



STUDY ON THE FEASIBILITY OF A EUROPEAN TOURISM INDICATOR SYSTEM FOR SUSTAINABLE MANAGEMENT AT DESTINATION LEVEL

Recommendations for Maintenance and Improvement of the European System of Indicators

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Executive Summary

This report is an overview of the recommendations from the overall results of the study. The purpose of the project was: i) to investigate the feasibility of a Europe-wide system of tourism indicators for the sustainable management of destinations, and ii) to make recommendations for its implementation.

Considerable work has gone in to the development of the Tourism Sustainability Group (TSG) indicators and testing their feasibility in NECSTouR and EDEN destinations. However, there is currently no widely accepted process and methodology for the sustainable management of destinations using the indicators.

The European Commission aims to address this and move towards more comprehensive, inclusive and sustainable ways of working, by providing an indicator system for destinations to use on a voluntary basis. This will ultimately improve the information available to tourism stakeholders and add value to the European tourism experience. The long term aim is that the system will serve as a guide to policy makers and other destination stakeholders for the improved management of tourism destinations across Europe.

The task of the project team was to develop an inclusive, user-friendly methodology for applying indicators to enhance the sustainable management of tourism destinations across Europe.

In order to do this, five principle task areas were identified:

1. Review of international sustainable tourism indicators systems
2. Review of the results of NECSTouR and EDEN schemes
3. Adjustment to the TSG core set of indicators and development of a guidance toolkit
4. Testing of the feasibility of the proposed indicators and Toolkit in a number of pilot destinations across Europe
5. Adjustments to indicator set and toolkit, with recommendations shared at a regional conference

This is the report from Task 5. It provides a summary of the key recommendations from the each phase of the project.

Summary of Recommendations Resulting from Global Indicator System Analysis

The purpose of the case study review was to assess the strengths and weaknesses of sustainable tourism indicator programmes globally so lessons learned could be applied to the EU System of indicators. Eight case studies were selected for in-depth evaluation. The case study process included desk research, interviews, and side-by-side comparison¹.

As a result of the research, recommendations were made in four areas: indicators, piloting, toolkits and reporting.

- The indicator recommendations highlighted the need for systems to be simple and to be integrated with existing destination monitoring rather than only focusing on sustainability.
- The piloting recommendations noted the importance of stakeholder ownership, drive and engagement through the establishment of destination task forces.
- The toolkit recommendations stressed the value of designing manuals to be easy to use and to be accessible to those without in-depth technical training.
- The reporting recommendations stressed the need to ensure monitoring results have a clear purpose, use and means of impacting policy decisions through communication and benchmarking.

The case studies demonstrated how monitoring can improve the information available to policymakers, assist destinations to develop tourism in a more sustainable manner, raise the profile of destinations, increase visitor satisfaction and enhance the long-term economic benefits from tourism. They also show how differing changes in policymakers, loss of project champions, conflicting regulatory frameworks and inconsistent availability of funding are the primary cause of the discontinuation of tourism monitoring systems.

Task 1 concluded that to be successful, sustainable tourism monitoring systems need to show a clear return on investment to those involved. The following recommendation was made to encourage the uptake of the TSG indicators: to clearly demonstrate, during the piloting, the value, costs, and benefits of using indicators for the sustainable management of destinations.

¹ The eight systems examined were: UNWTO and Global Sustainable Tourism Criteria (GSTC), Travelife Sustainability System, Sustainable Tourism Zone of the Caribbean (STZC), Pan Parks, Dublin Institute of Technology ACHIEV Model, Whistler2020, Mexico Sustainable Tourism Programme, British Destinations

Summary of Recommendations Resulting from the Analysis of the TSG Indicators

The purpose of Task 2 was to guide revisions to the core set of TSG sustainable tourism indicators based on the recommendations from the NECSTouR and EDEN evaluation reports, and interviews with key NECSTouR and EDEN destination member representatives.

The review noted that the TSG had provided a balanced set of indicators that clearly respond to user needs and the availability of data. It found that the TSG set of indicators is well integrated, combining tourism trend data with sustainability metrics.

The review also noted a number of weaknesses in the indicator set. It identified gaps in information needed for implementation, such as clear definitions, support tools, methodology, and capacity building. It also noted that to date, the indicators have not addressed institutional and governance issues such as organisational roles and responsibilities, linkages with policy, regulations, or incentives for implementation. Inconsistent use of terms and unnecessary complexities in the indicator formulation were also highlighted.

When compared with the Global Sustainable Tourism Council (GSTC) Criteria for Destinations, a number of gaps were identified. More than half of the GSTC criteria are not fully represented in the TSG Indicators. The project team noted that the TSG set would not be considered “GSTC recognised” without significant addition or modification of indicators and indicator categories. Full GSTC alignment, although highly recommended, was regarded as too dramatic a shift in direction at this stage, given the considerable investment and stakeholder engagement in the current TSG set. Nevertheless, in consideration of the NECSTouR, EDEN, GSTC, and the Case Studies in Task 1, some specific changes to the indicators were recommended and a revised set was drawn up for piloting. In addition, some general recommendations were made and include the following:

- Ensure that the toolkit is clear, simple, inclusive, flexible and accessible and not so prescriptive that it becomes a barrier to use.
- Ensure survey templates have consistent language and guidelines, including procedures for implementation, as they are needed for many of the indicators.
- State the rationale for including each indicator in the toolkit and address “applicability” or “appropriateness” of some of the indicators, e.g. accessibility issues.
- Use piloting as an opportunity to develop a clear rationale for monitoring. The existing TSG Core Indicators do not yet address the issue of why destinations would want to participate, what the advantages of participation are, or what the likely return on investment might be.
- Design straightforward, easy-to-visualise results such as a traffic light system that can help raise the profile of the project. The more transparent the process of data analysis and reporting, the greater the credibility of the system.

- Have a clear purpose for the results and design the analysis to meet this purpose. The ability to benchmark and share best practices across destinations can create meaning, motivation, and marketing value.

A revised set of indicators and an accompanying toolkit were delivered in a separate report for Task 3: *To Propose a European System of Indicators for the Sustainable Management of Destinations*.

Summary of Recommendations Arising from Testing

The purpose of Task 4 was to test the feasibility of a Europe-wide system of indicators, recommend revisions to the toolkit and gain understanding of the opportunities and constraints presented. Testing was undertaken in a total of fourteen separate destinations, selected to represent the breadth of European tourism². Recommendations related to improvements to the indicator system toolkit, based on the findings from the testing, are summarised here. Those findings related to implementation of the System are summarised in the following section.

- Simplify the Destination Profile Form and highlight the fact that it can be adapted. Include a section on defining the boundaries of the destination.
- Target the Step-by-Step Guide at the “Local Co-ordinator” or “Destination Co-ordinator” rather than the DMO and provide suggestions and criteria for whom this might be.
- Simplify the information on setting up a Stakeholder Working Group and clearly link key stakeholders to the relevant core indicators. Place firm emphasis on the financial benefits of implementing the System, in the toolkit introduction.
- Highlight the ability for stakeholders to create a customised set of indicators specific to their destination and the opportunity for destinations to add additional optional indicators of their own.
- Emphasise the flexibility of Survey Templates to be adapted as necessary to suit the destination.
- Re-assess the usability of the Dataset over the next 12-24 months following greater input of data by destinations. When enough data has been input to inform the development of appropriate benchmarks, consideration should be given to their inclusion.
- Invest in professional branding, design and presentation of the System to engage a wide cross section of the tourism industry.

² The ten destinations selected for full testing (with visits by project team members) were: Alqueva (Portugal), Brasov (Romania), Calvia (Spain), Durbuy (Belgium), Florence (Italy), Oetztal (Austria), Maastricht (Holland), Soomaa National Park (Estonia), St Ives (UK) and St Tropez (France). An additional four destinations were selected for ‘light touch’ testing (self evaluation of the indicators and toolkit), these were Brighton (UK), Algarve (Portugal), Wild Taiga (Finland) and Mourne Area of Outstanding Natural Beauty (Northern Ireland).

- Advise branding/design agency or expert, that the word “Sustainability” should not be overly prominent within the System’s name, due to the negative connotations ascribed to it by those in more mainstream, commercial roles.
- Make the simple amendments suggested to refine the System in the short-term. In the medium term (following professional branding and design), the toolkit should be published.
- Clarify and communicate the Commission’s intentions for the System to ensure all users understand the bigger picture and identify how destinations engage with the System initially (i.e. how and where they source the Toolkit).

Project Next Steps

Recommendations for the Successful Implementation of the Indicator System Across Europe

An additional aim of Task 4 was to gain an understanding of the opportunities and constraints associated with implementing the indicator system in destinations. Based on the findings from the testing, the recommendations for rolling out the System across Europe in the immediate future (i.e. the next twelve months) are as follows:

- Translate the System into the relevant European Union languages, as the concepts and terminology are too complex for multidisciplinary teams with varying standards of English, to engage with effectively.
- Promote the System through existing networks, ensuring the business case for implementation is strengthened to engage those for whom economic sustainability is a major driver. Ensure that a clear understanding of the benefits, the system itself and the availability of any on-going support to implement the system is communicated.
- Support the System with an online website / management tool for education, outreach, communications, capacity building, benchmarking and best practices sharing. This should have all elements of the Toolkit and Dataset as well as address resource constraint issues (e.g. a section on advice for funding of surveys).
- Disseminate information verbally wherever possible, through networks, at conferences and via partner organisations. An awareness/training video, webinar, or presentation similar to the testing workshops, will facilitate awareness-raising and build capacity.
- Include a section related to Destination Management on the website recommended above. This should provide details on issues related to the European Sustainable Tourism aims and objectives, together with information regarding lessons learned and how to promote a destination with regard to the system.

- Aim to support the formation of effective Stakeholder Working Groups (SWGs) through all available EC channels. Placing a greater emphasis on the System as a business management tool should help, but other incentives for senior government figures, municipal utilities and the private sector to participate, may also be required.
- Forge further links with existing sustainable tourism and quality standard schemes to promote awareness of the System and the fact that it can complement rather than compete with other management/sustainability systems.
- Endeavour to address the resource gap in destinations. Financial support is essential for many smaller destinations to undertake basic co-ordination of the System and particularly for resource intense activities such as surveying. External professional support (which in the pilot destinations doubled as capacity building) is also likely to be necessary in the many destinations unfamiliar with both indicator systems and sustainable tourism.
- Address the issue of a lack of clear management remit. Many destinations do not have representatives responsible for both management and promotion. There is a need to differentiate the stakeholders interested in the System, from those who can fund it, benefit from it and have the ability to act on the results. A concern is that regions that have the mix of size and governance to implement the system (e.g. NECSTouR), may be the most appropriate jurisdictionally, whereas smaller 'destinations' have the sense of community required to operate the system, but will need additional support (e.g. EDEN).

Future Considerations / Alternatives for Developing and Maintaining the System

To achieve widespread adoption across the European Union and to demonstrate continuous development as a robust and effective management system, the project team recommends that the following actions are taken.

- Assess the ability of the System to generate measureable fiscal benefits for destinations (i.e. through further analysis of early adopters such as Alqueva, Florence and St Ives). Such evidence, which may include improved destination reputation, greater visitor satisfaction and an increase in daily spend per visitor would help strengthen the business case for implementation in destinations with resource constraints.
- Consider encouraging the private sector to fund (or partially fund) local co-ordination of the System longer term. For this to be successful however, enterprises operating in destinations must be able to clearly identify return on investment from System implementation.
- Stimulate adoption of the indicator system by building incentives into existing procedures such as funding applications, to further encourage implementation.
- Develop and run training programmes for destination managers on how to use the system.

- Incorporate a recognition or award element into the System to illustrate progress made by particular destinations. This has potential in the longer term to be made consumer facing and could be linked to other EC funded certification initiatives such as the Travelife scheme.
- Undertake GSTC alignment with the eventual aim of accreditation to underpin the credibility of the System in the long term.
- Revisit The Dataset tool after more extensive use to incorporate the information needed to allow benchmarking against achieved standards.
- Consider hosting the Dataset on a central portal, accessible through the System website, to allow benchmarking between destinations. Owning this data centrally would also permit the Europe-wide mapping of sustainable tourism management.
- Review and revise the System indicators every three to five years to maintain credibility and relevance.
- Clarify ownership of the system and any materials, publications, and websites. Decide how these are revised and updated
- Internationalise the system (with particular focus on the developing world) to manage the impact European tourists are having outside, as well as inside Europe.