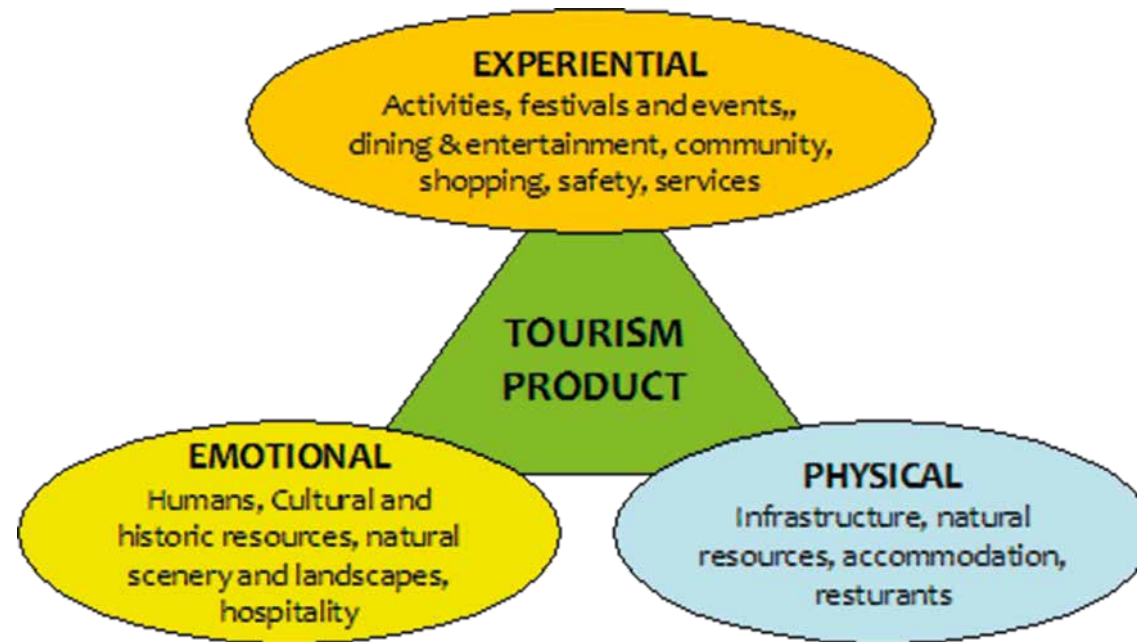### b) Tourism Marketing Strategy and Product Development

The marketing strategy sets forth the most effective approach to be applied in order to achieve the marketing objectives. It should include the following:

➘ Whether marketing will be general, aimed at tourists of general interest, or selective and

directed towards specific tourist markets, with special focus on those making a more positive impact on stakeholders (including other visitors);

⬎ The types of promotional techniques to be used and which should be the targets – tour operators, tourist consumers or a combination of both;

⬎ The timing or priority scheduling of promotional efforts for certain types of markets or countries. Timing may depend on the schedule of tourism development projects;

⬎ The image and reality of the destination to be conveyed. A newly developed destination should first create a desirable image of itself before it undertakes a specific promotion;

⬎ Any particular obstacles to be overcome, such as recent political instability or a natural disaster.

The marketing strategy should be linked with both the long and short term objectives, while the review of the marketing strategy should be at fairly frequent intervals. The marketing strategy can also undergo certain modifications, if necessary, depending on the market trends and any changes in the development of the tourism product.

One crucial aspect of the tourist marketing strategy is that it relates to the product development, and this may include the development of a new tourist product or redesign of existing one. This endeavour must take into account the branding and must be consumer oriented. Each of the tourism products depend on three factors, related to the physical, emotional and experiential realm.

The Three Components of the Tourist Product

Visitors will expect certain things regarding each classification of tourism products (natural parks, historic and cultural attractions, wine & food, events, etc.). Local government and the private sector must work together to ensure that these tourism products fulfil or surpass consumer expectations, considering that expectations are also formed through comparisons with competitor's products.

This model of product development suggests the following actions:

⬎ Research should be undertaken to spot gaps and trends in the market, where new and exciting products would find a profitable audience;

↘ The formulation of new products should originate from such research - specifically visitor satisfaction surveys and competitor analysis - aimed to individuate new and unique tourism products related to niche markets.

↘ Existing tourism products that promote unique experiences and create greater cultural bonds (such as community-based or cultural tourism products) should be also encouraged and promoted;

↘ Education must be provided to the local tourism industry about product development and specific strategic direction and branding values that the local tourism department would like to promote, along with SMEs and communities which are encouraged to produce such products.

↘ Tourism infrastructure, such as accommodation and transport facilities must be measured against this full tourism product definition.

↘ Monitoring measures should be put in place to ensure that this quality and spirit is upheld into the future.

Product development should be also implemented keeping in mind that visitor experience is probably the most important factor in tourism branding. This is made up of impressions along every step of the journey – from arrival all the way through to departure. This means that every aspect of the visitor experience should be monitored to ensure an acceptable level of service delivery and quality.

Depending on the tourist target established by the marketing strategy, stakeholders should adhere to the guidelines and values, thereby ensuring that this quality might be provided by the local government. Service delivery and quality delivery should then be measured in terms of these guidelines and values, as well as through visitor surveys.

Guidelines should be formed around the kind of feelings that the government wants to leave visitors with, including elements such as a safe and secure visit; good treatment with a warm hospitality; fair treatment, with special regard to purchases; high level of service, making visitors feel special through exceptional service delivery and professionalism.

c) Preparation and Implementation of the Promotion Programme

The promotion programme implies taking into considerations several aspects: marketing strategy; knowledge of marketing distribution channels; availability of promotion techniques; amount of available budget.

There are two basic ways to channel marketing promotion efforts, i.e. direct and indirect:

↘ Direct efforts are usually made when the market is mature and has some experience of the destination;

↘ Indirect marketing is used in markets where none or little knowledge exists concerning the product.

Toolbox is included in the Annex: Toolboxes / Marketing Toolbox

H.2 Positioning on local, regional, European, global market

REGIONAL POSITIONING

NALAS as body that represents the local authorities of SEE will include information about evaluated destinations in its dissemination activities, thus ensuring exposure to the regional market. NALAS will encourage national authorities to promote the achievements of evaluated destinations.

EUROPEAN POSITIONING

Currently, the ETIS indicator system is still in the test phase. Once the test phase is completed, the European Commission will offer data for benchmarking of participating destinations. This shall bring additional benefit for destinations that use the Green Destination of SEE toolkit for benchmarking with similar European destinations. In addition, the European Commission will publish the results so that the participating destinations will be additionally exposed on the European market.

GLOBAL POSITINONING

Global recognition and visibility can be best achieved with the use of GSTR evaluation tool.

It is important both for the tourism industry and the consumers to determine the extent to which tourist destinations meet the sustainability criteria. The only tool that offers understanding about sustainable performance to the consumers is the GSTR tool which is translating information into relevant benefits for consumers. See descriptions on Booking.com affiliate BookDifferent (www.bookdifferent.com) which inte-

grated the GSTR results into presentation of destinations. This provides global exposure and direct connection to booking platforms.

GSTR can be seen as the first step to inform tour operators and holidaymakers with "visible and noticeable quality and sustainability of holiday destinations". Given the research carried out by GSTR, it appears that these achievements are generally low and few destinations have a tourism policy that is based on the principles of sustainable development.

It is important that GSTR further develops as a neutral tool, and becomes a suitable independent platform for various award and certification programs as well as neutral source of information for OTAs that do not want to choose a particular eco-label.

Destinations evaluated through GSTR evaluation toolkit can compete with global and European destination through the TOP 100 Sustainable Destination award.

SUSTAINABLE DESTINATIONS GLOBAL TOP 100

In 2014, Sustainable Destinations Global Top 100 was created to celebrate the management efforts of hundred most sustainable destinations on Earth. The Top 100 is the result of open calls in the social media followed by a selection process involving 30 international sustainable tourism experts. The Sustainable Destinations Global Top 100 is an initiative of TravelMole.com, VISION on Sustainable Tourism, Totem Tourism, and Green Destinations. Green Destinations took full responsibility for the selection process.

The implications of the GSTR verification for the Top 100 GSTR destination scores are as follows:

➥ Without verification process, GSTR destination scores cannot be higher than 6/10.

➥ Through a verification process, GSTR destination scores can increase up to 8/10.

➥ GSTR Scores higher than 8/10 are only possible through appropriate destination certification.

The ranking among the TOP 100 Sustainable Destinations means extensive media exposure of all participating destinations. GSTR offers relevant data about sustainability performance of destinations and brings visible global exposure and positioning on global markets.

↘ Sustainable Tourism Planning Toolkit for the Local Governments of South East Europe – STPT "See Tourism Goes Local"

↘ European Tourism Indicator System for Sustainable Management at Destination Level - ETIS

↘ Global Sustainable Tourism Review - GSTR

Jana Apih s.p. in cooperation with Institute Factory of Sustainable Tourism – GoodPlace, Slovenia

Sources

J

Annex

J.1 Annex: Toolboxes

1. NATURAL ASSEST TOOLBOX

Check which strategies are in place in the destination. The toolbox can be used for further decision making about the strategies that need to be put in place and the actions that need to be carried out.

Stand-Alone Mixed Strategy Checklist

Stand-alone mixed-strategy checklist

This is a more hybrid approach, recognising that municipalities may adopt a limited portfolio for particular natural assets, but with the safeguard of action-guiding checks and balances. A mixed strategy checklist is therefore provided so that it serves as a guide in deciding about the best course of action depending on specific natural assets in the destination.

Information	Yes	No	Unclear	Option for action
History of visitor impact management already exists				Review existing arrangements Resource consent conditions Stand-alone management plan written
National significance				Central government agencies notified
Regional significance				Regional authorities notified
Local significance				Co-ordination of departments / units within the local government Relevant local organisations involved Stand-alone management plan written
Involves passive consumption				Minimal impact guidelines produced and distributed
Involves active consumption (High active recreation component)				Significant impact guidelines produced and distributed
Organised group visits				Producer/operator guidelines produced and distributed
Informal group visits				Consumer/user guidelines produced and distributed
Individuals visits				
Similar type of assets already managed by Regional & National Governments				Adapt Regional and National methodology
Built structures, engineering, track, road works requiring resource consent				Volume of visits, types of structures, materials specified to meet impact minimisation targets
Other plans apply: Regional Plans, Coastal Policy Statements, National Policy Statements				Restrictions /penalties /guidelines
Monitoring capacity of the local government exists				Relevant section within Local government identified and programme prepared
Owner monitoring capacity exists				Programme prepared with Local government assistance where appropriate
Third party (e.g. NGO, community member) monitoring capacity				
Local Government education capacity				Advanced visitor guidelines produced with Local Government where appropriate
Owner education capacity				

2. PUBLIC SECTOR INFRASTRUCTURE TOOLBOX

In this Toolbox, there are a number of resources that local governments can use to collect data and provide a better understanding of public sector infrastructure, including:

a) Potable water supply and consumption data;

b) Wastewater services and production data;

c) Solid waste services;

d) Data collection;

e) Snapshot studies;

f) Private sector infrastructure.

a) Potable Water Supply and Consumption Data

There are two ways of obtaining data on water consumption by visitors. These are:

⬊ Using typical consumption data;

⬊ Field data gathering.

Typical data usually better fit the low-cost desktop studies, providing an approximate quantitative picture about the demand from the water-supply services in the town due to tourism.

The limitations of this type of analysis are the following:

⬊ Water consumption per guest/night (litres – L/GN) varies depending on the accommodation type, business type and external water demands (e.g. garden irrigation);

⬊ Peak demand periods are poorly quantified;

⬊ The analysis does not provide sufficient data to enable modelling and improved cost allocation and charging structures.

b) Wastewater Services and Production Data

There are two ways of obtaining data on wastewater production by visitors. These are:

⬊ Using typical wastewater production data;

⬊ Field data gathering.

As with the water usage, typical wastewater data should only be used for a low-cost desktop study, and the limitations of this type of analysis are the same as for water usage.

c) Solid Waste Services

Usually, there is a lack of good information and data on the demand tourism places on a local authority's solid waste service, since it is very difficult to obtain both typical data and field data on solid waste production from different visitor activities. This is for the reason that there are many different solid waste streams and different ways of management.

The waste streams management may consist of some or all of the following:

⬊ Street collection of household garbage;

⬊ Street collection of recyclables;

⬊ Street bin rubbish;

⬊ Community recycling stations;

⬊ Commercial and industrial (tourism and non-tourism) waste;

⊿ Commercial and industrial (tourism and non-tourism) recyclables;

⊿ Private collection and transport of garbage, green waste and recyclables to landfills, transfer stations or recycling centres.

d) Data Collection

The quality of required data depends on the nature of the conducted study. There are two types of studies:

⊿ A low-cost desktop scoping study that evaluates the overall demand that tourism industry exerts on the water, wastewater and waste service in the town;

⊿ A comprehensive study involving more detailed data collection and evaluation of the impact of tourism on the water, wastewater and waste services.

Desktop Scoping Study

As stated above, this is a low-cost desktop study that allows for creation of an approximate quantitative picture about the relative demand that tourism places on the town's services.

Data required:

⊿ Data about guests/nights in the town from available sources on monthly basis;

⊿ Permanent resident population;

⊿ Monthly data about water consumption and wastewater production data in the town for a 12 month period.

Comprehensive Study

Given the results of the scoping study, it may be decided that a detailed study is needed to assist the local government in designing an improved cost allocation and charging structure. Snapshot study is one of the techniques that can be used for collecting micro data.

e) Snapshot Studies

Obtaining real micro data for visitor demand from the town's infrastructure such as water consumption, wastewater and solid waste production can be difficult and costly, mainly for two reasons:

⊿ The demand is seasonal and depends on the nature of the visitor activities, such as the type of accommodation used.

⊿ Certain services are shared between visitors and permanent residents; for example restaurants, cafés and visitor attractions.

In such circumstances, the identification and quantification of the demand in the sector can be complicated. Therefore, snapshot studies can be used to provide representative data on micro level.

g) Private Sector Infrastructure

Infrastructure is provided by both the local authorities and the private sector. Although this toolkit focuses on the public sector rather than the private sector infrastructure, yet, it is recognised that there is increasing interest in infrastructure services provided by public-private partnerships (PPPs).

Visitor-related private sector infrastructure normally includes:

⊿ Accommodation;

⊿ Energy supply;

⊿ Public transport (bus, rentals, rail, air, sea);

⊿ Communication, including telecommunication, internet services;

⊿ Entertainment, food and beverages, shopping and other visitor business activities.

3. VISITOR DEMAND TOOLBOX

The table helps to identify the required specific information about the visitors of the destination. The checklist must be completed by ticking the appropriate boxes to confirm which information is available/unavailable, and partially available or unsure if available.

The table suggests how to obtain data on the use of accommodation in a destination. It can be also useful to obtain data in places with many accommodation providers which are not included in commercial databases because of their limited revenues or since they are not tourism enterprises (e.g. B&B operators).

Checklist. Visitor Characteristics and Behaviour Information

Information	Yes	No	Unsure or Partially
Trend in visitor arrivals (international) and domestic tourism			
The number of international and domestic visitors to the destination			
The international visitors' country of origin			
The regions in the country that domestic visitors come from			
The reason for visiting the area			
The transport used to reach the area			
The type of accommodation they use			
The attractions visited and activities undertaken by visitors in the area			
Duration of their stay in the area			
The number of day trips to the area (as distinct from those who stay overnight)			
Seasonality visitor profile for the area			
International and domestic visitor forecast for the area			

Method for Developing Visitor Profile for Smaller Local Governments

Information	Method	Benefits
Accommodation data	Develop a monthly survey for accommodation operators in the area to include: ↘ Number of rooms ↘ % of rooms sold per month ↘ Origin of visitors ↘ Length of stay	↘ Provides baseline data about visitors which will further indicate trends, peaks and troughs in the course of time ↘ Provides feedback to operators which they can use to benchmark their position ↘ Assists in marketing the area to specific visitor/market types

4. VISITOR SATISFACTION TOOLBOX

The table provides a checklist on visitor satisfaction information requirements. Once completed, it helps to identify the available information about visitor satisfaction with available services in the destination.

Checklist. Visitor Characteristics and Behaviour Information

Information	Yes	No	Unsure or Partially
Quality, range, and value for money of accommodation			
Ease and cost of parking in the area			
Range/choice, quality of visitor attractions and activities to do			
Range/choice, quality of service, value for money of places to eat and drink			
Range/choice, quality of the shopping environment, value for money			
Ease of finding the way around: road signs, pedestrian signs, display maps and information boards			
Availability and cleanliness of public toilets			
Street cleanliness			
Upkeep of parks and open spaces			
Range and quality of evening entertainment			
Overall impression of the city/town			
Popularity of attractions			
Feeling of safety in terms of crime and traffic			
Ease of finding, quality of service, usefulness of information received from the site/information centre			
What is the city/town most liked about			
Things that spoilt the visit			
Likelihood of recommending the city/town to others			
Improvements one would like to see			

5. COMMUNITY TOURISM TOOLBOX

The tables below give an overview of main benefits and challenges from tourism.

Benefits from tourism to local communities

Economic	Socio-cultural	Environment
Protects and provides a source of income for natural and built heritage		
Enhances the image of an area and also attracts commercial investment outside the tourism industry by demonstrating it to the potential investors as good location		
Acts as catalyst for economic growth and employment Increases demand for other non tourism businesses	Leads to the creation and maintenance of local amenities	Draws attention to the need for protection of the natural environment and encourages a more rigorous analysis about the importance of the local eco-system
Supports and helps to maintain local services, such as shops and restaurants		
Provides re-skilling, training and employment opportunities		
Provides supplementary income to people looking for second job, part time work and unsocial hours payments		
Encourages residents to stay and spend leisure time		
Encourages upgrading and re-use of derelict land and buildings		
Brings expenditures from external sources into the local market	Supports a programme of events, arts, sports and other culture	
	Helps to build distinctive communities, thus	
	Promotes local pride and self confidence	
	Provides opportunities for social inclusion	

Challenges from tourism to local communities

Economic	Socio-cultural	Environment
Tourism is a diverse sector and therefore the co-ordination is complex and ongoing		
Tourism spending is dependent on economic, social and other factors (such as political events, exchange rate, etc.)		Places strain on transport infrastructure, particularly roads and parking, and other infrastructure, like sewerage and water
Economic downturns in source countries can lead to a reduced visitor impact on local businesses in the short or long term depending on the severity of the downturn	Can be unattractive for people entering the labour market because of unsocial hours, seasonal/part time work	Can place additional pressure on sensitive local environments and therefore needs effective visitor management
Demand can be seasonal and variable over a weekly cycle, which in particular has impact on the employment		
Requires all weather facilities and activities		
Is very competitive and increasingly sophisticated		
Requires ongoing investment from local government		

The checklist below helps to identify whether all the required information about the community's attitudes to tourism is available. The other part of this Toolbox helps to address any of the identified information gaps.

Checklist. Community Attitudes to Tourism

Information	Yes	No	Unsure or Partially
Community awareness of the economic benefits from tourism			
The impact of tourism on the social structure of communities			
Community views regarding the potential negative impact of tourism on the environment			
Community consulted regarding tourism developments and investments			

Details about the range of issues that these groups and individuals might cover are provided in the table.

Potential Community Tourism Issues

Community Interest	Key Issues
Elected representatives	↘ Views and opinions of constituents ↘ Issues related to public spending
Community groups	Mainly local issues – parking, congestion, developments, provision of services
Interest groups	Specific issues related to areas of interest – access to recreational areas, retention of heritage buildings, environment
Industry	↘ Profitability of business ↘ Issues related to planning and development ↘ Accessible and trained labour force
Individuals	Issues related to individual circumstances – parking, congestion

The table lists the range of consultation techniques that may be appropriate to address different types of issues.

Potential Community Tourism Issues

Techniques	Appropriate Issues
Telephone survey	↘ Focus on quantitative information from a large cross section of the community ↘ Broad based issues (e.g. support for new convention centre)
Postal survey	Similar to telephone survey, but with ability to include more detailed qualitative and quantitative responses
Focus groups	6-12 people to discuss specific issues to seek a solution (e.g. options for improving traffic congestion)
Workshops	Similar to focus groups, but generally include more people, working in small groups (e.g. strategic plan development)
Public meetings	Often used to introduce and/or report back on issues to a larger group of people, limited participation by attendees (e.g. report back on information obtained from telephone or postal survey)
Exhibition	↘ Used to provide information to interested people before the decision making process is completed. ↘ Generally includes extensive visual material (e.g. concept plans for a new museum)
Tourism advisory board	Stakeholder group to manage the consultation and strategic plan development process

6. TOURISM INDUSTRY INVENTORY TOOLBOX

The checklists enable to complete a tourism product inventory for the destination.

Checklist. Attractions Inventory

Type of Attractions	No of businesses
Amusement/theme parks/entertainment complex	
Art galleries	
Archaeological and historic buildings/sites	
Industry (brewery, winery)	
Folkloristic cultural experience	
Museums	
Natural (glacier, caves, rivers, lakes mountains)	
Nature (zoos/wildlife/aquaria)	
Religious centres	
Rural (agro-tourism, wine & food producers),	
Spas	
Transport (train, boat trips, plane trips)	
Other	
Total	

Checklist. Activities Inventory

Type of Attractions	No of businesses
Adventures and outdoor pursuits	
Jet boating	
Boating – other	
Bungee jumping	
Canoeing, kayaking	
Caving	
City tours	
Climbing and mountaineering	
Cooking courses	
Cycling/mountain biking	
Diving	
Eco tours	
Fishing	
Gliding	
Golf courses	
Horse trekking	
Hunting and shooting	
Paragliding, hang gliding, parasailing	
Rafting and river surfing	
Skiing and snow sports	
Tramping, trekking, hiking, walking	
Wine tasting	
Other	
Total	

Checklist. Accommodation Inventory

Type of Attractions	No of Properties	No of Rooms/sites	No of Beds	Avg No of Rooms
Hotel				
Motel				
Backpacker/hostel				
Farm stay/home stay/B&B				
Caravan/camping sites				
Student accommodation				
Luxury lodge				
Rented accommodation				
Shared flat				
National Park/DoC hut				
Time share/apartment				
Free camping/ campervan				
Total				

Checklist. Transport Inventory (including public transportation)

Type of Attractions	No of businesses
Campervan and motor home rentals	
Bus charter companies	
Limousine and chauffeur services/tours	
Rental cars and vans	
Trains	
Launch and sailing charter and cruises	
Ferry and water taxi services	
Coach tour operators	
Air transport	
Other	
Total	

7. ECONOMIC IMPACT TOOLBOX

Once completed, the checklist about the economic contribution from tourism can verify the already available information, but also indentify further needs and uncertainties. The other part of the Toolbox will help to fill in any information gaps.

Economic Contribution of Tourism

Information	Yes	No	Unsure or Partially
How many visitors come to the area?			
How much do visitors spend in the area and on what?			
How many tourism businesses are there in the area?			
How many people are employed directly in different types of tourism businesses?			
How do other businesses and residents benefit from tourism expenditure?			
How much of the money spent by visitors stays in the area?			
Local, regional and national tourism trends/performance			

8. STRATEGIC PLANNING TOOLBOX

Example of PEST Analysis for a tourist destination

Political and Legal factors	Economic factors
�devit How stable is the political environment? ⬐ How will government policy influence laws or how will tax on business affect spending within the tourism industry? ⬐ Is the government involved in international agreements (e.g. for visas)? ⬐ How do government employment legislation and policies affect the tourism industry? ⬐ How do tax policies affect tourism industry spending and development?	⬐ Which area the trends and forecasts about interest and exchange rates with key origin countries? ⬐ Which is the current and projected economic growth in origin countries? ⬐ How expensive is the destination vs. competitor area? ⬐ What is the rate of business investment into the tourism industry? Can this be better directed/increased/aided by the local government?
Socio-Cultural factors	**Technological factors**
⬐ Which is the attitude of the community to the foreigners? ⬐ What is the opinion of foreigners about the destination? ⬐ How does language impact the visitor experience? ⬐ Do visitors have a strong/weak opinion about green issues?	⬐ Do technologies offer more innovative products and services to consumers and businesses? ⬐ How is distribution changed by new technologies? ⬐ Does technology offer new ways to communicate with visitors and other stakeholders? ⬐ Are there any innovative technologies which can improve the destination's offers (e.g. virtual reality applied to cultural visits)?

Example of SWOT Analysis for a tourist destination

Strengths	Weaknesses
↘ A foreign-language literacy among the work force ↘ Presence of strong incoming operators, well rooted into international distribution channels ↘ A distinctive destination with peculiar natural and cultural resource ↘ A strong branded destination	↘ Poor transport connections to the destination ↘ Difficulty for predominant family-run business to keep-up with technological changes ↘ Poor quality records in most accommodation facilities ↘ Increasing pollution of sea water
Opportunities	**Threats**
↘ Steady growth of international tourism demand ↘ Increasing tourism demand for peculiar destination resources (e.g. eno-gastronomy) ↘ Availability of financial resources from EU structural funds for tourism investments ↘ Availability of dismissed railroads that might be converted in cycle paths	↘ Increasing crime rates ↘ Emergence of nearby competitive destinations ↘ Increasing national taxation on the tourism industry ↘ Construction of a nearby industrial district that might affect the destination landscape

Example of tourism goals for the four "VICE" areas

Area	Tourism Goal
Visitors	↘ Increase the number of visitors to the destination ↘ Enhance the level of visitor satisfaction with the region
Industry	Encourage closer relations between the public and private sectors of the tourism industry
Community	Increase the support for tourism in the region from the local community
Environment	Maintain the quality of the environment

Example of tourism objectives for the four "VICE" areas

Area	Tourism Goal
Visitors	↘ At least 80% of all visitors to the destination will recommend it to other visitors as a "must see" destination ↘ 95% of all visitors to the destination regard it as a safe place to visit
Industry	75% of tourism operators recognise the destination as a user friendly place to initiate, develop and operate tourism businesses
Community	At least 80% of residents are very supportive of the destination' initiatives for growth management in the tourism industry
Environment	75% of stakeholders (visitors, industry and communities) are supportive of how the destination manages and reports on the environmental impact of tourism

Example of tourism strategies for the four "VICE" areas

Area	Tourism Goal
Visitors	Conduct a visitor satisfaction survey to better understand the needs of visitors to the destination
Industry	Convene monthly meetings for operators and public officials to improve understanding of each other's needs
Community	Undertake an annual survey of residents to gauge their support for public investment in tourism infrastructure
Environment	Monitor the use of sensitive environmental areas by visitors

9. TOURISM PARTNERSHIP TOOLBOX

This Toolbox provides information about setting up tourism partnerships, and the stakeholders and factors which are likely to influence the success of partnerships. The Toolbox builds on information from previous sections regarding the work with the tourism industry.

a) The Key Stages in Developing a Successful Partnership

- Identify participants, send invitations and make agreement about shared overall objectives;

- Devise a strategy and action plan;

- Obtain resources;

- Manage the delivery of the action plan;

- Monitor the developments and provide results to stakeholders;

- Keep the partnership alive.

b) The Stakeholders

In most cases, stakeholders should represent the visitors, industry, community and environment, although not all of them need to be involved in every partnership. Representation is conditioned by the respective needs:

- Visitors are unlikely to be personally represented, but their views can be obtained through surveys and user group representatives (e.g. tour companies).

- Industry can be represented by major operators, industry organisation representatives and existing business forums.

- Community can be represented by elected members, community groups and interest groups.

- Environment can be represented by the Ministry and Department concerned with environment and conservation, and other environment agencies.

c) Factors that Determine Success or Failure of Partnerships

International research has identified the following factors as key to the success of tourism partnerships:

- Early involvement. All stakeholders (VICE) must be involved in the early stages of the process, since it would be ineffective and time-consuming to introduce a group later. As far as large partnerships are concerned, it may be necessary to gather smaller, like-minded groups, prior to bringing everyone together, so that each group can feel its relevance (e.g. attraction operators may initially meet separately from transport operators);

- Openness and honesty. Partnership should be used to identify and develop the ideas of other stakeholders, which means that governments' ideas are not the only ones imposed;

- Long term commitment. The time and resource requirements should be realistically presented in order to avoid being over-ambitious about the number of established groups;

- Extended timescale. It takes longer to reach decisions when working in a partnership, and therefore an extended timescale should be allowed;

- Communication. The work and success of the partnership should be communicated regularly and effectively both to partnership members and externally;

- Management of partnership. The partnership should be kept alive by investing time and effort into its management, maintaining activity, and demonstrating and reporting progress.

10. PROJECT DESIGN, APPRAISAL AND DEVELOPMENT TOOLBOX

There are two related procedures which are combined in a project design appraisal:

↘ Assessment of environmental effects,

↘ Project scoping.

a) Assessment of Environmental Effects (AEE)

AEE analyses the ways in which a proposed project is likely to change the environment given the project location. It is a systematic process, with well documented basic procedures. AEE should cover all the environmental dimensions of a project, including effects on the soil, water, land, and other physical resources.

Landscape Assessment is an integral part of an AEE for a tourism project, and focuses on two types of effect - the specific visual and sensory effects of the project (what it looks like, etc), and the effect these changes have upon the character and identity of the overall landscape setting. It is particularly important to undertake a robust evaluation of the wider cumulative landscape effects of a project.

An AEE process will also include the identification of how the effects of a project can be avoided, remedied or mitigated. The objective is to minimise the net effect on the environment. This may include redesign of parts of the project to avoid adverse effects, for example by relocating an access road to preserve a wetland; actions to remedy a potential effect, such as revegetation of disturbed land to prevent erosion; or actions to mitigate effects that cannot be entirely avoided, such as the revegetation of an area of degraded land to compensate for unavoidable visual effects.

The use of environmental compensation is highly contentious, as it involves balancing different aspects of "sustainable management". In an AEE of a tourism project, it is important to assess the effects of change and any proposed environmental compensation upon both the host community and the visitors. Satisfactory resolution of trade-offs requires appropriate experience and expertise that is frequently not available to small local authorities. It may therefore be necessary to employ a consultant.

The problems of evaluating environmental compensation highlight another contentious aspect of tourism development, which is the cumulative effect of a succession of projects. Whilst individually modest in scale, the aggregation of effects can cause significant changes in overall landscape character.

Cumulative effects demonstrate one of the limitations of an approach based primarily upon AEE. Whilst it may be feasible to avoid, remedy or mitigate the effects of a single small project within a wider landscape, it is impossible to repeat this over and over again for a succession of projects. It is inevitable that the overall character of the setting will change. One of the dangers of an incremental use of AEE without a strategic planning framework is that it becomes harder to take effective mitigating actions, as the whole setting may be steadily degrading. Ideally, a robust strategic plan will help to address this risk, but even then, a total focus on reducing effects can become unhelpful. This is where more creative thinking is required in the appraisal process.

b) Project Scoping

Project scoping is normally undertaken by a developer as part of the project implementation process, but it is also relevant for a local government in implementing a tourism strategy. Whilst a developer will be focused entirely upon shaping a project to meet their own needs, a local government will be interested in the connections between a project and its setting.

Here the focus is upon the landscape dimensions, but the local government might also address functional connections such as car parking or water demand in the same way.

The key feature of a "landscape" approach to project implementation is that it looks across land titles and boundaries. Project scoping involves:

⬊ An assessment of the basic project requirements;

⬊ Analysis of potentials and limitations (e.g. site analysis);

⬊ Identification of design opportunities.

It is the identification of design opportunities that offers greatest potential for creative collaboration. Local governments will have their own capital investment and asset management plans, which may include projects that could complement the developers' proposals. A common example of this type of synergy is that of rural villages programmes that have been implemented throughout Europe under the rural development programmes, in which local governments invest in public infrastructure in partnership with businesses and land owners upgrading their land and buildings. In other cases, the opportunity may lie in getting two developers to collaborate.

In most cases, a creative engagement between a local authority and developer can identify win-win outcomes. If the project is large enough, it may provide a stimulus for regeneration of a neighbourhood, acting as an anchor for other public and private investment. Involvement of the local government can also improve the chances of attracting other forms of support (such as from central government agencies).

In order to realise these types of outcomes, it is essential for the local government to nominate a well qualified and experienced coordinator, who can work with the developer and their consultants on an equal footing. This may be an existing planner or designer within the administration, or for a major project it could be efficient to engage an external consultant. The overall aim is to identify ways in which a developer's initiative can add value to, and receive benefit from, the landscape setting for which it is proposed.

11. TOURISM PROJECT EVALUATION TOOLBOX

The completion of the project evaluation checklist helps to identify the existing government's approach to project evaluation, and to ascertain where more information is needed.

Checklist. Project Evaluation

Information	Yes	No	Unsure or Partially
Local government has a specific policy for dealing with external projects that require its investment			
Local government disposes of a specific process for evaluation of the potential benefits from external projects			
The majority of external projects supported by the local government have been successful in meeting the objectives of local authorities			

The evaluation of tourism-related projects requires that a number of features are taken into consideration, after the project presentation:

⬎ *Objectives Review*. Consistency with local government objectives (economic, tourism, social, environmental, cultural) and consistency with regional/national tourism strategy;

⬎ *Concept Assessment*. Key elements and potential for success;

⬎ *Market Analysis*. Key market users and competitive analysis;

⬎ *Visitor and Financial Objectives*. Numbers as well as method and source of determining visitor projections;

⬎ *Project Cost*. Capital costs and operating cost projections;

⬎ *Risk Assessment*. Project risk and local government risk;

⬎ *Conclusion*. Potential project viability and recommendations to the government.

Detailed Checklist for Project Evaluation

Evaluation Criteria	Task
Project Application	General project description including details of the promoters
	Confirmation that all required information for decision-making has been received
	Appointment of a project team that covers the key requirements for project evaluation prior to presentation to Council. The local government may consider it appropriate to appoint external expert to the project team to provide assistance for specialist areas
Objectives Review	Confirmation that project meets the objectives of local authorities (tourism, economic, social, environmental, cultural objectives)
	Confirmation that project meets local, regional and national tourism objectives
Concept Assessment	What is the concept? (general outline of the project)
	What are the key elements of the project?
	Where will the project be located? (provision of a map and site plan)
	Who are the likely users of the facility/service? (international, domestic, day visitors)
	What is the capacity of the project? (e.g. number of visitors per day)
	What potential constraints might prevent the project implementation?
	What is the likely capital cost for project development
Site Analysis	Is the site located in an existing or potential visitor destination area, or is it en route to existing established areas? (description of pros and cons in relation to markets).
	Is the site accessible from the major markets? (number of kilometres, time, cost)
	Is the site well located in the area? (accessible, visible and close to complementary facilities and services)
	What form of transport will people use to reach the area? (bus, car, helicopter etc).
	Does it require less travel time and is it more cost effective in comparison with competing areas? (list competitors with time, costs etc)
	What are the attributes of the site and are they sufficient to attract visitors?
	Is the attraction base of the area sufficient to attract and retain visitors? (list other facilities/services).
	Are there any new developments proposed for the area which are likely to make impact on the site? (list developments and describe potential impacts).
	Are there any apparent constraints to the development on the site? (e.g. flooding).
	What are the competitive advantages of the site and location over the existing and established facilities? (list)
	What is the community response to the project/site?
Market Analysis	What is the status of the local and regional economies? (list any issues likely to impact the economies)
	Is the area growing or declining? (e.g. population).
	What is the level and structure of visits to the area? (number of visitors from each market, growing or declining, accommodation used)
	Are there any proposed developments in the area that could impact the project? (list and state how)
	What markets could potentially be attracted to the site and locality? (list the size and market trends)
	Is there a seasonality issue? (describe with possible impacts)
	Is there a strong existing market in the area or will the project need to create its own market? (analyse)
	Where will the project competition come from?
	What does the competition offer in terms of facilities, location and services? (list competitors and describe offers)
	How are the competitors performing? (numbers, profitability, customer service etc)
	What other visitor developments are proposed for the area that could provide competition for the proposed project? (list and describe)
	What is the likely impact of the proposed project on existing businesses?

Evaluation Criteria	Task
Visitor and Financial Objectives	What is the capacity of the facility/service? (hourly, daily)
	How many people will visit? (daily, monthly, annually)
	What will be the charges for visitors? (list for each element, discounts)
	What are the other revenue earning opportunities? (retail, catering etc).
	What are the revenue projections for the first five years?
	What are the projected operating costs for the first five years?
	What is the projected financial performance for the first five years?
Project Costs	What are the projected costs required for project completion and make it ready for opening? Costs to include site acquisition, design and approval, construction, set up and preopening.
Risk Assessment	What are the potential risks for the developer (e.g. higher capital costs, lower visitor numbers and revenues, higher operating costs). How will these risks be addressed?
	What are the potential risks for the local authority (e.g. up front investment with no guarantee that the project will proceed). How will these risks be addressed?
Conclusions	Will the project improve the range of tourism products available in the district/region?
	Does the project have potential for financial success?
	Will it potentially increase the number of visitors and/or length of stay to the district/region?
	Will it support the local authority's tourism and economic development strategies for the district/region?
	Can the local government's investment be liquidated in the future?
	Are there potential future costs that the local government will be committed to?
	What will be the local authority's strategy to maximise the potential from the project?
	What is the likely community response to the project?
	What are the recommendations for approval?

12. EVENT DEVELOPMENT, FUNDING AND EVALUATION TOOLBOX

a) Event Policies

In order to develop policies for funding of events, the local government first needs to confirm the objectives of its involvement. These could include:

↘ The need to determine local government objectives in providing support to events;

↘ The need to establish funding criteria, predetermined maximum levels and effective measurement tools, which will primarily award funding for a combination of product quality, organisational merit, economic and social benefits;

↘ The need for funding mechanisms;

↘ The need to determine the role of local government officers and administrators;

↘ Investigating means of introducing incentives for the better management and development of events, in general;

↘ Establishing a system whereby a regular analysis of local government-funded events is undertaken to determine future direction.

Model for application requirements

a. Event Categories

It is usually preferable to classify events in different categories, such as the ones suggested in the table.

Categories of events. Possible classification

Category "A"	Category "B"	Category "C"
⬊ New event ⬊ Have limited focus on a particular group in the town/city ⬊ Have the potential for town appeal ⬊ Report a total projected gross budget between €...... and €.......	⬊ There is definite town/city/region wide appeal ⬊ There is potential visitor appeal ⬊ Report a total projected gross budget between €...... and €......	⬊ Major event that makes definite impact beyond the region ⬊ Have been already established as visitor attractions ⬊ Have potential for alternative sources of revenue ⬊ Report a total projected gross budget in excess of €......

b. Required Documentation

In addition to completing and signing the Application form, all applicants should be asked to provide standard information, including:

⬊ Copies of documents that identify the legal structure of the organisation

⬊ An outline of the organisational structure (board and staff)

⬊ A list of full time staff including names and their responsibilities within the organisation

⬊ A brief history of the organisation and its involvement with the event

⬊ The goals and objectives of the event – why is the event organised?

⬊ Description of the event for which the funds are requested

⬊ Planning document which outlines all the major steps for organization of the event as well as deadlines for each of these steps

⬊ A detailed promotional strategy which outlines what steps have or will be taken to promote the activity to the local community and/or to potential visitors

⬊ A description of volunteer involvement including the total number of volunteers and their roles within the organisation

⬊ Projected attendance figures including an explanation of how the projection is derived.

⬊ A brief description of future goal and objectives of the event (which is expected position of the event in three to five years)

⬊ A list of all participants in the event

⬊ The demand for market involvement in the event (cultural/entertainment/sporting, etc.) and its level of prominence (local, national, international)

⬊ Detailed budget, including expenditure, confirmed and projected revenue and the amount of requested support

The application for Category "B" and "C" events might also include further information, such as:

⬊ A brief biography of each member of the Executive Board

⬊ A summary of job opportunities which will be provided including full time positions, part time positions, placements, as well as short term staff hired for implementation of the event

⬊ Any public consultations and the response of the public to the event

c. Post Event Report

All applicants should be required to submit a post event report which includes the following information about the completed event:

❧ Event evaluation by organisers (including feedback from event attendees)

❧ Audited financial report

❧ Inventory of marketing/promotional achievements; list and include copies of newspaper ads or articles; approximate number of radio and television ads; all promotional material (brochures, posters, programmes); website use and all other marketing material and achievements)

❧ Attendance figures (spectators and event participants) including a breakdown of confirmed figures and estimated totals

❧ The number of volunteers and volunteer hours

❧ Inventory of employment opportunities provided, list of full time and part time positions as well as staff hired for the implementation of the event

❧ An economic impact report identifying the amount of money spent locally by the organisation for goods and services, along with the number of out of town/city/region visitors, and the spending by visitors on specific services

d. The Process

The process of submission, evaluation and approval of proposals for funding events should be fully detailed and include the following:

❧ Application deadline yearly

❧ Staff review, including a review of applications, the preparation of an interim report detailing the number and range of applica-

tions, compared to the total funding requested, and staff evaluations of previous events. During this process, applicants might be contacted for additional information, as well as clarification of certain items

❧ Report on recommendations to the appropriate local government committee. The Report should recommend the funding levels to the appropriate local government committee for approval.

❧ Issuing of funds, according to maximum levels for each category, with a final share retained until the post event report has been completed and accepted by the local government

e) Event Evaluation

The Event evaluation checklist will help to determine whether the government has a robust approach to the evaluation of events organized by organisations that requested financial support.

Event Evaluation

Key Criteria	Yes	No	Unsure/ Partially
Local government has a specific policy for dealing with requests for funding from event organisers			
Local government has a specific process for evaluation of the potential benefits from events			
The majority of events supported by the local government have been successful in meeting the objectives			

In addition to specifying the general objectives that the local government may require for an event, it may also demand more specific information about the economic benefits which are likely to be generated by the event. One way of providing this information is by using questionnaires.

13. SMART DECISIONS TOOLBOX

According to the methodology, an effective decision-making process should fulfil six criteria:

➘ It focuses on what's important;

➘ It is logical and consistent;

➘ It acknowledges both subjective and objective factors and blends analytical with intuitive thinking;

➘ It requires only as much information and analysis as necessary to resolve a particular dilemma;

➘ It encourages and guides the gathering of relevant information as well as informed opinion.

➘ It is straightforward, reliable, easy to use, and flexible.

MARKETING TOOLBOX

Checklist. Marketing strategy information

Information	Yes	No	Unsure or Partially
Is the government demand-oriented towards its various markets (visitors, local residents, business, communities, environment, etc)?			
Are there open communication or information channels between these markets and the government?			
Are there sufficient levels of market research?			
Are significant marketing decisions informed by such research?			
Is the allocated research budget sufficient, and if not, how can it be increased?			
Is the government sufficiently knowledgeable about the visitors, their expectations, their needs and wants, and their current impressions of the destination brand?			
Is the government sufficiently knowledgeable about competitor offerings and what visitors think about them?			
Does the current destination brand position reflect the correct values, goals and objectives of the government?			
Are there appropriate feedback mechanisms in place for evaluation of the brand position?			
Is the destination brand properly disseminated throughout the target markets (visitors, local residents, business, communities, environment, etc)?			
Is new product development focused on the required tourist experience?			
Do new tourist products fall within the scope of the government's strategic objectives?			
Are marketing channels getting through to appropriate existing and potential targeted visitor markets?			
What messages are they receiving?			
How can this message be enhanced?			
How can the channel be enhanced?			
Does the government need to search for new channels?			

Direct and Indirect Tourism Marketing Channels

Direct	
Databases	They hold records on stakeholders in the tourism industry (visitors, tourism businesses, tourism service providers, communities) which ensures easier stakeholder management. It also allows for easier relationship building between entities, thus aiming to create favourable conditions for all.
Internet	Managing tourism information portals as well as government websites provides better directions for stakeholders. It assists the branding, the communications between stakeholders, and the information gathering for visitors. It also provides an important market research channel.
Consumer events	They are a great channel for direct meetings and interaction with existing and potential visitors. Also, it is an opportunity to review the promotions and offerings of competitors. If such consumer events do not exist, the government might consider organizing an event to promote and popularize the industry.
Indirect	
Tour operators	They are essential to the tourism industry as an interface among destinations, tourism infrastructure and visitors. Tour operators and travel agents prefer to have open communication channels with the government. Thus, the doors are open for making strong relationships between the government and such enterprises on local level. This would also allow for dissemination of the brand message and the strategic plan through such agencies and gathering of information about the market and respective needs, aspirations and expectations. It is usually essential to work with tour operators and support them in order to ensure that marketing objectives are reached.
Advertising	Local government can decide to advertise itself, thus providing communication to stakeholders and ensuring that all advertising within the tourism industry complies with the local government branding goals and values
Public relations	Public relations are not completely under control of the government. Press and news agencies may publish news which can either have positive or negative effects on people's attitudes towards the destination. The standard tools for public relations in tourism include press releases, press conferences and briefings, interviews, media and industry co-operations, and press trips. Online PR, blogs and podcasts are tools that started to be used recently.
New marketing channels	New market channels should be explored in order to reach out to new markets and niche markets. If such channels are inexistent, the local government might undertake the creation of such channels. Exhibitions can be one such example. The department can host an art exhibition showing the natural beauty and the community in the area with special focus on the tourism products.

J.2 Annex: Surveys

1. PUBLIC SECTOR:

Number of tourists/visitors per 100 residents

↘ Please indicate the total size of the resident population in your destination:

↘ How many tourist/visitors do you receive a year?

↘ Number of second/rental homes per 100 homes

↘ How many permanent residences are there in your destination?

↘ How many second/rental homes are there in your destination?

Percentage of the destination represented by a destination management organization

↘ How many towns, villages, and cities are there included in your destination?

Does your destination management organization represent all of the communities within your geographical jurisdiction?

Relative contribution of tourism to the destination's economy (% GDP)

↘ Which is the percentage of tourism contribution to your destination's economy (% GDP)?

Direct tourism employment as percentage of total employment

↘ How many residents are directly employed in the tourism sector?

↘ Number of tourist nights per month

↘ How many tourist nights did your destination register last year?

Number of beds available in commercial visitor accommodation facilities per 100 residents

↘ What is the total number of available beds at your destination

Occupancy rate in commercial accommodation facilities per month and in average for the year

↘ Please indicate last year's occupancy rate at your destination, per month:

↘ Average price per room in the destination

↘ What is the average room rate for accommodation in your destination?

↘ Average length of stay of tourists (nights)

↘ What is the average length of stay of tourists (how many nights do tourists typically stay at your destination)?

↘ Average length of stay of same day visitors (hours)

↘ Please indicate how many hours same-day visitors spend at your destination:

Percentage of the destination with a sustainable tourism strategy/ action plan, along with agreed monitoring, development control and evaluation arrangement

⬎ Does your destination have a sustainable tourism strategy/ action plan along with agreed monitoring, development control and evaluation arrangements?

⬎ If you have a sustainable tourism strategy/ action plan, do all of the communities within your destination participate in the strategy/ action plan?

Percentage of the destination covered by a policy promoting local, sustainable and/or fair trade products and services

⬎ Is there a destination policy in place promoting the purchase and use of local, sustainable, and/or fair trade products and services?

Percentage of the destination covered by a policy or plan that protects cultural heritage

⬎ Does your destination have a policy of protecting and enhancing cultural heritage?

Percentage of the destination's biggest events which are focused on traditional/local culture and assets

⬎ Please list (up to ten) of the biggest events held in your destination.

⬎ Please indicate in the boxes the events which are based on traditional/local culture

Percentage of the destination included in climate change adaptation strategy or planning

⬎ Does your destination participate in climate change adaptation strategic planning (e.g. water collection and storage, if applicable relocating tourism attractions, etc.)?

⬎ What is the total geographic area (km2) of your destination?

Percentage of destination (area in km2) that is designated for protection

⬎ What is the total geographic area (km2) designated as protected within the destination?

Percentage of destination covered by biodiversity management and monitoring plan

⬎ What is the total geographic area (km2) covered by biodiversity management and monitoring plan?

The destination has policies in place that require tourism enterprises to minimize light and noise pollution

⬎ Does your destination have policies in place that require tourism enterprises to minimize light and noise pollution?

Percentage of the destination and percentage of population covered by local strategy and/or plans to reduce noise and light pollution

⬎ Does your destination have a local strategy and/or plans to reduce noise and light pollution?

⬎ If yes, what percentage of the population lives in the area covered by this strategy?

Percentage of destination served by public transport that is accessible to people with disabilities and people with specific access requirements

⬎ What is the total geographic area (km2) served by public transport that is accessible for disabled passengers in your destination?

2. VISITOR SURVEY

Average travel (km) by same day visitors from and to destination

↘ Which is the postcode of your country of residence?

↘ Country: Postcode:

Average travel (km) by tourists to and from home or average travel (km) from the previous destination to the current destination

↘ Where did you come from today? □ Home □ Other Destination:

Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)

↘ What was the primary mode of transport you used to travel here?

□ Train □ Airplane □ Bus □ Car (own, friends, firm)
□ Car (hired) □ Motorcycle □ Bicycle
□ Walk □ Caravan/Van/Truck □ Boat/Ship/Ferry
□ Other, please specify:

Percentage of visitors using local/soft mobility/public transport services to get around the destination

↘ What method of transport did you use/are you planning to use during your stay here?

□ Bicycle □ Local public transport (bus, train…)
□ Others (private cars, tour buses, taxi…)

Number of tourist nights per month

↘ Did you stay here overnight?

Average length of stay of tourists (nights)

↘ How many nights did you stay in this destination?

Average length of stay of same day visitors (hours)
How many hours did you spend in this destination?

Percentage of repeat/return visitors (within 5 years)
Was this your first visit to this destination?
How many times have you visited this destination in the last five years?

Daily spending per tourist (accommodation, food and drinks, other services) Daily spending per same day visitor

↘ How much did you spend per person per day during your stay here? (including accommodation, transportation within the destination, food and drinks, shopping and entertainment expenses)

□ < 25 €   □ 100 – 200 €   □ 25 – 50 €   □ > 200 €   □ 50 – 100 €

Percentage of visitors who are satisfied with their overall experience in the destination

↘ Overall, I am satisfied with my visit to this destination.

↘ Do you or someone else travelling with you have a disability or reduced mobility?

Percentage of visitors satisfied with the accessibility of the destination for people with disabilities or specific access requirements

↘ This destination takes the special needs of visitors with disabilities into consideration in all areas of its operations (accommodation, public transport, tourism attractions, etc.).

3. RESIDENTS SURVEY

Percentage of residents who are satisfied with tourism in the destination (per month / season)

↘ Overall, I am very satisfied with tourism in my destination in different seasons

↘ There are benefits for the community from tourism and tourists visiting my destination.

↘ I have personal benefits from tourism and tourists visiting my destination.

Percentage of residents satisfied with their involvement and their influence in the planning and development of tourism

↘ Overall, I am very satisfied with residents' involvement and influence in the planning and development of tourism.

Percentage of residents who have positive or negative views on the impact of tourism on destination's identity

↘ In your opinion, what kind of effect does tourism have on the distinctiveness and local identity, culture and heritage of your destination?
□ It's damaging □ It helps maintenance □ It helps improvements □ It has no effect

↘ In your opinion, what kind of effect does tourism have on the quality of your life in your destination?
□ It's damaging □ It helps maintenance □ It helps improvements □ It has no effect

4. INDUSTRY SURVEY

Indicate your type of business:

□ Accommodation □ Catering □ Entertainment provider □ Outdoor recreation provider

□ Transport □ Other, please specify:

Indicate your position in the business:

Percentage of seasonal jobs in tourism

↘ How many employees do you have throughout the year?

↘ Full-time employees, Part-time employees, Seasonal employees, Trainees/Interns

↘ Other, please specify:

Percentage of tourism enterprises providing student internships

↘ Does your enterprise provide student internship programs?

Percentage of men and women employed in the tourism sector

↘ What is the number of women and men working in your enterprise?

↘ Women Men / Full-time employees, Part-time employees, Seasonal employees, Trainees/Interns, Other, please specify:

Percentage of tourism enterprises where a woman holds the position of general manager:

> ⬊ Is the general manager in your enterprise a woman or a man?

Average wage in tourism for women compared to average wage for men (sorted by type of job in tourism)

> ⬊ Please indicate the gross combined salary per month for your employees:

> ⬊ Women Men / Full-time employees, Part-time employees, Seasonal employees, Trainees/Interns, Other, please specify:

Average price per room in the destination

> ⬊ If you run an accommodation facility business, what is your average room rate?

Percentage of visitor attractions that are accessible to people with disabilities and/or participating in recognized accessibility schemes

> ⬊ Do you participate in a recognized accessibility scheme (certification or labeling system that rates the accessibility of accommodation and attractions for visitors with limited mobility)?

Percentage of commercial accommodation facilities with rooms accessible to people with disabilities and/or participating in recognized accessibility schemes

> ⬊ If you run an accommodation facility business, do you have rooms adapted to the special needs of visitors with disabilities or visitors with limited mobility?

Percentage of tourism enterprises that have been inspected for fire safety in the last year

> ⬊ Has your enterprise been inspected for fire safety in the past year?

> ⬊ Inspection date:

Percentage of ten largest tourism enterprises involved in destination management/ cooperative marketing

> ⬊ Does your enterprise participate in any cooperative marketing activities for the destination (e.g. involvement in associations of tourism enterprises or promotional / advertising programs)?

PARTNER ORGANISATIONS

Organizations, institutions and companies that have given significant support to NALAS and its Member Associations are recognized as NALAS Partners. Their support may include, but is not limited to lobbying for NALAS and its members, expertise support and financial support. In addition, NALAS proved to be a valued asset for many of these partners, by providing regional experience, guidelines or coordination of activities conducted in the member countries

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Institutional Strengthening of the
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