



PRINCIPLE 08

Monitoring & Evaluation



Monitoring is the process of taking regular measurements of something, normally using indicators, in order to provide a better understanding of the current situation, as well as trends in performance.

An indicator is a tool used in monitoring and evaluation. Indicators help simplify complex information by selecting and measuring one element as an indication of the state of a particular issue.

UNWTO has promoted the use of sustainable tourism indicators since the early 1990s, as essential instruments for policy- making, planning and management processes at destinations. UNWTO, Rainforest Alliance and the United Nations Environment Programme (UNEP) developed “The Global Sustainable Tourism Criteria.” The Global Sustainable Tourism Criteria (GSTC) are a set of 37 voluntary standards representing the minimum that any tourism business should reach to protect and sustain the world’s natural and cultural resources while alleviating poverty. A broad-based stakeholder consultation process of over 40 of the world’s leading public, private, non-profit, and academic institutions joined together to analyze thousands of worldwide standards in the formulation of GSTC.

Global Sustainable Tourism Criteria are used by businesses and organizations around the world, to better understand sustainable tourism. The criteria are organized around four main themes:

1. Effective sustainability planning;
2. Maximizing social and economic benefits for the local community;
3. Enhancing cultural heritage
4. Reducing negative impacts to the environment.

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Simple steps for Monitoring and Evaluation of Tourism Activities

Planning to Monitor	<ul style="list-style-type: none">- Discuss and plan the idea of monitoring with stakeholders- Set objectives for monitoring- Discuss general practical issues such as who will be involved, the boundaries of the study area, the resources required, and timing for monitoring
Scoping Key Issues	<ul style="list-style-type: none">- Research key issues facing the business and community- Hold community meeting to review and prioritize issues- Seek input of monitoring working group to finalize list
Developing Indicators	<ul style="list-style-type: none">- Review long list of existing indicators to match these with the key issues- Brainstorm in small groups to find new indicators to match issues- Screen potential indicators using simple screening questions- Fine-tune indicators with technical expertise where necessary
Collecting Data	<ul style="list-style-type: none">- Identify data sources- Design data collection methods such as surveys and questionnaires.- Design a simple database to hold the results
Evaluating Results	<ul style="list-style-type: none">- Establish year-one benchmarks- Identify appropriate thresholds for management response
Planning the Response	<ul style="list-style-type: none">- Identify poor performing indicator areas- Research possible causes for poor performance- Decide on a management response- Draw up an action plan
Communicating Results	<ul style="list-style-type: none">- Design communication methods for different stakeholder groups- Publish results and update regularly
Reviewing and adapting	<ul style="list-style-type: none">- Review objectives and key issues- Review indicators and data collection- Review of management responses

Basic tools for tourism planning, management and monitoring

To identify and measure the entire range of impacts (environmental, social and economic) that tourism can have, accurate information is needed for responsible decision-making. Sustainability indicators are information sets which are formally selected for regular use to measure changes in key assets and issues of tourism destinations and sites across

- Economic/ Profit;
- Ecological/Planet;
- Social/People

Key components for monitoring destination performance

- Audit of tourism supply – the number of accommodation providers, campsites, and visitor attractions in their area.
- Volume and value of tourism data – assessment of the number of visitors to a destination and the value of these visits to the economy.
- Overall visitor satisfaction – customer perceptions of a destination and to identify needs.
- Local resident satisfaction – level of satisfaction with the tourism services in their area, and their views on the impact of visitors and the provision made for them.
- Tourist Information Centre satisfaction – views of a full cross section of visitors.
- Local industry satisfaction
- Evaluating the effect of marketing
- Quality issues
- Environmental considerations – local produce sourcing, recycling programs, green business programs, should also be part of the monitoring process.
- Comparative Performance Indicators – core and composite
- Destination Benchmarking



Criteria for sustainable tourism

01

Community wellbeing

- Income and revenues
- Employment
- Strengthening of the local economy and long-term economic
- Viability
- Improvement of living conditions
- Participation in decision-making and local control
- Satisfaction with tourism
- Strengthening of social and cultural patterns
- Adapted from UNEP/GEF and UNESCO/MAB 2007

Use of visitor management

- The destination has a visitor management system for attraction sites that includes measures to preserve, protect, and enhance natural and cultural assets.
- Administrative mechanism responsible for implementing visitor management plans and operations
- Composite early warning measures of key factors affecting the ability of the site to support different levels of tourism – Tourist/host population ratio (peak period and overtime)

Intellectual property

- The destination has a system to contribute to the protection and preservation of intellectual property rights of communities and individuals
- Laws, regulations or programs to protect intellectual property rights of local individuals and communities

02

Natural and cultural environment

- Sustainable use of natural and cultural resources
- Protection of natural heritage
- Protection of cultural heritage
- Enhancement of environmental awareness

Attraction protection

- The destination has a policy and system to evaluate, rehabilitate, and conserve natural and cultural sites, including built heritage (historic and archaeological) and rural and urban scenic views.
- Management system to protect natural and cultural sites, including built heritage and rural and urban scenic views.
- Qualitative measure of those site attributes that make it attractive to tourism and can change over time
- Management system to monitor, measure, and mitigate tourism impacts on sites and attractions; Composite measure of levels of impact on the site – its cultural attributes due to tourism and other sector cumulative stresses.

03

Tourism product quality and tourists' satisfaction

- Quality of services and experience
- Tourists' satisfaction
- Tourism product quality and economic viability
- Communication of sustainability towards the tourists
- Cultural Exchange as a driving force for peace

Visitor behavior

- The destination has published and provided guidelines for proper visitor behavior at sensitive sites.
- Such guidelines are designed to minimize adverse impacts on sensitive sites and strengthen positive visitor behaviors
- Cultural and environmental guidelines for visitor behavior in sensitive sites
- Code of practice for tour guides and tour operators

Site interpretation

- Accurate interpretive information is provided at natural and cultural sites. The information is culturally appropriate, developed with community collaboration, and communicated in languages pertinent to visitors.
- Interpretive information available to visitors in tourist offices and at natural and cultural sites
- Interpretive information is culturally appropriate
- Interpretive information is developed with community collaboration
- Interpretive information is available in languages pertinent to visitors
- Tour guide training in the use of interpretive information

04

Management and monitoring

- Management and monitoring planning
- Carrying capacity
- Cultural heritage protection
- The destination has laws governing the proper sale, trade, display, or gifting of historical and archaeological artifacts.
- Laws or regulations to protect historical and archaeological artifacts including those located under water, and evidence of their enforcement
- □Program to protect and celebrate intangible cultural heritage
- (e.g., includes song, music, drama, skills and crafts)

WTO Core Indicators of Sustainable Tourism

Specific Measures

- Site Protection: Category of site protection according to the International Union for the Conservation of Nature (IUCN) index
- Stress: Tourist number visiting site (per annum / peak month)
- Use intensity: Intensity of use in peak period (person / hectare)
- Social Impact: Ratio of tourist to locals (peak period and overtime)
- Development Control: Existence of environmental review procedure or formal controls over development of site and use densities
- Waste Management: Percentage of Sewage from site receiving treatment (additional indicators may include structural limits of other infrastructural capacity on site, such as water supply)
- Planning Process: Existence of organized regional plan for the tourism destination (including tourism component)
- Critical Ecosystems: Number of rare / endangered species
- Consumer Satisfaction: Level of satisfaction by visitors (questionnaire based)
- Local Satisfaction: Level of satisfaction by locals (questionnaire based)
- Tourism Contribution to Local Economy: Proportion of total economic activity generated by tourism only

Source: A Practical guide to the Development and Use of indicators of Sustainable Tourism, WTO, 1996

Composite Indices

Carrying capacity

Composite early warning measure of key factors affecting the ability of the site to support different levels of tourism

Site Stress

B.Composite measure of levels of impact on the site (its natural and cultural attributes due to tourism and other sectors cumulative stresses)

Attractiveness

C.Qualitative measure of those site attributes that make it attractive to tourism and can change over time

Source: Practical guide to the Development and Use of indicators of Sustainable Tourism, WTO, 1996



Sustainability
Principles

**For more information about the
Alliance and our projects**

please visit : <https://www.srilankatourismalliance.com>
email us at : welcome@srilankatourismalliance.com