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A Manual for Evaluating the Quality Performance of Tourist Destinations and Services

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Introduction

Quality is vital for a successful tourism industry. Europe has an exciting mix of different products that can be offered to the tourist, and it enjoys a stable market share. Nonetheless, a rapid growth in alternative destinations worldwide means that Europe's tourism industry today faces the need to be ever more quality conscious to continue to attract tourists in a global marketplace. Quality is rapidly becoming the decisive competitive instrument in tourism.

A quality product is crucial – for a viable business, for an attractive destination and for the sustainability of the tourism industry across Europe. Ensuring the constant improvement of quality, whether it is of a tourist destination as a whole or of the individual attractions and services within it, should be a continuous process. It means setting objectives, developing a strategy, making improvements and checking results.

This manual provides a tool to facilitate measuring, monitoring and benchmarking the quality performance of your tourist destination and services. In this manual it is called "QUALITEST". The core of the tool is a set of 16 headline indicators for use in Quality Performance Evaluation of tourist destinations and services. This manual presents the indicators and provides detailed instructions for their use.

Why use QUALITEST?

Consumers are increasingly choosing those offers in which they can be certain that the services, outdoor experiences and also the welcome from the local population are of a high quality and worth the price paid. At the same time, tourist destinations and the providers of tourist services are increasingly confronted with changes in guest expectations and requirements, and increasing competition at home and abroad. A lack of attention to quality issues now could have serious consequences later in terms of loss of image, falling income and the initiation of potentially expensive damage limitation exercises.

QUALITEST is based on sound business practice, in effect what tourist destinations should be doing automatically to give best value. Using QUALITEST will help tourist destinations and the enterprises within them to maintain the quality of their offer, but it should be underlined that QUALITEST is not a guarantee of quality in itself. The indicators provide the user with vital information on the results of implementing quality processes in the destination, but those processes still have to be implemented, which requires both destination and stakeholders to commit to a continuous process of quality management.

Ten good reasons for a quality approach!

1. Quality gives the edge over competitors.
2. Quality performance makes destinations and services easier to market, both to operators and tourists.
3. A quality product results in customer loyalty.
4. Better quality means more profit.
5. Quality management leads to a stable tourism industry and protects jobs.
6. Quality improvements in a destination provide a better quality of life for local residents.
7. Quality management improves access to finance.
8. Effective monitoring of progress avoids repeating costly mistakes.
9. Careful data collection provides the tool for making the right management decisions.
10. Monitoring progress in quality improvement provides the understanding that encourages proactive management.

Who can use QUALITEST?

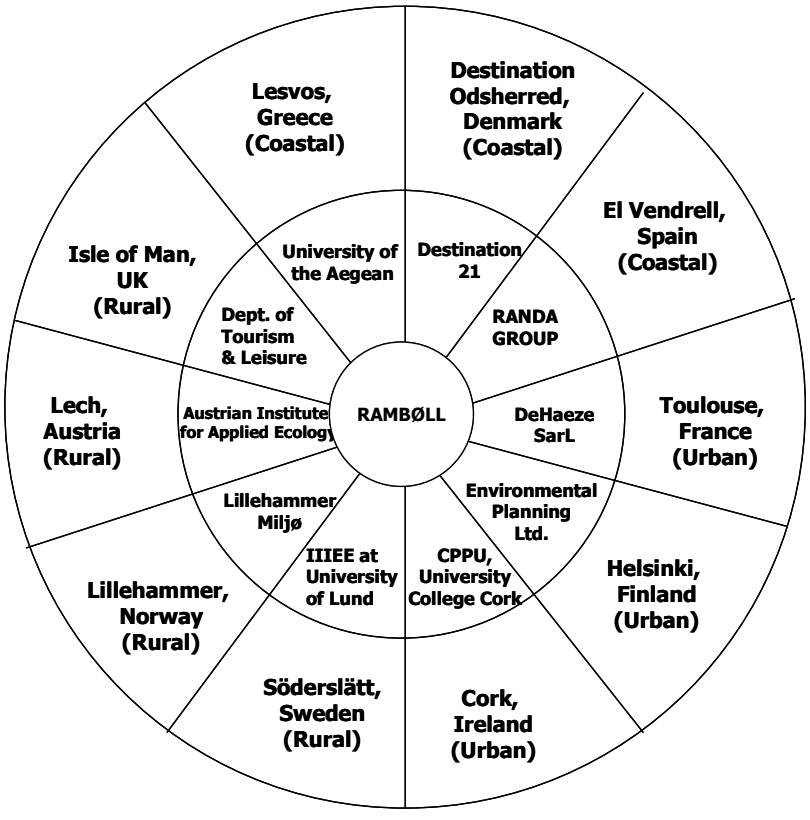
The QUALITEST tool has been designed for evaluating the quality performance of tourist destinations and their related services. Here a tourist destination is understood to be an area which is separately identified and promoted to tourists as a place to visit, and within which the tourism product is coordinated by one or more identifiable authorities or organisations. As such, QUALITEST has a wide range of potential users. It can, for example, be used to good effect by:

- **Local destination managers** that want to use an integrated approach to measuring and monitoring quality trends in their destination, and see how they perform in comparison with similar destinations;
- **Other public authorities** that are interested in the quality performance of the tourism industry in their destination, and need some tips on how to proceed;
- **Tourist services**, ranging from collective accommodation to outdoor activities, that want to identify relevant points to measure for monitoring their own quality performance; and
- **Travel organisers and intermediaries** that are interested in monitoring the performance of the tourist destinations that they send their customers to, and can use the indicators as a basis for dialogue with the local destination manager.

What kind of tourist destinations and services does it cover?

QUALITEST has been developed so that it can be applied to any type of urban, rural or coastal destination in Europe. The tool was developed using the life cycle of a typical holiday experience. The tool therefore focuses on the service points that occur throughout this lifecycle, and incorporates them into the indicators. In principal it is relevant for any type of tourist destination and its associated tourism and transport services.

How was the manual developed?



This handbook is the result of a study that RAMBØLL (Denmark) undertook for the Tourism Unit, Enterprise DG, of the European Commission. The study was carried out in association with subcontractors that functioned as the link between a destination and the contractor (see diagram) and as its "sparring partner".

Websites with more information on the destinations participating in the study are listed in Annex 6. The destinations chosen are a mix of rural, coastal and urban destinations and reflect the diversity of EU tourism. Furthermore, the Præstø Fjord region (Denmark) participated in the study in its later stages.

What does this manual cover?

The manual consists of four sections:

- Section 1 analyses **Quality Management in Tourist Destinations and Services**.
- Section 2 presents the concept of **Quality Performance Evaluation (QPE).**
- Section 3 provides **A Roadmap for QUALITEST** with good advice on getting started.
- Section 4 presents **The QUALITEST**, which is based on a set of 16 headline indicators that the user can apply for QPE.

Six Annexes provide additional information: Annex 1 presents the basic **Terms and Definitions** that are essential for understanding the indicators, and to ensure a common approach to their development, which is of vital importance for a meaningful benchmarking process. Annex 2 presents all the numbered references. The other annexes provide relevant factual information, for example the websites of the destinations that participated in the study.

Limitations

The study undertaken identified a series of limitations. Firstly, although the wide range of destination types involved in the study reflects the diversity of European tourism, the destinations used are by no means representative of European tourism. Further work is needed with a larger platform of destinations to develop benchmarks that are representative for EU tourism. Secondly, it's important to note that QUALITEST is a generic tool. It is therefore recommended that individual destinations adapt the surveys and indicators in the tool, depending on their own specific circumstances, and build networks with similar destinations to develop the benchmark values necessary for quality comparison. Finally, QUALITEST works with indicators that provide only a small degree of information on much bigger issues, and again individual destinations should supplement the indicators if need be to develop a broader insight into an issue of particular interest.

Section 1. Quality Management in Tourist Destinations and Services

This section discusses why quality management is an important issue in today's tourism, and briefly outlines the Integrated Quality Management concept. It discusses how Quality Performance Evaluation can benefit tourist destinations and their associated services, and presents some of the work that has already been done. Finally, it reviews the investment needed for carrying out this work in your destination.

Why focus on quality?

Market research shows that the European tourist is maturing, and demanding higher levels of quality when on holiday. In other words, they are seeking good value for their money. Furthermore, European destinations are now competing in a global market place, and the quality of the tourist experience is arguably just as important for competitive edge as price.

Quality gives the competitive edge

German tourists are a vital market segment for many European tourist destinations. The 2002 edition of "Reiseanalyse", a German travel and tourism survey commissioned by the Forschungsgemeinschaft Urlaub und Reisen (FUR), contained a series of questions on environmental quality[1].

The results showed that every second German tourist places high demands on the destinations that they visit in terms of beach cleanliness, and litter and noise pollution. Furthermore, every third German tourist is interested in a good public transport system in the destination[2]. The QUALITEST tool for tourist destinations and services covers all these quality issues.

Integrated Quality Management (IQM)

As the example above shows, the tourists' satisfaction level from staying at a destination depends not only on their experience of specific tourist services, but also on more intangible factors, for example hospitality, safety and security, and cleanliness. The success of a destination is therefore a function of many interdependent components. This underscores the need for an integrated approach to managing the quality of tourist destinations on a continuous basis.

The concept of the Integrated Quality Management of destinations was developed to satisfy this need. IQM combines four key elements in its approach:

- **Tourist satisfaction**, which primarily consists of regularly monitoring the tourists' levels of satisfaction with the services in the destination.
- **Local tourism industry satisfaction**, a key activity of IQM involves evaluating the quality of the jobs and the careers of industry employees, as well as the well-being of local tourism enterprises.
- **Local people's quality of life**, concern for the well-being of residents means that a destination should find out what the resident population thinks of the effects of tourism.
- **Environmental quality**, measures of the positive or negative impact of tourism on the environment, i.e. the destination's natural, cultural and man-made assets.

Any imbalance in one of these four tourism quality aspects can have a significant effect on the overall quality of the destination and the tourism product.

The IQM approach for destinations is a cyclical model, as illustrated in the diagram in Annex 3. There are basically five stages in the IQM approach:

1. Identify the partners
   - In the first instance a genuine plan is needed, backed by a leader capable of rallying and influencing all the partners in the destination in question.

2. Decide on actions
   - The strategy and the policies that it requires (human resources, natural resources, quality of life, cultural heritage, etc.) can then be drawn up and placed on a formal footing by the partners involved, under the supervision of the lead authority.
3. Implement actions
   - This lays the foundation for the implementation of measures by the various public and private providers of the different services to be provided, both within and outside the system.
4. Measure effects
   - The approach is regularly measured, using a set of indicators, by the partners involved and the lead authority in order to survey the satisfaction of the various target groups, integration into the community and conservation of resources from the point of view of sustainable development.
5. Evaluate and adjust
   - In this interactive process, the authority leading the plan ensures that results are analysed and lessons drawn from them so that those corrections and additions felt to be important can be injected at each level of the chain in order to ensure the correct functioning of the chain as a whole. It is this ongoing repetition that causes the system to operate as a loop.

The QUALITEST tool complements the IQM concept because it proposes indicators within the four key elements of IQM that a tourist destination needs, in order to be able to monitor the overall levels of tourism quality in the destination. It therefore fits into stage 4 of the IQM approach.

The above section on IQM features extracts from three IQM studies published by the European Commission. These studies provide the reader with a comprehensive guide to the application of IQM in tourist destinations (see Useful Documents section in Annex 3).

What's in it for tourist destinations?

In most destinations the final product that the tourists experience, and therefore the memories that they take home with them, is a complex fusion of their exposure to many different phenomena in the destination, for example the local tourism industry, the destination's resident population and the environment in the destination. This relationship is interlinked because not only do these aspects influence the tourist experience, but the tourists in turn influence these aspects.

QUALITEST is of benefit to tourist destinations because it provides them with:

1. An integrated tool for measuring and monitoring the internal quality performance of the destination over time, and
2. A vehicle for benchmarking their quality performance externally with that of similar destinations.

Quality management is a cyclical process, and the development of the quality strategy is not the end of the process in the destination but just the beginning. Objectives set in the strategy should be implemented and the related output targets need to be measured to evaluate the success of the actions. It is also necessary to monitor the impacts of tourism upon the destination as a whole.

Obviously, the QUALITEST tool cannot predict what objectives each tourist destination should be implementing and develop indicators for measuring the success of those actions in meeting their targets.

Instead, using QUALITEST, a destination is provided with a set of core indicators to measure and regularly monitor and evaluate the results of its work with quality management on the visitor, tourist services, the environment and the local community. By keeping records of its quality performance from previous years, the destination can see if there has been a positive or negative development over time for each indicator.

Importantly, QUALITEST can be used to communicate quality performance to relevant stakeholders, for example via an annual report. Quality management in tourism is a complex issue, and QUALITEST proposes a set of indicators that can be used to give an overview of quality in the destination and the work being done in quality management.

Furthermore, using QUALITEST, a destination can benchmark itself with other destinations with a similar location and level of tourism. In an open benchmarking process, one organisation compares its business performance with another organisation in the same line of business. This form of comparison reveals strong points as well as weaknesses. Where a weakness has been identified, the organisation can then identify what the other organisation is doing to achieve a better business performance – so-called good practice – and then implement this good practice itself. QUALITEST provides a set of indicators that can be used to measure quality performance in tourist destinations. Destinations can then compare their indicator results with those of similar destinations to identify strong points and weaknesses. Similarly, where one destination identifies a weakness, it can then communicate with a better performing destination to identify what they are doing – the good practice – and then implement these activities itself. More information on how destinations can organise their work with QUALITEST to promote benchmarking between destinations is given in section 2.

To conclude, working with QUALITEST will give your destination:

- A set of indicators that can be used to measure the effects of quality management on the overall level of tourism quality in the destination and to monitor developments over time,
- An opportunity to see the linkages between the various aspects of quality in the destination, to the tourists' perception of quality in the destination,
- A means of communicating quality performance to other stakeholders in the destination, and
- A tried and tested set of indicators that can be used for benchmarking with similar destinations.

What's in it for tourist services?

There is a long tradition of working with quality within single sectors of the European tourism industry. This is primarily due to the star rating schemes that have been developed to classify individual tourist services, such as accommodation and restaurants, on the basis of pre-defined quality criteria. However, rating schemes only provide a list of quality criteria that should be in place, and do not give a comprehensive, systematic means of monitoring quality performance or improvement over time.

The QUALITEST study identified a range of quality management programmes developed specifically for tourist services. These differ to rating schemes in that they aim to promote a culture of quality management in an individual tourist service. The majority are based on ISO 9000, which is an international quality management standard. A comparative analysis of three of the individual quality management programmes identified is presented in Annex 4, together with a brief description. Their contact details are given in Annex 6.

As mentioned previously, the QUALITEST tool was developed using the life cycle of a typical holiday experience. The tool therefore focuses on the service points that occur throughout this lifecycle, and incorporates them into the indicators. During the study, the ten test destinations were asked to rank the ten most important sectors in their local tourism industry for the quality of tourism in the destination. The results are presented below, and these tourist and transport services have been focused on in the development of the QUALITEST tool.

1	2	3	4	5	6	7	8	9	10
Hotels	Transport	Eating & drinking	Commercial tourist attractions	Sporting & recreational activities	Non-serviced accommo-dation	Campsites	Retail	Serviced accommo-dation	Rented rooms

Hotels and transport services rank as the most important tourist services that have an influence on the quality of tourism in the destination. Rented rooms were least interesting, possibly because there is a relatively low tourist flow in this sector, and it lacks resources to promote comprehensive quality management.

So how can a tourist service benefit from QUALITEST? There are a number of reasons why QUALITEST is just as relevant for tourist services as it is for destinations.

Firstly, the QUALITEST tool is actually built on data supplied by the tourist services and transport services within the destination. The destination manager then aggregates this information at the destination level to provide the indicators. This means that the QUALITEST tool contains a range of specific quality information that tourist services should be measuring. Without measuring these aspects, it's impossible to document progress towards increased efficiency and competitiveness in a business.

Secondly, the QUALITEST tool makes the work being done on tourism development in the destination more transparent. It requires that there are management initiatives in place that can give tourist services a line of communication to the destination management, which can be used to influence the decision making process. Furthermore it makes the destination management accountable because if the indicators are used in a reporting process, the results of the destination management over time are made visible to the tourist services in the destination.

Finally, if benchmarking is taking place, tourist services can compare the quality performance of the sector that they belong to, for example "accommodation" or "eating and drinking", with the quality performance of the equivalent sector in a similar destination.

To summarise, working with QUALITEST in the destination will benefit tourist services because:

- It promotes continued improvements in the overall quality of tourism in the destination, and ultimately secures market share – which means a continued stream of customers through their door.
- It presents the type of information that tourism and transport services should be sending to the destination manager for an effective management of the destination – for example total number of overnights and occupancy rates.
- It also gives them an idea of the things that should be happening in their destination to ensure a sustained quality management – they can then use this to lobby the destination manager or the public authority to generate increased transparency and to start activities in the destination.

Return on investment

The investment needed to work with QUALITEST in a destination will largely depend on the destination's level of ambition, and how much work has already been done. This will have a direct effect on the amount of data that is available in the destination already, and therefore the amount of legwork needed to start working with the indicators.

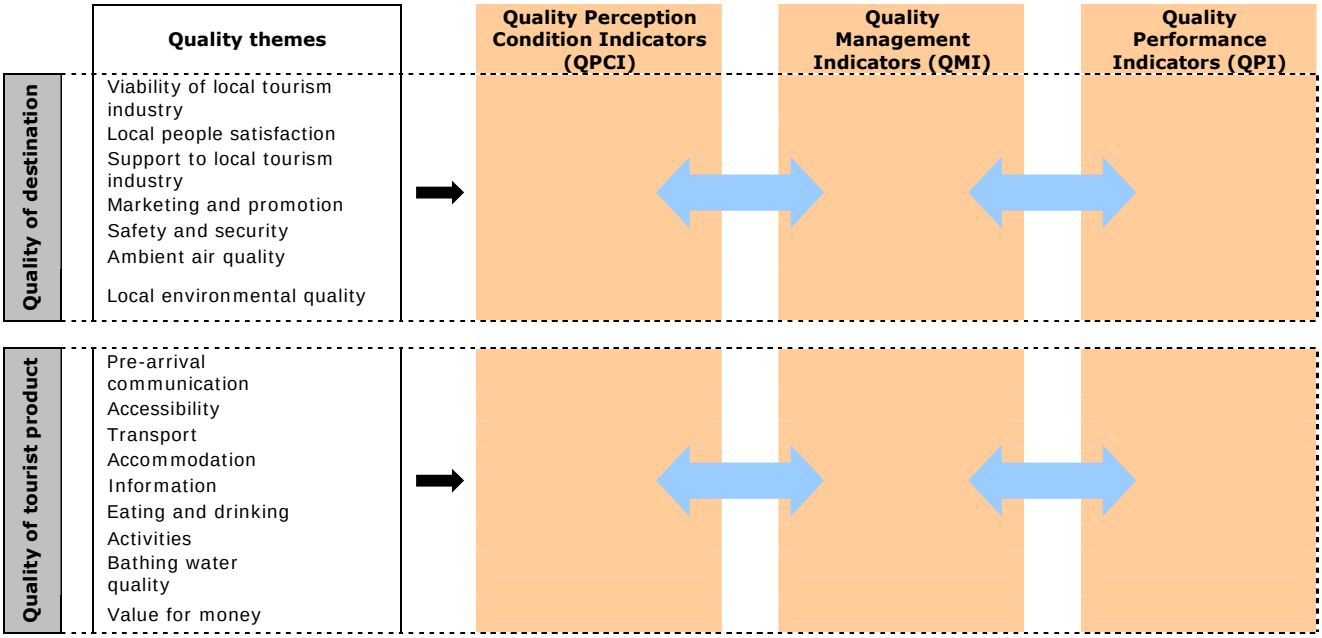
Implementing a new system in the destination management will inevitably require a relatively high resource input in the first year but after this the system will be in place and should be used automatically by the destination. Using the QUALITEST tool is therefore a strategic step for a destination and will of course involve an investment of time and resources. However, this investment is counter-balanced by the benefits brought to the sustainability of the destination, in terms of increased consumer satisfaction, and an improved competitive standing for the destination, in other words bringing a good return on investment.

Section 2. QUALITEST and Quality Performance Evaluation

QUALITEST is a tool for the Quality Performance Evaluation of tourist destinations. The aim of this section is to describe in detail the components of the QUALITEST tool, and how it can be used by a destination to evaluate its quality performance.

QUALITEST

The diagram below displays the QUALITEST tool.



QUALITEST consists of 16 quality themes divided into two main groups: Quality of the destination and Quality of the tourist product. The first group provides information on the background quality of the destination – the essential aspects that play a key role in the function of tourism in a destination, and must be in order. The second group provides information on the quality of the tourist product itself, as

seen through the eyes of the tourist, and is based on a breakdown of the activities taken during the life-cycle of a typical holiday.

Each quality theme gives rise to a set of three indicators: Quality Perception Condition Indicators (QPCI), Quality Management Indicators (QMI) and Quality Performance Indicators (QPI). The indicators are interlinked, reflecting the integrated approach to quality management that is essential in tourist destinations.

Quality Perception Condition Indicator (QPCI)

These are the entry point for quality management in the destination and show the levels of satisfaction felt by the tourists and the local tourism industry professionals with different quality aspects of the destination. The QPCI are obtained via a Tourist Satisfaction Survey and Tourism Industry Survey and are based on subjective opinion. These indicators cover the main reason for the destination manager to work with an integrated quality approach – i.e. to boost tourist satisfaction, to improve the well-being of the tourism industry and to increase local peoples' satisfaction with tourism in their destination. Finally, there are also indicators of environmental quality. If there are problems with the results of any of these indicators, for example a worsening of the result in comparison to previous years or a poor performance in comparison to similar destinations, then the destination manager needs to look at the corresponding QMI and QPI indicators to see what those indicators tell, and then take the actions necessary to improve things. After action has been taken, the destination manager should update the QPCIs to check if the desired result has occurred.

Quality Management Indicator (QMI)

These indicators are directly related to the QPCIs and are qualitative, i.e. they are not built on numerical data. They are used to signal how well the quality work is anchored in the destination management. These qualitative indicators form a type of "self-assessment" because they determine whether a range of the management activities essential for successful IQM are in place or not in the destination. The QMIs are important because they cover much of the basic communication between the destination manager and the destination stakeholders, for example via local tourism associations, which is the key to successful IQM.

Quality Performance Indicator (QPI)

These indicators are quantitative and form an objective counterpart to the QPCI. The QPI are again linked to a relevant QPCI and QMI for each quality aspect. The majority of the QPIs in QUALITEST relate the main quality aspect being measured to another parameter, for example time or area. This enables the QPI to indicate progress over time or effectiveness. If an absolute indicator were used, this would not be achievable. This can be seen in the QPI for transport in the destination, where the main information being presented is complaints:

Number of complaints on reliability of public passenger transport in destination per 100 000 passengers

Here the number of complaints has been related to the number of passengers transported. This has several advantages. Firstly, giving an absolute figure for the number would have little meaning, as it does not show the development behind the indicator. For example the number of absolute complaints might have fallen but the number of passengers might also have fallen, meaning that the ratio between complaints and passengers was the same, and no improvement in quality improvement has been achieved. Secondly, the relative indicators represent a measurement of effectiveness of the destination in its qual-

ity management, e.g. the transport QPI might show that for every 100 000 passengers transported, the transport services registered ten complaints. To become more effective, the transport services would have to reduce the number of complaints per 100 000 passengers.

It is also possible to make measurements of efficiency using the QPIs. In this case the main quality information being measured is related to financial information. This can be seen in a potential QPI for the marketing and promotion of the destination:

Marketing costs per overnight stay (EUR)

This is basically a measure of how much each overnight stay in the destination cost in terms of marketing. In other words a measurement of how efficient the destination is at attracting tourists per Euro spent on marketing.

The QPIs used in the QUALITEST tool are intended to be measurements of effectiveness. Nonetheless, a destination may decide to supplement these indicators with efficiency indicators if necessary.

Quality Performance Evaluation

QUALITEST is a tool to facilitate the Quality Performance Evaluation (QPE) of tourist destinations. QPE is a process to facilitate management decisions regarding a destination's quality performance by:

1. **Measuring** and completing the Quality Perception Condition Indicators, the Quality Management Indicators and Quality Performance Indicators,
2. **Monitoring** the results over time, and
3. **Benchmarking** results against those from similar destinations.

By working through these steps, the destination manager has evaluated the quality of tourism in the destination. However, quality management is a cyclical process, therefore the evaluation process needs to begin again by updating the QPCIs and monitoring the QMIs and QPIs on a regular basis.

Measuring

QPE in a destination begins by measuring the tourists' perceptions of the destination's quality condition using Quality Perception Condition Indicators (QPCIs). The next step measures how well the quality approach is anchored in the destination management using the Quality Management Indicators (QMIs). Finally the destination manager can measure the concrete performance of the destination quality using the Quality Performance Indicators (QPIs).

Monitoring

The destination should record the results achieved from measuring the three indicator types and use the information internally to monitor quality progress in the destination over time. This activity involves comparing the quality indicator results with those of previous years to identify trends and significant discrepancies in quality levels.

Benchmarking

It is envisaged that destination managers will compare their destination's quality performance with that of similar destinations within a network of tourist destinations, paving the way for dialogue and the exchange of good practices. There are many definitions of benchmarking but in practice it usually encompasses:

- Regularly comparing aspects of performance (functions or processes) with best practitioners;
- Identifying gaps in performance;
- Seeking fresh approaches to bring about improvements in performance;
- Following through with implementing improvements; and
- Following up by monitoring progress and reviewing the benefits[3].

Benchmarking the quality performance of tourist destinations is a relatively new phenomenon, and much pioneering work has been done in England through the work of the National Tourism Best Value Management Group (NTBVG). Best Value was introduced by the 1999 Local Government Act. It is a comprehensive means of measuring whether or not local authorities are delivering value for money and standards of quality that meet the needs of local people. Local authorities have a duty under the act to review all of their services over a five year period and to seek continuous improvement in service delivery, including tourism. The Audit Commission is empowered to carry out detailed inspections of completed reviews to monitor standards and seek out poor performance. QUALITEST has benefited from the work of the NTBVG (see section 3), and more information on NTBVG is available in Annex 5.

Experience shows that external benchmarking is not only a competitive activity but can also be collaborative. Even the best performing destinations will be able to learn from collaboration with other destinations and in a rapidly evolving industry like tourism, best practice changes all the time. Benchmarking is not a one-off activity but needs to be repeated at regular intervals so as not to fall behind as the background environment changes. Finally, benchmarking does not equate with spying and espionage – it is vital to be open and honest about performance levels to maximise the potential benefit.

Benchmarking can be facilitated via networks of tourist destinations. The destinations should be of similar size and geography, and also have roughly the same tourism volume. The networks could be in clusters – for example a network of tourism destinations in the Aegean Sea, or they could be more diffuse, for example a network of European ski destinations. Either way, it is likely that a mix of meetings and information technology will have to be used to facilitate communication. Issues of leadership, data management and resources will also need to be solved before successful networking can begin. It is recommended that destinations benchmark themselves on the results of their Quality Performance Indicators and Quality Performance Condition Indicators. Where significant differences are identified in the results, the destinations can check the Quality Management Indicators of a successful destination to identify good practice, and can also start a dialogue with that destination to get more detailed information.

The data gathered by the destinations in the benchmarking network can be handled using different mathematical methods to calculate the benchmark values. These could be either the average, median or the standard deviation. The most common value used in benchmark analyses is the average value. It requires that the data delivered by the destinations is summed together and divided by the number of destinations delivering that data. As an example, the four coastal destinations in the study produced a benchmark of 12 for the bathing water quality QPI. This means that on average, 12% of the bathing areas in the coastal destinations did not comply with the mandatory values in the EU Bathing Water Quality Directive.

Averages are a relatively easy concept to understand and calculate, but the result can be adversely affected by one or two high data entries, leading to a skewed value. Using the median, which is the middle value of the data supplied by the destinations, this adverse effect can be avoided. The median can be calculated automatically by entering the data into a spreadsheet, selecting the relevant data and request-

ing the median function. The standard deviation is a further alternative. It is basically a measure of the dispersion of a frequency distribution. Again it can be calculated automatically by entering the data into a spreadsheet, selecting the relevant data and requesting the standard deviation function. As an example, the standard deviation was calculated for average room occupancy rate per month in the four rural destinations in the study, as a potential QPI for quality of welcome. The standard deviation values returned were then averaged to give a benchmark value of 11. This QPI attempts to indicate the seasonality of the tourist season. The higher the standard deviation in room occupancy rates throughout the year, the more intense the peak, and the more heavy the load on the local community. To achieve quality improvements, the destination manager should seek to reduce the standard deviation figure, signifying a lower dispersion.

Section 3. A Roadmap for QUALITEST

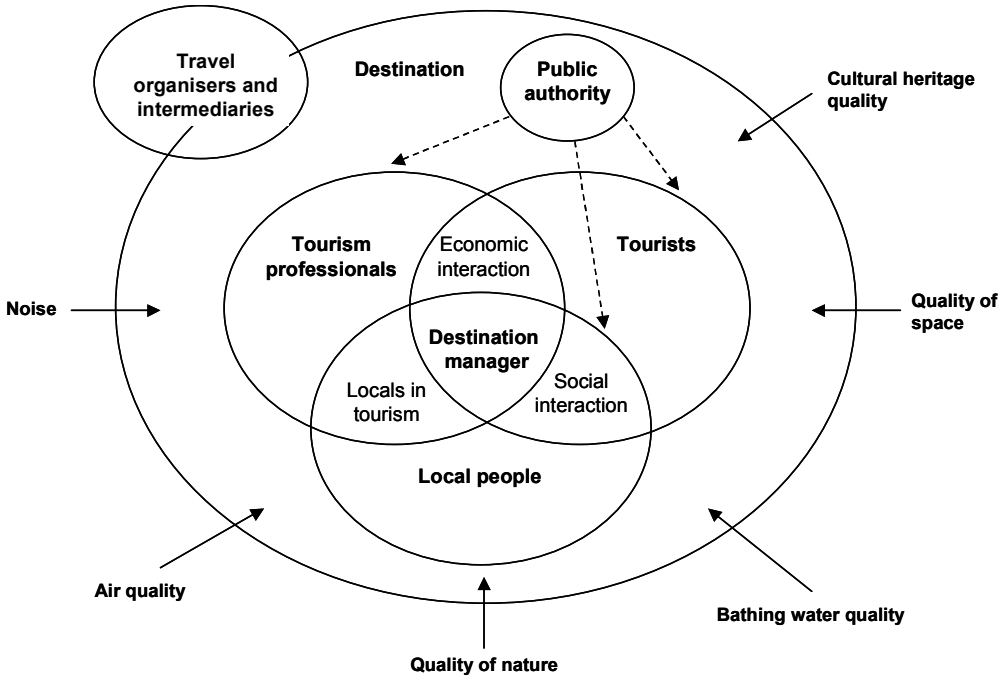
This section provides a basic roadmap of how a tourist destination can go about using the QUALITEST tool in practice. It also provides some "golden rules" for its successful application.

The following steps are necessary for use of the QUALITEST tool, and should be repeated in a cyclical manner in the destination, to achieve continual quality improvement:

1. Define the destination,
2. Carry out the Tourist Satisfaction Survey,
3. Develop the Quality Perception Condition Indicators,
4. Develop the Quality Management Indicators,
5. Carry out the Tourism Industry Survey,
6. Develop the Quality Performance Indicators,
7. Monitor results internally, and
8. Benchmark with similar destinations.

1. Define the destination

Defining the geographical boundaries of the destination itself is a key activity, leading to feelings of identity with, and ownership of, the destination by tourism stakeholders in the region. For practical reasons, it's a good idea if the destination boundaries closely follow the municipal boundaries – this will facilitate political cooperation and ease of data collection later in the process. A tourist destination is best explained as an area which is separately identified and promoted to tourists as a place to visit, and within which the tourism product is coordinated by one or more identifiable authorities or organisations.



A destination may in theory vary from an area within a local council to an area spanning several municipalities but the central issue is that it has its own identity, and ideally responsibility for its management has been determined, i.e. there is a destination manager in place. The identity of the destination manager will vary from destination to destination, as will their work mandate for managing tourism in the destination but some form of coordination is essential for the successful use of the QUALITEST tool. The diagram above attempts to illustrate the destination manager's relationship to the various stakeholders in the destination, and how the various quality aspects influence the destination. The large circle represents the destination itself.

As the responsible co-ordinator, the destination manager sits in the middle of the destination circle, and is at the midpoint of three overlapping circles representing the "human" components of the Integrated Quality Management (IQM) concept for tourist destinations: tourists, local people and tourism industry professionals. There are flows and interactions between each of these circles, and the destination manager is really the anchor point for these interactions. A fourth circle is also drawn within the destination circle – the public authority. It stands alone because the authority is also often present in the three other circles, the tourism professionals (via public:private cooperations), the local people and the destination manager. The destination manager is typically an employee of the local authority because they have the resources necessary to take an active role in the planning of tourism in their area, and therefore often function as the catalyst for change. However, the complexity of the tourist experience, which is a fusion of exposure to many different phenomena in the destination, means that the public and private sectors are interdependent for the successful quality management of the destination, and all need to take an active role. The IQM publications give good advice on organising the quality management process in tourist destinations, and state that a Lead Authority must be identified before the IQM process can begin.

On the outside of the destination, the quality flows that can also affect the quality of tourism in a destination are depicted – for example noise, bathing water quality and the quality of nature. It can be seen that these aspects are common to all in the destination, whether or not they work in the tourism industry or are tourists, and improving these elements will therefore contribute to improving the overall quality of life in the destination. A separate circle, intersecting the parameter of the destination circle, is used to depict the travel organisers and intermediaries that, depending on the destination, may play a significant

role in the packaging of the tourist product and its marketing outside of the destination. It intersects the circle because travel organisers and intermediaries are often represented in the destination, and may take an active part in the management process.

The circle diagram is of course an over-simplified presentation of reality but of use in visualising the links between the stakeholders in the destination and their relationship to quality. Following the IQM concept, the role of the destination manager is to bring together the stakeholders in the destination and facilitate a constructive process whereby their inputs on the quality of tourism in the destination can be gathered. The IQM publications contain detailed information on organising destination management for IQM – see Annexes 3 and 6 for more information on the IQM model and how to obtain these reports.

2. Carry out the Tourist Satisfaction Survey

The Tourist Satisfaction Survey is one of the most important activities within the QUALITEST tool. Surveys of tourist satisfaction should be regularly carried out in all tourist destinations, regardless of size, or the volume of their tourism industry. A tourist satisfaction survey generates a wealth of information that is vital for managing and evaluating the quality performance of a tourist destination, for example tourist satisfaction levels, and their motivations for staying in the destination.

The Tourist Satisfaction Survey used in QUALITEST is adapted from work done by the National Tourism Best Value Management Group in England (see Annex 5). It is specifically designed to provide the data necessary for 13 of the Quality Perception Condition Indicators for use in QPE, including benchmarking between destinations (see section 2 above). As such it is a very basic survey, and must be further adapted to fit the needs of a specific tourist destination. It would be a wasted opportunity, as well as a waste of resources, to initiate a large-scale tourist survey and then only ask 15 questions. It is therefore recommended that individual destinations further develop the Tourist Satisfaction Survey to incorporate one or more of the elements below:

- Generation of background information on the person answering the questionnaire. This should at least include their country of origin, and form of accommodation in the destination (campsite, hotel etc.). Using this information, the results from the questionnaire can be correlated to find out if there are any patterns behind the answers given.
- Information on motivations for staying in the destination. This should include where and how they learnt of the destination, as well as the specific “pull factors” that attract them to the destination. Furthermore an investigation could be made into the more abstract values that tourists associate with the destination, for example “peace and tranquillity”, “cultural heritage” or “adventure”.
- Behavioural patterns during their stay in the destination. One central point of interest is expenditure – tourists could be asked to identify their average expenditure per day, including accommodation. Another relevant topic is means of transport to the destination, i.e. car, train, coach or flight.
- Recommendations for further efforts to boost the quality of the destination. The tourists will most likely have some good ideas for how to improve the quality of the tourist destination, either in general or linked to the 13 specific questions – adequate space should therefore be given to the tourist to enable them or their interviewer to note recommendations.
- Finally, it would be valuable to ask return tourists in more detail about their attachment to the destination. This is a vital group for any tourist destination because winning new tourists is more expensive than keeping the regular tourists and getting them to return again and again. It also provides basic data that will assist in the making of key management decisions.

The basic Tourist Satisfaction Questionnaire used in QUALITEST is presented below.

QUALITEST TOURIST SATISFACTION QUESTIONNAIRE						
PLEASE INDICATE IF YOU:					Yes	No
Are staying in accommodation in the destination (if yes, please proceed with questionnaire)					☐	☐
Have stayed in the destination on previous occasions					☐	☐
PLEASE INDICATE YOUR LEVEL OF SATISFACTION WITH THE FOLLOWING:	Excellent	Good	Satisfactory	Poor	Very poor	Not applicable
Quality of communication on the destination received pre-arrival	☐	☐	☐	☐	☐	☐
Standard of transport services in the destination	☐	☐	☐	☐	☐	☐
Quality of accommodation used	☐	☐	☐	☐	☐	☐
Range and quality of things to do	☐	☐	☐	☐	☐	☐
Range and quality of places to eat and drink	☐	☐	☐	☐	☐	☐
Accessibility to tourist services	☐	☐	☐	☐	☐	☐
Quality of information on things to do in the destination	☐	☐	☐	☐	☐	☐
Feeling of security and safety from crime, including availability of health services	☐	☐	☐	☐	☐	☐
Value for money in general	☐	☐	☐	☐	☐	☐
Friendliness of the local population	☐	☐	☐	☐	☐	☐
Cleanliness of the local environment	☐	☐	☐	☐	☐	☐
Cleanliness of bathing areas	☐	☐	☐	☐	☐	☐
Quality of air in the destination	☐	☐	☐	☐	☐	☐

It should be emphasised that the target group for this survey is tourists, i.e. visitors that spend at least one overnight stay in the destination. Day visitors are not included in the QUALITEST tool and therefore need to be excluded from this survey. This can be achieved by asking the person interviewed if they are staying at accommodation in the destination or are just visitors. Alternatively a simple yes/no answer at the beginning of the questionnaire will determine if the individual can be classified as a tourist.

In order to provide the scores used in 13 of the Quality Perception Condition Indicators, it is necessary to ask tourists to categorise their impressions of quality in the destination into one of six categories, ranging from " very poor" to "excellent". If a response is registered as "good" or "excellent", then these scores can be used to develop the QPCI for that given aspect, which is always "percentage of tourists more than satisfied with…".

It will only be possible to ask a fraction of the tourists that visit the destination to answer the survey. It is therefore important that those tourists form as representative a sample as possible of the overall tourism volume in the destination. The following steps are recommended to achieve this:

- As a rule of thumb, at least 3% of the total number of tourists visiting the destination in a given year should be surveyed. But this precise figure is difficult to calculate and set as a target for the survey, if the number of tourist arrivals is not known.
- Therefore, for destinations where the precise number of tourist arrivals is not known, and for small destinations, a second rule of thumb is that at least 100 tourists should answer the questionnaire, to enable the development of comprehensive and correct statistics based on the questionnaire answers.
- For this sample to be representative, the distribution of tourists answering the questionnaire needs to reflect the distribution of the market segments in the destination, for example camping site guests,

foreign guests or families with children. This again reflects the need to expand the survey to enable the generation of background information on the person answering the questionnaire, as well as underlining the importance of the data given by the Tourism Industry Survey (see below).

- If the distribution of the market segments is not known in detail it will be difficult to check if the survey is representative. However, a third rule of thumb states that the survey then needs to be carried out in a random manner, which can be done by giving the questionnaire to every fifth person entering a Tourist Information Centre in the destination.

Feedback from the destinations in the study clearly indicates that the Tourist Satisfaction Survey presented above has a good structure and provides some very useful information on the quality condition of the destination. Some good advice is to:

- Ask the tourist services in the destination to help to distribute the questionnaire to their customers.
- Encourage the tourists to respond – people are generally tired of answering surveys – provide some good arguments why they should take the time to answer your questionnaire, perhaps even a prize draw.
- Encourage the tourist services to promote the survey to their guests by giving a weekly prize to the organisation that sends back the most completed questionnaires.
- Leave space on the questionnaire for the tourists or the interviewers to insert additional comments – for example specific experiences that the tourists have had which were less than satisfactory.
- Get the timing right – don't start the survey in the middle of the tourist season.

3. Carry out the Tourism Industry Survey

The Tourism Industry Survey is an essential component of a destination's evaluation of its quality performance, and must be taken seriously – it is part of the commitment to quality and covers information that the destination manager needs to know. The Tourism Industry Survey is based on two questionnaires conducted simultaneously in the destination. One questionnaire covers the accommodation stock; the other is targeted at the remaining tourist services and transport services. The Tourism Industry Survey provides key information for developing the QPIs, and allows the destination manager to gauge the satisfaction levels of local tourism industry professionals. The Tourism Industry Questionnaires used in the QUALITEST tool are adapted from work done by the NTBVG in England (see Annex 5). The basic questionnaire for accommodation stock in the destination is presented below as an example.

The Tourism Industry Survey has been specifically designed to provide the background data necessary for the Quality Performance Indicators, as well as for three of the Quality Perception Condition Indicators for use in QPE, including benchmarking between destinations (see section 2 above). As such it is a very basic survey, and must be further adapted to fit the needs of a specific tourist destination. A destination may wish to extend the number of questions asked in the questionnaire to make best possible use of this activity. Other issues, for example tourism industry satisfaction levels with specific quality issues in the destination could then be covered.

QUALITEST TOURISM INDUSTRY QUESTIONNAIRE (Accommodation stock)													
PLEASE INDICATE YOUR TYPE OF ACCOMMODATION ESTABLISHMENT:													
Hotel	☐												
Holiday dwelling	☐												
Tourist campsite	☐												
Marina	☐												
Health establishment	☐												
Work and holiday camp	☐												
Conference centre	☐												
Other – please specify													
PLEASE INDICATE WHETHER YOUR ESTABLISHMENT IS:	Yes	No											
Awarded with a label from an accessibility labelling scheme	☐	☐											
Able to cater for the needs of tourists with impaired mobility	☐	☐											
Assessed according to an accommodation rating scheme	☐	☐											
Awarded an ecolabel or environmental diploma	☐	☐											
Certified according to a quality or environmental management standard	☐	☐											
PLEASE INDICATE IF YOUR ESTABLISHMENT HAS:	Yes	No											
Made one or more successful applications for business support in the past year	☐	☐											
The name(s) of the business support applied for													
PLEASE INDICATE CAPACITY OF YOUR ESTABLISHMENT:													
Total number of bedrooms													
Total number of bedspaces													
Total number of overnight stays in 2002													
PLEASE INDICATE ROOM OCCUPANCY RATE PER MONTH IN 2002:													
1	2	3	4	5	6	7	8	9	10	11	12	Average	
%	%	%	%	%	%	%	%	%	%	%	%	%	
FOR STAFF PLEASE ENTER:													
Number of employees (man-months)													
Amount of funding you have invested in training and qualification of employees (EUR)													
Amount of funding invested by other organisations in training and qualification of employees (EUR)													
PLEASE INDICATE YOUR SATISFACTION WITH THE FOLLOWING:	Excellen	Good	Satisfactory	Poor	Very poor								
How was business last year compared to the previous year?	☐	☐	☐	☐	☐								
Overall marketing and promotion of the destination	☐	☐	☐	☐	☐								
Business support opportunities offered e.g. training and funding	☐	☐	☐	☐	☐								

In order to provide the scores used in three of the Quality Perception Condition Indicators, it is necessary to ask tourist and transport services to categorise their impressions of quality in the destination into one of six categories, ranging from " very poor" to "excellent". If a response is registered as "good" or "excellent" then these scores are used to develop the QPCI for that given aspect, which is always "percentage of tourists more than satisfied with…".

The Tourism Industry Questionnaires should only be sent to the tourist and transport services in the destination. It should only be filled out once per establishment, and only by the management of the establishment. Several methods can identify the organisations that should receive a questionnaire:

- Use telephone and commercial directories, for example look under "hotel".
- Local and national business associations can identify members in the destination.
- Ask the local Tax Office(s) to provide contact details for registered tourism companies.

- Tourism business networks or associations can distribute the questionnaire to their members.

Once they have been identified, the Tourism Industry Questionnaires can be sent to the tourist and transport services in the destination. It is arguably best to send the questionnaires in the post, so that the companies have a hard copy in front of them. Nonetheless, tourism companies are very busy, and the destination manager should then call those tourist services and transport services that have not responded, and remind them to fill in and return the questionnaire. Some companies might prefer to respond to the questionnaire on the phone, others might prefer email. As mentioned previously, the Tourism Industry Survey is an essential component of the quality management process in a destination, and it is necessary to aim for a high rate of return. It is therefore vital that the destination manager is supported in this initiative by other prominent stakeholders in the local tourism industry, giving it a "top stakeholder commitment". At the same time, small prizes can be offered to encourage return.

The questions asked in the Tourism Industry Survey can basically be divided into two categories: subjective and objective. The objective questions, for example the number of overnight stays in the accommodation service, gather information for use in the development of the QPIs. The subjective questions gather data for use in the development of the QPCIs, for example satisfaction with the marketing of destination. As a rule of thumb, it is important to aim for a rate of return of 50% of the questionnaires, although the higher the better. If the rate of return is below 50%, then the question needs to be asked why it is so low. There might be a straightforward reason for this, for example the questionnaire has been sent to the wrong people in the respective companies.

In the case of the subjective questions, if the rate of return is 50% or higher, then there is a fair chance of getting a representative sample, as long as the 50% of the local tourism industry that has answered looks pretty much the same as the 50% of the local tourism industry that hasn't answered. Here the destination manager will have to rely on experience and common sense to assess if this is the case or not. In the case of the objective questions, then a 100% rate of return is best, because via these questions the destination manager can build a picture of the entire destination, and here there can't be a representative answer. For those companies that haven't answered, estimates should be made of their objective data based on similar companies (see 6. Develop the Quality Performance Indicators).

4. Develop the Quality Perception Condition Indicators

The QPCIs are developed using the response to the 13 satisfaction questions asked in the Tourist Satisfaction Questionnaire and the three satisfaction questions asked in the Tourism Industry Questionnaire.

5. Develop the Quality Management Indicators

The Quality Management Indicators are very much concerned with the work of the destination manager, and many of the qualitative QMI will be answerable by that person or organisation.

6. Develop the Quality Performance Indicators

The QPIs are developed from the results of the Tourism Industry Survey and from an additional data investigation conducted by the destination manager. The results of the Tourism Industry Questionnaires are primarily used to develop the variables for the relative indicators, for example total number of overnights in destination. It will not be realistic to achieve a 100% response rate to the Tourism Industry Survey. It will therefore be necessary to estimate data for those establishments not responding. Estimates can either be made by looking at similar establishment to the ones that did not supply data and using a rule of thumb to estimate missing data, or to ask representatives from branch associations to

provide estimates. The other information needed to generate the QPIs is likely to be available at a variety of different sources including the planning department at the local authority, local police and the environmental agency.

7. Monitor results internally

The destination should monitor its results achieved in the QPCIs, QMIs and QPI over time, to identify any potential problem areas for further action. It is anticipated that the monitoring process should take place at least once a year in a destination. If there are areas that require further action to improve quality, then the destination needs to identify relevant actions for implementation. If the destination has developed a central tourism strategy for tourism development in the destination, then the strategy would be the right place to document the results and the actions needed to improve quality. If the destination does not have a central tourism strategy, then the results of the monitoring process can be communicated to stakeholders via an annual destination report that is either printed or available on the internet. Monitoring and communication also provide valuable documentation to the destination manager if it's necessary to argue for increased investment in quality management in the destination.

8. Benchmark with similar destinations

In the concluding phase of the Quality Performance Evaluation, the results of the QPCIs and QPIs can be benchmarked externally. In the external benchmark, a destination can compare its results in the QPCIs and QPIs to those of other destinations. Taking the benchmarking process a step further, the destinations could exchange information on quality management in a networking process that would help breakdown barriers to the exchange of information on QPE (see section 2).

Five golden rules for best value in QPE

The user should bear the following five points in mind when working with the QUALITEST tool:

1. Try to use the same procedure each year to acquire data. If this is not done, the comparability of the data between different years may suffer.
2. Be thorough in the data processing phases – it can be beneficial to use the data processing software currently available.
3. Be as honest as possible – it's only yourself that is being deluded by using misleading data.
4. Make sure that all the indicators are valid for the same period of time – i.e. registrations made from January to December in a given year.
5. Remember to put in a quality control to identify potential mistakes in the data handling process.

And finally...

It is recommended that potential users of the QUALITEST tool read the relevant Integrated Quality Management publication for their type of destination (rural, coastal or urban) before proceeding to use the tool (see Annex 3). These reports form the methodological framework for the QUALITEST tool, and provide detailed information on how to go about quality management in tourist destinations based on good practice examples throughout Europe.

Importantly these publications give good advice on how to "anchor" the quality management process in the destination by facilitating a networking process that gathers key stakeholders around a common table. They also contain detailed information on how to plan, implement and follow-up on concrete quality management activities in tourist destinations. Furthermore they provide the reader with recommendations on how to get started with helpful tips to help you on your way.

The IQM publications, in different languages, can either be obtained as brochures from the Tourism Unit of Enterprise DG, or can be downloaded from it's website (see Annex 6).

Section 4. The QUALITEST

This section presents the QUALITEST tool, comprised of 16 headline indicators.

	Quality themes	QPCI	QMI	QPI
Quality of the destination	**Viability of local tourism industry**	Percentage of local tourism industry professionals more than satisfied with business last season in comparison with the previous season	Networking and communication between the destination manager and the tourism industry in the destination is facilitated and functions effectively (Yes/no)	Percentage growth of the tourism industry in the destination
	Support to local tourism industry	Percentage of local tourism industry professionals more than satisfied with the business support opportunities offered in the destination	A programme is in place to coordinate business support to tourist services and transport services in destination, and its success is regularly evaluated (Yes/no)	Rate of successful business support applications made by the local tourism industry
	Marketing and promotion	Percentage of local tourism industry professionals more than satisfied with the quality of marketing and promotion of the destination	The destination has formally approved a tourism strategy, which contains clear directions on which to base marketing, and this is regularly checked (Yes/no)	Number of overnight stays per Euro invested in marketing and promotion of the destination
	Quality of welcome	Percentage of tourists more than satisfied with the friendliness of the local population	A procedure is in place for regularly receiving feedback from local people on their opinion of tourism in the destination and this is taken into account (Yes/no)	Tourist season pressure on the destination
	Safety and security	Percentage of tourists more than satisfied with the feeling of security and safety (including availability of health services)	A crime prevention initiative is in operation in the destination, involving the tourist services and transport services, and its operation is evaluated (Yes/no)	Ratio of criminal acts involving crime against the person to number of local inhabitants
	Ambient air quality	Percentage of tourists more than satisfied with the quality of air in destination	Information on ambient concentrations of air pollutants is routinely made available to the public (Yes/no)	Number of days with high air pollution levels
	Local environmental quality	Percentage of tourists more than satisfied with the cleanliness of the local environment	Responsibilities for managing the cleanliness of the destination have been clearly identified and the effectiveness of their operation is regularly evaluated (Yes/no)	Ratio of litter gathered to the area of the destination
Quality of the tourist product	**Pre-arrival communication**	Percentage of tourists more than satisfied with the quality of communication about the destination received prior to arrival	Significant market segments are known and their expectations are regularly assessed via market surveys (Yes/no)	Tourist complaints registered per overnight stay
	Accessibility	Percentage of tourists with disabilities and limited mobility more than satisfied with accessibility to tourist services in the destination	The destination is aware of the needs of tourists with disabilities and limited mobility, and regularly raises awareness of why, and how, tourist services can be made more accessible (Yes/no)	Percentage of tourist services suitable for, and accessible by, disabled people and people of limited mobility
	Transport	Percentage of tourists more than satisfied with the transport services in the destination	All transport services in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Ratio of complaints on the reliability of public passenger transport in the destination to number of passengers
	Accommodation	Percentage of tourists more than satisfied with their accommodation	All accommodation providers in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Percentage of collective accommodation certified according to a Quality Management System (QMS), Environmental Management System (EMS), or ecolabelling programme
	Information	Percentage of tourists more than satisfied with the quality of information on things to do in the destination	Information material provided to tourists on things to do in the destination is regularly checked, as well as the means of its provision (Yes/no)	Ratio of overnight stays per visit to the TICs in the destination
	Eating and drinking	Percentage of tourists more than satisfied with the quality of places to eat and drink in the destination	The quality of the places to eat and drink in the destination is regularly evaluated, and there is a procedure in place to register complaints from tourists	Number of complaints on the quality of places to eat and drink in the destination per overnight stay
	Activities	Percentage of tourists more than satisfied with the range and quality of things to do in the destination	All tourist attractions in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Number of things to do within a ½ day's travel of the destination per overnight stay
	Bathing water quality	Percentage of tourists more than satisfied with the cleanliness of the bathing areas in the destination	There is a an integrated management plan in place that covers the bathing areas in the destination and its operation is regularly evaluated (Yes/no)	Percentage of bathing areas not complying with the mandatory values in the EU Bathing Water Directive
	Value for money	Percentage of tourists more than satisfied with value for money in general	The destination has developed and formally approved a tourism strategy and it is reviewed regularly (Yes/no)	Percentage of return tourists

Viability of local tourism industry

QPCI:	**QMI:**	**QPI:**
Percentage of local tourism industry professionals more than satisfied with business last season in comparison with the previous season	Networking and communication between the destination manager and the tourism industry is facilitated and functions effectively (Yes/no)	Percentage growth of the tourism industry in the destination

Significance

The term tourism industry is used to cover a multitude of different tourist services, which fuse to form the identity of tourism in the destination. It's vital that the destination manager monitors the economic viability of the tourism industry in the destination. This ensures that the tourist services are continuing to be competitive, and also ensures that the destination maintains it's fundamental identity. The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures the satisfaction of the local tourism industry with the business climate in the destination.
- It's sound management to establish a forum where the local tourism industry can meet and give feedback to each other and to the destination management. The QMI determines whether such a forum exists or not in the destination, and whether it functions effectively and according to plan. If there is no such forum, then steps should be taken to encourage its establishment and operation.
- The QPI indicates the year on year percentage rise and fall in the net number of tourist services in the destination.

Components

- QPCI: (Number of local tourism industry professionals in Tourism Industry Survey more than satisfied with business this season in comparison with business last season / Total number of local tourism industry professionals in Tourism Industry Survey) * 100
- QPI: (Number of newly established tourist services – number of failed tourist services) / Total number of tourist services in destination) * 100

Data availability

- The QPCI must be calculated from the results of the Tourism Industry Survey (see section 3). Only the management of the tourist services should answer.
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI requires that an inventory of the destination stock has been carried out, in terms of the tourist services present, and that this is followed-up on to identify closures and newly established companies. One means of identifying this is using telephone commercial directories, or relevant internet sites. Other means are via the branch associations in the destination or the local Tax Office.

Support to local tourism industry

QPCI:	QMI:	QPI:
Percentage of local tourism industry professionals more than satisfied with business support opportunities offered in the destination	A programme is in place to coordinate business support to tourist services and transport services in the destination and its success is regularly evaluated (Yes/no)	Rate of successful business support applications made by the local tourism industry

Significance

Over 90% of tourism businesses in the EU are SMEs and micro-enterprises. These organisations often do not have the resources necessary to carry on the vital process of product innovation and quality improvement, after the initial success of establishing the business has occurred. Business support, in the form of advice centres, funding programmes, soft loans etc., is one means to assist tourism businesses in the destination to continue to develop and evolve. The indicators chosen reflect the need for business support and are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures the satisfaction of the local tourism industry with the business support opportunities offered in the destination.
- The QMI states whether business support, in the form of advice, workshops, training courses or financial support, is offered to tourist services in the destination in a comprehensive programme. An evaluation requirement should be built into the framework of any business support programme that is offered locally.
- The QPI reflects on how successful the local tourism industry is in applying for the business support on offer, and this relates directly to the QPCI. If the QPCI shows that the local tourism industry is unsatisfied with the level of business support, and the QMI and QPI show that business support programmes are available but only a relatively small number of successful applications are being made every year to access this support, then there is obviously a problem – either with the industry's awareness and understanding of the programmes, or with their attractiveness to the industry – and something needs to be done to improve the QPI result.

Components

- QPCI: (Number of local tourism industry professionals in Tourism Industry Survey more than satisfied with business support opportunities in destination / Total number of local tourism industry professionals in Tourism Industry Survey) * 100
- QPI: (Number of successful applications made in given year for business support / Total number of tourist services and transport services in destination) * 100

Data availability

- The QPCI must be calculated from the results of the Tourism Industry Survey (see section 3). Only the management of the tourist services should answer.
- The QMI relates to an activity that the destination manager should be involved in.
- To complete this QPI, the destination manager needs to be aware of the business support opportunities available to the local tourism industry. Contact can then be taken to the sources of the business support, to find out how active the tourist services in the destination have been, in terms of the number of applications made and the number of successful applications. Alternatively, this information can be collected directly from the tourist services and transport services via the

mation can be collected directly from the tourist services and transport services via the Tourism Industry Survey (see section 3).

Marketing and promotion of destination

QPCI:	QMI:	QPI:
Percentage of local tourism industry professionals more than satisfied with quality of marketing and promotion of destination	The destination has formally approved a tourism strategy, which contains clear directions on which to base marketing, and this is regularly checked (Yes/no)	Number of overnight stays per Euro invested in marketing and promotion of the destination

Significance

Marketing and promotion activities are intrinsic to tourism management. Various mechanisms are used to finance these activities in a destination. Tourist services often contribute funding to common marketing and promotional initiatives, and local authorities provide supplementary funding. It's important that the destination management is accountable to the tourist services in terms of the marketing quality, and that there is sufficient transparency of the return on investment. The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures the satisfaction of the local tourism industry with the quality of the destination's marketing and promotional activities.
- A tourism strategy should be in place, with clear directions for the type of tourism development desired. It's important that all promotion of the destination is then based on the development objectives in the tourism strategy. The QMI determines whether the directions for tourism have been outlined and if the marketing that actually takes place is checked against these for non-conformance
- The QPI indicates how many overnight stays each Euro invested in marketing and promotional activities brings for the destination. The higher the ratio, the better.

Components

- QPCI: (Number of local tourism industry professionals in Tourism Industry Survey more than satisfied with quality of marketing and promotion of destination / Total number of local tourism industry professionals in Tourism Industry Survey) * 100
- QPI: Total number of overnight stays in destination / Marketing costs (EUR)

Data availability

- The QPCI must be calculated from the results of the Tourism Industry Survey (see section 3). Only the management of the tourist services should answer.
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI requires that the number of overnight stays is supplied by all known accommodation stock in the destination, for example using a Tourism Industry Survey (see section 3). It also requires that the destination management keeps account of all known marketing and promotion costs in destination.

Quality of welcome

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with the friendliness of the local population	A procedure is in place for regularly receiving feedback from local people on their opinion of tourism in the destination and this is taken into account (Yes/no)	Tourist season pressure on the destination

Significance

Tourism often affects the everyday lives of the local population living in the destination. It can strengthen the cultural identity of a region and help pave the way for infrastructure improvements. However, a high seasonality can also lead to pressures on the destination in the form of overcrowding, and potential resource shortages, for example lack of drinking water. The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI is based on the assumption that if the local population is generally bothered by the tourism industry, then the tourists may notice a lack of friendliness and hospitality towards them from local people, and reflect this in the relevant question in the Tourist Satisfaction Survey.
- The QMI stresses that it's important to have a communication channel in place between the destination manager and the local population to allow feedback from the local people on tourism, and vice versa. It is also important that the destination manager takes any feedback into consideration. If a significantly poor result is given in the QPCI, then the destination manager may decide to develop a separate resident survey, to measure more accurately local peoples' feelings and identify potential hotspots where actions can be taken to improve their satisfaction.
- The QPI indicates the seasonality of the destination. It uses the standard deviation, which is a measure of the dispersion of the data, in this case room occupancy rates. The higher the number, the greater the seasonality. If the destination is experiencing a high seasonality, then this might account for potential tensions between local people and the tourists. It is in the best interests of the destination to reduce the seasonality of tourism by spreading the visitor influx over a longer period of time. This will also contribute to the long-term viability of the tourism industry and to the employment prospects of local people in the tourism industry.

Components

1 QPCI: (Number of tourists in Tourist Satisfaction Survey more than satisfied with friendliness of local population / Total number of tourists in Tourist Satisfaction Survey) * 100

2 Standard deviation between upper and lower quartiles for average room occupancy rate per month in destination (this can be easily calculated using the standard deviation command available in spreadsheet programmes)

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- For this QPI, the destination manager needs to know the monthly averages for the room occupancy rates in the destination. This can be acquired by sending the Tourism Industry Survey to all known accommodation stock in the destination (see section 3).

Safety and security

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with feeling of security and safety (including availability of health services)	A crime prevention initiative is in operation in the destination involving the tourist services and transport services, and its operation is evaluated (Yes/no)	Ratio of criminal acts involving crime against the person to number of local inhabitants

Significance

It is important that the tourists feel safe and secure at all times on their holiday. High crime rates will have a negative effect on their feelings of security. Crime is a societal problem in any area, and difficult for the destination management to influence. However, the tourists can be informed so that they can avoid getting into potentially serious situations. One way to achieve this is via a crime prevention initiative, which actively involves the tourist and transport services in the destination, as well as the local police force. The availability of good quality health services is also an important parameter for many tourists, for example families with young children.

The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures tourist satisfaction with feelings of safety and security.
- The QMI reflects that the presence of a crime prevention scheme is a good means of identifying crime patterns in the destination and organising information to the tourists to avoid situations which can jeopardise their safety. The framework of the crime prevention scheme should allow for a regular evaluation of its operation, and the identification of means to improve that.
- The QPI indicates the level of serious crime in the destination. It does not register crime per specific victim group, for example tourists.

Components

- QPCI: (Number of tourists in Tourist Satisfaction Survey more than satisfied with feeling of security and safety from crime in the destination / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Total number of criminal acts in destination involving crime against the person / Number of local inhabitants (1000s)

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI is data on all crime against the person in the destination, including theft, sexual crime, grievous bodily harm and manslaughter, related to the destination's resident population. The data can be provided by the local police force. Police forces do not usually break down crime statistics into categories of victim, i.e. tourist, visitor, or local.

Ambient air quality

QPCI:	**QMI:**	**QPI:**
Percentage of tourists more than satisfied with quality of air in destination	Information on ambient concentrations of air pollutants is routinely made available to the public (Yes/no)	Number of days with high air pollution levels

Significance

This indicator focuses on the quality of the air outdoors. Examples of poor air quality are smoke, car exhaust fumes and perhaps even cigarette smoke. Bad air quality can lead to respiratory illness and can have an influence on the tourists' perception of the destination. This indicator reflects the fact that the tourists' opinions of air quality need to be monitored, and that both tourists and residents need to be informed of poor air quality as and when it occurs.

The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures tourist satisfaction levels with air quality in the destination.
- The QMI checks that tourists and local people are informed on days when the concentrations of air pollutants are high.
- The QPI specifies the number of days in the destination with high air pollution levels, in accordance with Framework Directive 96/92 EC on air quality. The selected air quality parameter is particulate matter, mainly due to experiences in data availability from the study. However, the Framework Directive has developed recommended threshold values for a range of other ambient air pollutants, including benzene. The destination should select the most appropriate air quality parameter for use in the QPI indicator.

Components

- QPCI: (Number of tourists in Tourist Satisfaction Survey more than satisfied with quality of air in the destination / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: For particulate matter, state the number of days when the 24-hour limit value for the protection of human health was exceeded (limit value is 50 µg/m^3 PM_{10}) for the reference year. It must not be exceeded more than 35 times per year according to Council Directive 1999/30/EC of 22 April 1999[4].

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to the fact that the Framework Directive 96/92 EC on air quality requires that information on ambient concentrations of air pollutants is routinely made available to the public, i.e. via media broadcasts and internet.
- As the EU legislation on ambient air quality is mainly applicable to urban areas, it is unlikely that data for the QPI will be available for smaller and sparsely populated rural destinations. The environmental department at the local authority will most likely be able to provide this information.

Local environmental quality

QPCI:	**QMI:**	**QPI:**
Percentage of tourists more than satisfied with the cleanliness of the local environment	Responsibilities for managing the cleanliness of the destination have been clearly identified and the effectiveness of their operation is regularly evaluated (Yes/no)	Ratio of litter gathered to the area of the destination

Significance

This is designed to be an overall indicator of environmental quality, and as such covers the cleanliness of the natural, cultural and manmade assets of the destination. The visual appearance of the destination is of course important both for the residents and for the tourists, who place high demands on a litter free and clean environment. Other aspects of cleanliness include levels of dog excrement, graffiti and vandalism. The indicators chosen are interconnected. Working with the QMI should improve the QPCI and the QPI results. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures tourist satisfaction levels with the cleanliness of the destination environment.
- The QMI states whether responsibility for managing the different aspects of the cleanliness of the destination has been delegated, so every one knows who is responsible for what. These responsibilities should be described in a formal document, for example in the overall tourism strategy, and should cover regular cleaning operations, graffiti removal etc. Although cleaning-up is essential, there is also a need for preventive measures to avoid cleanliness problems in the future and awareness raising therefore has an important role to play. This could involve information campaigns, visits to local schools and even media advertisements informing of the need to improve and/or maintain destination cleanliness. The management of the cleanliness of the destination also needs to be evaluated to identify areas for improvement.
- The QPI indicates just how widely litter is dispersed in the destination by measuring the amount of litter per square kilometre. The destination manager's aim must be to reduce this overall figure, via some of the activities suggested in the QMI, and hopefully see a positive effect in the QPCI.

Components

- QPCI: (Number of tourists in Tourist Satisfaction Survey more than satisfied with cleanliness of the local environment / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Total number of litter items / Total area of destination

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager should be aware of.
- The QPI is a difficult indicator to calculate, and might necessitate changes in litter collection routines in the destination. All waste classified as "litter" must be weighed and recorded before being sent for waste treatment. Some EU member states operate national waste registration systems that weigh each heavy vehicle (dustcarts etc.) arriving at a waste treatment facility, and enter this figure into a national database. This is used to calculate waste handling charges for users. If a database exists, and if each litter vehicle arriving at the waste treatment plant is registered separately, then the information for this indicator could be extracted centrally, or directly from the records of the local waste treatment plant(s). As an alternative, one waste container of typical litter could be weighed to calculate its weight, and then this figure could be used to generate an estimate of the amount of litter generated by the destination per year.

Pre-arrival communication

QPCI:	**QMI:**	**QPI:**
Percentage of tourists more than satisfied with the quality of communication on the destination received prior to arrival	Significant market segments are known and their expectations are regularly assessed via market surveys (Yes/no)	Tourist complaints registered per overnight stay

Significance

Before the tourist even arrives in the destination, the quality process has already begun, via the pre-arrival communication between the destination and the tourist. This has a significant influence on the tourists' expectations. If the communication is misleading, the tourists experience a negative quality, and have cause for complaint. The indicators chosen are interconnected. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI reflects the need to monitor the tourists' satisfaction with the communication that they have received on the destination prior to arrival, based on their experiences. This communication typically takes place in a variety of ways, including holiday brochures, internet sites and newspaper articles. Although the destination manager is not necessarily responsible for all of this communication – there are other actors involved for example travel organisers and intermediaries – it is essential to ensure that the information given abut the destination is accurate, and reflects the overall marketing guidance set down in the tourism strategy.
- The QMI shows that the destination is aware of its most important market segments, these could for example be described in the tourism strategy for the destination, and uses market surveys to follow their expectations. With this kind of information, the destination manager will be able to check on the communication that the tourists receive prior to arrival, and see if it matches the expectations of the significant market segments. If not, then there can be a potential clash of interests between tourist groups with rivalling expectations of the destination.
- The QPI is based on the assumption that if the tourists are unsatisfied with the quality of the product that they have purchased, and many of their expectations will most likely have been built on marketing and promotion of the destination, then they will complain.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with quality of communication on destination received pre-arrival / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Number of registered complaints / Number of overnights stays in destination (100 000)

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey. This question can be directly asked to the tourists (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI is a ratio of the number of registered complaints from tourists to the total overnight stays. Tourist services are likely to register written complaints, and a central complaints office may exist in the destination. The overnight stays must be supplied by all known accommodation stock in the destination. The Tourism Industry Survey is one means of acquiring this data (see section 3).

Accessibility

QPCI:	QMI:	QPI:
Percentage of tourists with disabilities and limited mobility more than satisfied with accessibility to tourist services in the destination	The destination is aware of the needs of tourists with disabilities and limited mobility, and regularly raises awareness of why, and how, tourist services can be made more accessible (Yes/no)	Percentage of tourist services suitable for, and accessible by, disabled people and people of limited mobility

Significance

Tourist destinations and services need to account for the accessibility needs of disabled people and people with limited mobility, including elderly people and families with infants that require a pushchair or pram. This will fulfil one of the goals of European tourism – tourism for all – and give the destination access to a potentially very big market, both in terms of domestic and international tourists. The indicators chosen are interconnected. Working with the QMI should improve the QPCI and the QPI results. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI measures the satisfaction of tourists with disabilities and limited mobility with the accessibility of the tourist services in the destination.
- The QMI reflects the importance of catering for the needs of tourists with disabilities and limited mobility, and the destination manager needs to regularly communicate why it is important for tourist services to work with accessibility issues. Furthermore, information needs to be provided on how this can be done, for example by installing different types of equipment and, if relevant, how this can be financed. This information could be communicated via an information campaign. The QMI is even more important if the tourism strategy identifies tourists with disabilities and limited mobility as an important market segment.
- The QPI monitors the level of accessibility of tourist services in the destination, where tourist services are understood to be: (i) information and visitor care, (ii) accommodation and catering, (iii) commercial tourist attractions, events and combined products, (iv) sporting and recreational activities.

Components

- QPCI: (Number of tourists from targeted groups asked in Tourist Satisfaction Survey more than satisfied with accessibility to tourist services / Total number of tourists from targeted groups in Tourist Satisfaction Survey) * 100
- QPI: (Number of tourist services in destination that are suitable for, and accessible by disabled people or people with limited mobility / Total number of tourist services in destination) * 100

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey. This question can be directly asked to the targeted groups (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- Information for the QPI can either be obtained directly from the tourist services via the Tourism Industry Survey (see section 3) or by approaching the branch associations in order to provide this information on behalf of their members. Alternatively, the destination management could decide to test the accessibility themselves by visiting a tourist service in the destination with a disabled person to identify accessible tourist services in the destination and good practice. The maintenance of a

database of updated information on accessible services will facilitate both the collection of the necessary data and the provision of information to tourists with disabilities.

Transport

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with the transport services in the destination	All transport services in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Ratio of complaints on the reliability of public passenger transport in the destination to number of passengers

Significance

The majority of tourists make use of the transport services based in the destination at some point during their holiday. Encouraging tourists to make more use of collective transport is a means of reducing traffic congestion and improving ambient air quality. However, the quality of the transport services has to meet the tourists' expectations. The indicators chosen are interconnected. Working with the QMI should improve the QPCI and the QPI. All three need to be measured on an annual basis, and the results compared with those of previous years:

- The QPCI reflects the need to monitor the tourists' satisfaction with the transport services in the destination.
- The QMI indicates that the destination manager has informed the transport services that operate within the destination of the importance of integrating quality into their management systems. This can be done if they identify the most significant aspects of their service product – for example the process of payment – and then integrate quality into the tasks related to the management of those aspects. This can be done via an information campaign, training exercise or the implementation of a Quality Management System in individual transport services. Furthermore the QMI signals that the destination manager is monitoring and communicating developments in the field of quality management for transport services.
- The QPI is based on the assumption that if the tourists are unsatisfied with the reliability of the transport service that they have purchased, then they will complain.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with the transport services in the destination / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Number of complaints registered on reliability of the public passenger transport in the destination per 100 000 passengers

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey. This question can be directly asked to the tourists (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI is a measurement of the number of complaints registered on the reliability of public passenger transport from all sources. Experience shows that complaints are not always registered according to whether the person making the complaint is a tourist or local resident. Public passenger transport companies should automatically register complaints and be willing to make this information available to the destination manager.

Accommodation

QPCI:	**QMI:**	**QPI:**
Percentage of tourists more than satisfied with their accommodation	All accommodation providers in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Percentage of collective accommodation in the destination certified according to a Quality Management System (QMS), Environmental Management System (EMS) or ecolabelling programme

[NB. For the QPI, a tourist service with both an EMS and QMS certification counts only as 1]

Significance

Accommodation is arguably the single most important ingredient of any holiday. Quality has to match expectations or this can cloud the rest of the holiday. The indicators chosen are interconnected. Working with the QMI should improve the QPCI and the QPI results. All three need to be monitored on at least an annual basis, and the results in the destination compared with those of previous years:

- The QPCI monitors tourist satisfaction with accommodation in the destination.
- The QMI indicates that the destination manager has informed the accommodation providers in the destination of the importance of integrating quality into their management systems. This can be done if they identify the most significant aspects of their service product – for example room cleaning – and then integrate quality into the tasks related to the management of those aspects. This can be done via an information campaign, training exercise or the implementation of a Quality Management System in an individual accommodation provider. Furthermore the QMI signals that the destination manager is monitoring and communicating developments in the field of quality management for accommodation services.
- The QPI monitors levels of certification to Quality and Environmental Management Standards, as well as up-take of ecolabelling programmes, for further quality improvements for guests.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with standard of accommodation / Total number of tourists in the Tourist Satisfaction Survey) * 100
- QPI: (Number of collective accommodation establishments in the destination certified according to either a QMS or an EMS standard or awarded an ecolabel / Total number of collective accommodation establishments in the destination) * 100

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey. This question can be directly asked to the tourists (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- Information for the QPI can either be obtained from tourist services directly via the Tourism Industry Survey (see section 3), or by approaching branch associations.

ⓘ Information

QPCI:	**QMI:**	**QPI:**
Percentage of tourists more than satisfied with the quality of information on things to do in the destination	Information material provided to tourists on things to do in the destination is regularly checked, as well as the means of its provision (Yes/no)	Number of overnight stays per visit to the TICs in the destination

Significance

Tourist Information Centres (TICs) are an important communication point between the tourist and the tourism industry in many destinations, forming a market place where the tourist services in the destination, primarily places to visit, can be advertised to the tourists. This indicator measures the quality of the TICs in the destination and their ability to attract visitors. This is an important aspect often recorded and used to justify continued funding of the TIC.

The indicators chosen are interconnected. All three need to be measured on at least an annual basis, and the results in the destination compared with those of previous years:

- The QPCI measures tourist satisfaction with quality of information provided.
- The QMI verifies that the information material provided to the tourists, once they are in the destination, is checked on a regular basis to catch any outdated information or to identify the need for new information details. The QMI does not only include a check of the information material, but also the means by which it is provided, for example at a TIC or Visitor Management Centre. Here it is important that the quality of information material continues in the way in which it is provided to the tourists.
- The QPI measures the frequency of visits to the TICs in the destination and their success in attracting visitors. The management aspect behind the indicator is that the number of overnights per visit to the TICs must be reduced.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with quality of information on places to visit and things to do in the destination / Total number of tourists in the Tourist Satisfaction Survey) * 100
- QPI: Number of overnight stays in the destination / Number of visits to the TICs in the destination (also known as “footfall”)

Data availability

- The QPCI must be calculated from the results of a Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI requires that the number of overnight stays is supplied by all known accommodation stock in the destination, for example using the Tourism Industry Survey (see section 3). The QPI also requires that the TICs register how many visits they receive on a daily basis. This figure is often used by TICs to communicate their success rates to their financial backers.

Eating and drinking

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with the quality of places to eat and drink in the destination	The quality of the places to eat and drink in the destination is regularly evaluated, and there is a procedure in place to register complaints from tourists	Number of complaints concerning quality of places to eat and drink in the destination per overnight stay

Significance

Most tourists find their way into a restaurant or cafeteria during their holiday, and many dine at the services provided by the accommodation where they are staying. Therefore, there has to be a satisfactory choice of eating and drinking establishments in the destination, and they should be of sufficient quality. Again the key word is tourist expectations, which can often be quite contradictory. Some tourists are relieved to find the food that they eat at home is available when they are on holiday, however, the IQM approach stresses the importance of providing a range of traditional local cuisine to tourists. This serves to maintain traditions and identity, provides an interesting "story" for the tourists and can even boost sales of local agricultural produce and fresh fish caught locally.

The indicators chosen are interconnected. All three need to be measured on at least an annual basis, and the results in the destination compared with those of previous years:

- The QPCI measures tourist satisfaction with the quality of places to eat and drink in the destination.
- The QMI concerns two aspects. Firstly it concerns the regular evaluation of the quality of the eating and drinking experience in the destination by the destination manager. This could involve several activities, for example controlling the results of the hygiene checks that are a legal requirement for all food-serving establishments, or taking part in regular food tasting exercises to check the quality of the food on offer to the tourists.
- The QPI measures the number of complaints registered concerning the quality of the eating and drinking establishments in the destination. This may be inspired by several factors, for example poor service, exceptionally poor value for money or at worst food poisoning.

Components

- QPCI: (Number of tourists in Tourist Satisfaction Survey more than satisfied with range and quality of places to eat and drink / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Number of complaints concerning eating and drinking establishments in the destination / Number of overnight stays (100 000).

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey. This question can be directly asked to the tourists (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI requires that there is a central point where tourists can file a complaint on the quality of the eating and drinking establishments in the destination. The overnight stays are supplied by all known accommodation stock, for example using the Tourism Industry Survey (see section 3).

Activities

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with the range and quality of things to do in the destination	All tourist attractions in the destination are aware of the need to manage the quality of the critical aspects of their service, and are kept informed of developments (Yes/no)	Number of things to and places to visit within a ½ day's travel of the destination per overnight stay

Significance

Activities are an important part of holiday products in most market segments. The provision of things to do in the destination should meet the tourists' expectations, and they should be of a sufficient quality. The indicators chosen are interconnected. All three need to be measured on at least an annual basis, and the results in the destination compared with those of previous years:

- The QPCI monitors tourist satisfaction with the range and quality of activities in the destination.
- The QMI indicates that the destination manager has informed the tourist attractions in the destination of the importance of integrating quality into their management systems. This can be done if they identify the most significant aspects of their service product – for example a guided tour – and then integrate quality into the tasks related to the management of those aspects. This can be achieved via an information campaign, training exercise or the implementation of a Quality Management System in an individual tourist attraction. Furthermore the QMI signals that the destination manager is monitoring and communicating developments in the field of quality management for tourist attractions.
- The QPI is a measure of the supply of activities to the tourist in the destination. As tourists responding to the QPCI might have a different perception of the destination to the destination manager, it's important that the destination manager is aware of tourist activities within ½ day's travel of the destination. These activities should then be incorporated into the scope of the QMI that the destination manager works with.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with range and quality of things to do and places to visit / Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: Number of commercial tourist attractions, sporting & recreational activities, and cultural & sporting events within a ½ day's travel of the destination / Number of overnight stays in destination (100 000)

Data availability

- The QPCI must be calculated from the results of a Tourist Satisfaction Survey. This question can be directly asked to the tourists (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- The QPI requires an inventory of the number of commercial tourist attractions, sporting & recreational activities, and cultural & sporting events within a ½ day's travel of the destination. The overnight stays are supplied by all known accommodation stock, via for example the Tourism Industry Survey (see section 3).

Bathing water quality (if applicable)

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with the cleanliness of the bathing areas in the destination	There is a an integrated management plan in place that covers the bathing areas in the destination and its operation is regularly evaluated (Yes/no)	Percentage of bathing areas in the destination not complying with mandatory values in the EU Bathing Water Directive

Significance

Bathing water quality is an essential aspect of holidays at the coast. Nonetheless, many urban and rural destinations have a long tradition of bathing opportunities for tourists by lakes and rivers, and many more are on the way. For example, a recent trend is to create artificial beaches in the middle of cities (either on a river or in the harbour area) to provide bathing opportunities close to the city centre. This indicator reflects the need for the destination management to be aware of bathing water quality at the various bathing areas in the destination. The indicators chosen are interconnected. All three need to be measured on an at least an annual basis, and the results compared with those of previous years:

- The QPCI measures the satisfaction of the tourists with the cleanliness of the bathing areas.
- The QMI recognises the fact that there can be several competing activities taking place at sites that are also used as bathing areas by tourists. For example there may be nature conservation interests, agricultural interests as well as fishing interests. To avoid a conflict of interests, it is necessary to develop an integrated management plan, reflecting the needs of all these groups and outlining a management strategy. This could for example be part of the tourism strategy. The work done on Integrated Coastal Zone Management in Europe can provide further guidance on how to go about developing an integrated management plan, and what it should contain (see Annex 6 for website).
- The QPI specifies those bathing areas in the destination that do not comply with the mandatory water quality values specified in the EU Bathing Water Directive. It does not include those bathing areas with a bathing ban. The indicator is a form of early warning indicator as it puts the focus on those bathing areas that are heading for a bathing ban.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with the cleanliness of the bathing areas in the destination/ Total number of tourists in Tourist Satisfaction Survey) * 100
- QPI: (Total number of sampling points in destination not complying with mandatory values in EU Bathing Water Quality Directive / Total number of sampling points in destination) * 100

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager should be aware of.
- Data for the QPI is directly available from the EU Bathing Water Quality Directive internet site: www.europa.eu.int/water/cgi-bin/bw.pl under "Atlas". Alternatively, the environmental departments at the local authorities should be able to provide bathing water quality data for the sampling points in the destination. It is assumed that there is a correlation between sampling points and bathing areas.

Value for money

QPCI:	QMI:	QPI:
Percentage of tourists more than satisfied with value for money in general	The destination has developed and formally approved a tourism strategy and it is reviewed regularly (Yes/no)	Percentage of return tourists

Significance

Value for money is closely related to the concept of quality. When a tourist judges a product or service to be good value for the price charged, the tourist is making a quality judgement in relation to the price paid. Whether the tourist will buy the product again, be it a dinner at a restaurant or the holiday in the destination itself, will largely depend on their perception of value for money. The indicators chosen are interconnected. All three need to be measured on at least an annual basis, and the results in the destination compared with those of previous years:

- The QPCI measures tourist satisfaction based on their feelings of value for money.
- The QMI reflects the need for the destination to develop a tourism strategy. The tourism strategy functions as an overall document guiding the integrated approach to tourism development in the destination, and is a key tool in developing a product that will give value for money to the tourist. It should be accepted and approved at the political level for maximum impact (see section 2), and be reviewed regularly, using the information generated by the QUALITEST tool.
- The QPI indicates the number of tourists that physically return to the destination.

Components

- QPCI: (Number of tourists in the Tourist Satisfaction Survey more than satisfied with value for money in the destination / Total number of tourists in the Tourist Satisfaction Survey) * 100
- QPI: (Number of tourists in the Tourist Satisfaction Survey that state that this is a return trip to destination / Total number of tourists in the Tourist Satisfaction Survey) * 100

Data availability

- The QPCI must be calculated from the results of the Tourist Satisfaction Survey (see section 3).
- The QMI relates to an activity that the destination manager is responsible for and should therefore be aware of.
- There are several potential methods of acquiring the data necessary for the QPI. One method is to include this question into the Tourist Satisfaction Survey (see section 3). Alternatively, a survey could be organised of tourists arriving at the destination at specific points, for example at a ferry terminal or train station. Finally, the tourists could be asked to specify if this is a return visit to the destination in communication with TICs, for example via internet booking systems. The QPI can, by using data for the previous year, show a percentage difference in the indicator of return tourists between two consecutive years – hopefully showing a positive trend.

Annex

Annex 1. Terms and Definitions

The QUALITEST tool is based on a set of recommended indicators for evaluating the quality performance of tourist destinations and services. The indicators are built on a range of specific expressions. This section gives precise explanations of the expressions used. Some explanations use existing definitions. These explanations are numbered, linking them to a note in Annex 2, which gives a precise reference. Other explanations are terms developed for this study, and are not numbered. It is vital that these terms and definitions are used to ensure a common foundation for data acquisition for the indicators.

Quality

The quality of a service or product is its ability to satisfy the needs and expectations of the consumer. In a tourist destination, the tourist must be regarded as the consumer[5].

Integrated Quality Management (IQM)

IQM should simultaneously take into account, and have a favourable impact on the activities of tourism professionals, tourists, the local population and the environment (that is natural, cultural and manmade assets of the destination). The IQM strategy implemented in destinations must have the requirements of tourists as one of its main considerations[6].

Indicator

An indicator is something that provides a clue to a matter of larger significance or makes perceptible a trend or phenomenon that is not immediately detectable[7].

Quality performance

The results of an organisation's management of its quality aspects[8].

Quality Performance Evaluation (QPE)

Quality Performance Evaluation (QPE) is a process to facilitate management decisions regarding a destination's quality performance by: measuring and completing the Quality Perception Condition Indicators, the Quality Management Indicators and Quality Performance Indicators, monitoring the results over time, and benchmarking results against those from similar destinations.

Quality Perception Condition Indicators (QPCI)

A specific expression that provides information about the condition of perceptions of quality within a destination, based on Tourist and Tourism Industry Satisfaction Surveys[9].

Quality Management Indicators (QMI)

Provides information about the management efforts to influence a destination's quality performance[10].

Quality Performance Indicators (QPI)

A specific expression that provides information about a destination's quality performance[11].

Tourism

The activities of persons who travel to and stay in places which are distinct from their usual place of abode for a period of less than 12 consecutive months, for leisure, business or other purposes[12].

Tourist

Visitors who stay at least one night in a collective or private accommodation in the place/country visited[13].

Tourist service
An enterprise or part thereof situated in a geographically identified place. At or from this place an economic activity related to tourism is carried out for which - save for certain exceptions - one or more persons work (even if only part-time) for one and the same enterprise[14]. In QUALITEST, the term tourist service is used to cover the following sectors: (i) information and visitor care, (ii) accommodation and catering, (iii) commercial tourist attractions, events and combined products, (iv) sporting and recreational activities.

Transport service
This term covers enterprises that provide various types of transport solutions to tourists and local residents alike. Examples are train, bus and coach companies.

Tourist destination
An area which is separately identified and promoted to tourists as a place to visit, and within which the tourism product is co-ordinated by one or more identifiable authorities or organisations[15].

Destination manager
The destination manager can be a single person or an organisation that has been appointed to take responsibility for coordinating the tourism development of a destination.

Public passenger transport
Transport services which have the following characteristics: are open to all; are publicly advertised; have fixed times or frequencies, and periods of operation; have fixed routes and stopping places; are provided on a continuing basis and have a published fare[16].

Tourist accommodation
Any facility that regularly or occasionally provides overnight accommodation for tourists[17].

Collective accommodation
A collective accommodation establishment provides overnight lodging for the traveller in a room or some other unit, but the number of places it provides must be greater than a specified minimum for groups of persons exceeding a single family unit and all the places in the establishment must come under a common commercial-type management, even if it is non-profit-making[18]. Examples include: hotels, tourist campsites, marinas and health establishments.

Private accommodation
This covers the remaining types of tourist accommodation that do not conform to the definition of "establishment". Private tourism accommodation provides, for or without charge, a limited number of places. Each accommodation unit (room, dwelling) is independent and is occupied by tourists, usually by week or weekend, fortnight or month, or by its owners as a second or holiday home[19]. Examples are: rented rooms in family houses and dwellings rented from private individuals.

Eating and drinking establishment
This is a tourist service that sells food and drink products to both local people and tourists. Examples include restaurants and bars (also those within hotels and attractions), pubs, tearooms and cafés.

Sporting and recreational activity
This is a tourist service that provides a range of outdoor and indoor leisure products to tourists. Examples include pony trekking, windsurfing and swimming.

Commercial tourist attraction
A commercial tourist attraction is a tourist service that is promoted to tourists as a place to visit, and charges an entrance fee. Examples include theme parks, beach piers and large historical monuments.

Cultural and sporting event
These tourist services are temporally restricted, and are repeated in a determined pattern – either annually, biannually etc. Examples include spectator sporting events, music festivals and cultural festivals.

Tourism strategy
A clear written statement of objectives for tourism development, marketing and management, with identified targets, which forms the basis for an action programme[20].

Business Support
This term includes a variety of opportunities that may be available to businesses in the destination to improve their business. Examples include grant schemes, loans with favourable repayment schedules as well as consultancy and training. Business support may be provided by local authorities, regional authorities or by national government. Typically a formal or informal application procedure is a requirement to be able to access business support.

Tourist Information Centre (TIC)
This is a tourist service that provides information to tourists. There are different levels of staffing of tourist information points. To be classified as a TIC, the service has to have at least one part time employee in function.

Rating scheme
System providing an assessment of the quality standards and provision of facility and/or service of tourist services and transport services. For example, accommodation rating schemes typically assess establishments within five categories, often indicated by one to five symbols. Note: The assessment system can be organised by international, national or regional authorities, tourist boards, trade associations, guide publishers or by the owners of the tourist services and transport services themselves[21].

Certified Environmental Management System
An Environmental Management System (EMS) that has been certified according to a national or international environmental management standard, for example EMAS and ISO 14001.

Certified Quality Management System
A Quality Management System (QMS) that has been certified according to a national or international quality management standard, for example Q1000 in Finland or ISO 9000.

Ecolabelling programme
Voluntary, multiple-criteria-based third party programme that awards a license which authorizes the use of environmental labels on products indicating overall environmental preferability of a product within a particular product category based on life cycle considerations[22].

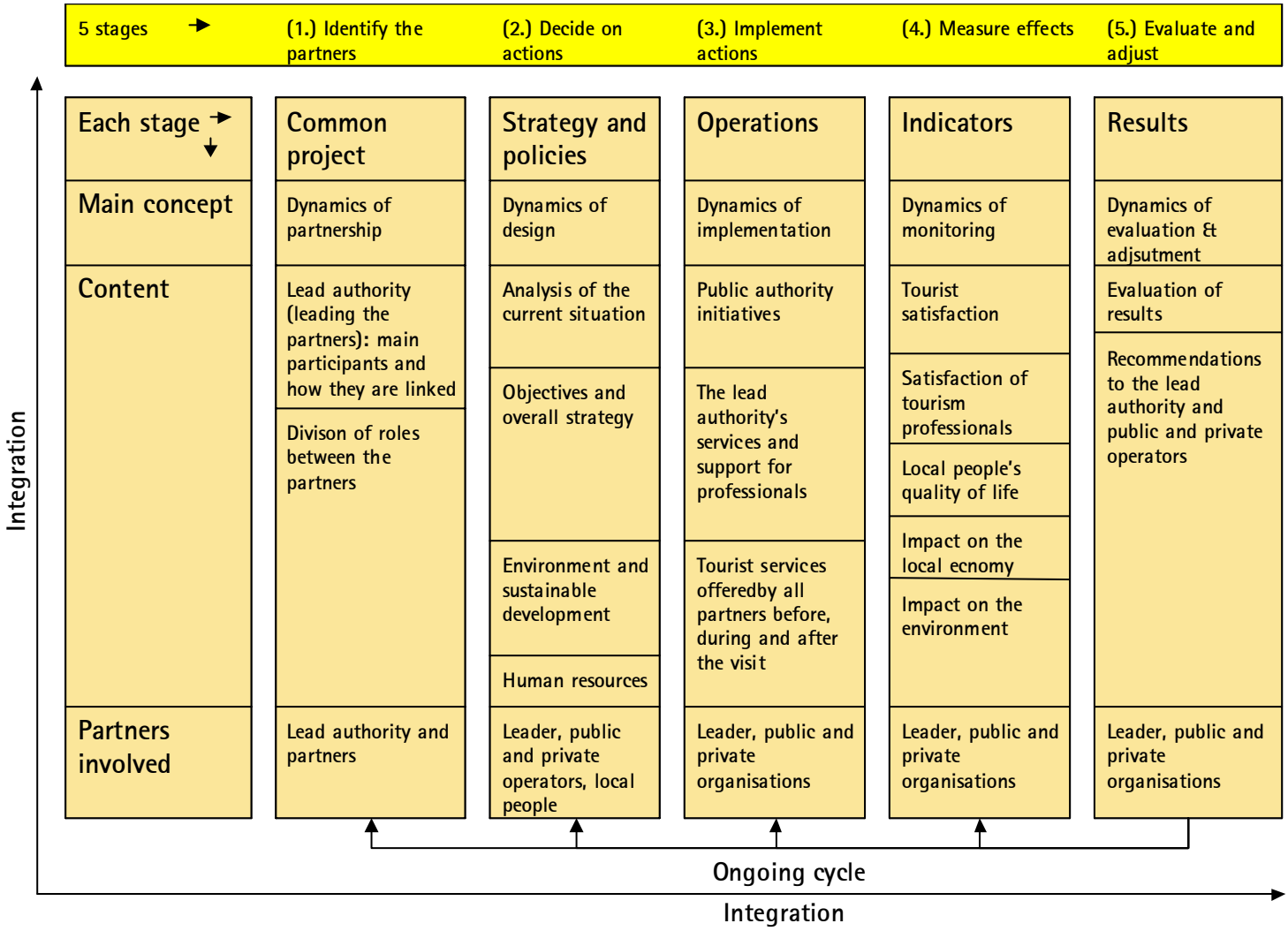
Marketing costs
Marketing expenditure spent by the destination manager in a given year on for example: production of all promotional print, advertising, direct mail, PR, telesales, promotions, and exhibition stands and attendance. The destination manager is typically the local authority or a public/private destination company. This does not include the private marketing expenditure of hotels and other tourist services.

Benchmarking
Benchmarking – the process of identifying and learning from Good Practices in other organisations – is a powerful tool in the quest for continuous improvement and performance breakthroughs[23].

Annex 2. Endnotes

1. Forschungsgemeinschaft Urlaub und Reisen (FUR)
2. "Study on the expectations of German population on environmental qualities and ecolabelled tourism products", VISIT (Voluntary Initiatives for Sustainability in Tourism), EU LIFE Environment project, 2002
3. The Public Sector Benchmarking Service website, UK, 2003 (http://www.benchmarking.gov.uk)
4. Council Directive 1999/30/EC of 22 April 1999 relating to limit values for sulphur dioxide, nitrogen dioxide and oxides of nitrogen, particulate matter and lead in ambient air, OJ L 163, 29/06/1999 P. 0041 – 0060, ANNEX III
5. Adapted from "Towards quality urban tourism, European Commission, Brussels, 1999"
6. Ibid.
7. "Environmental Indicators; a systematic approach to measuring and reporting on environmental policy performance in the context of sustainable development", World Resources Institute, 1997
8. (Adapted from) Environmental management – Environmental Performance Evaluation – Guidelines, DS/EN ISO 14031, 2000
9. Ibid.
10. Ibid.
11. Ibid.
12. 1999/35/EC: Commission Decision of 9 December 1998 on procedures for implementing Council Directive 95/57/EC on the collection of statistical information in the field of tourism. OJ L 009, 15/01/99
13. Ibid.
14. Ibid.
15. Adapted from "Towards quality urban tourism, European Commission, Brussels, 1999"
16. Transportation – Logistics and services – public passenger transport – service quality definition, targeting and measurement, European Standard EN 13816, CEN, April 2002
17. 1999/35/EC: Commission Decision of 9 December 1998 on procedures for implementing Council Directive 95/57/EC on the collection of statistical information in the field of tourism. OJ L 009, 15/01/99
18. Ibid.
19. Ibid.
20. "Towards quality rural tourism, European Commission, Brussels, 1999"
21. prEN ISO 18513 "Tourism Services. Hotels and other types of tourism accommodation. Terminology", Final draft, CEN/TC 329/WG 1 N 117
22. "ISO 14024: 1999 Environmental labels and declarations -- Type I environmental labelling -- Principles and procedures"
23. The European Benchmarking Code of Conduct, EFQM, 1998 – 99

Annex 3. Integrated Quality Management



Source: "Towards quality urban tourism, European Commission, Brussels, 1999"

Useful documents

Towards quality rural tourism, Integrated Quality Management (IQM) of rural tourist destinations, Enterprise Directorate-General Tourism Unit, Brussels 1999

Towards quality urban tourism, Integrated Quality Management (IQM) of urban tourist destinations, Enterprise Directorate-General Tourism Unit, Brussels 1999

Towards quality coastal tourism, Integrated Quality Management (IQM) of coastal tourist destinations, Enterprise Directorate-General Tourism Unit, Brussels 1999

Annex 4. Comparison of Quality Management Standards for Tourist Services

	Quality Label for Swiss Tourism	Quality 1000	Spanish Quality Tourism Mark
Logo			
Country of origin	Switzerland	Finland	Spain
Concept exported?	Yes, to Germany and Austria	No	No
Which sectors of the tourism industry can be certified with the label?	A generic label adapting Total Quality Management to the special requirements of tourist companies	All small and medium-sized tourism businesses	Specific quality standards developed for: Hotels and holiday apartments, travel agents, restaurants, campsites and holiday complexes, ski and mountain resorts and rural tourism accommodation
Are there levels?	Yes, from QI to QIII	No	No
Quality policy required?	A Quality profile must be developed (QI)	After self-assessment, a quality policy developed	Development of a quality policy during the early stages of the process
Implementation of satisfaction surveys required?	Yes, Employees' poll and Guests' poll (QII)	Yes, customer & personnel satisfaction surveys	Yes, monitoring of complaints & suggestions
Quality indicators required?	These are individually determined	Yes, on-line benchmarking is also available	Yes, instructions have been developed on applying quality indicators
Does the programme offer formal training?	Yes, trainers attend courses to become Quality-Coaches, and can then train others	Yes, company training, regional training, and audit training	Yes, there is a training programme for auditors
Is auditing part of the standard?	Yes, done by a Mystery Guest	Yes, done by self-assessment	Yes, there is a third party audit

(For more information on these quality management standards, check the relevant websites listed in Annex 6.)

Quality Label for Swiss Tourism

This standard was developed by Research Institute for Leisure and Tourism at the University of Berne and the Frey Academy in Zurich and is supported by the State Secretariat for Economic Affairs. A need was identified by the Swiss tourism sector in the mid 1990s to offer tourist services the possibility of having their service quality checked, safeguarded and optimised, which has resulted in the standard. It is intended for companies that want to ensure constant improvement in their performance, and size and type of company is not decisive, although level III is primarily intended for companies with more than 5 employees. Level I concentrates on development of quality, level II concentrates on quality assurance and in particular the quality of management, and Level III concentrates on a Total Quality Management system for tourist companies.

Quality 1000

This standard, developed by the Finnish Tourist Board and the Travel Development Centre, was launched in 2001. The objective of Quality 1000 is to create particular common quality criteria and instruments for small and medium-sized tourism businesses that may be applied to the various sectors of the industry. The standard consists of three central components: Training, use of Quality Tools and a Quality Net. Training programmes are offered to companies in quality and auditing, as well as a specific training programme for Tourist Centres. The Quality tools are collected in the Quality improvement handbook and include self-evaluation. The Quality Net is an internet based quality control where users can compare client and personnel satisfaction and quality indicators.

Spanish Quality Tourism Mark

This standard is operated by the Spanish Institute for Quality Tourism (ICTE). ICTE was established in 2000 and is a non-profit making association whose founding members are the national business associations of the six subsectors of the tourism industry that have developed quality standards (see table above). Prior to the establishment of ICTE, the State Secretariat for Trade and Tourism had designed the Spanish Quality Tourism System (SCTE). The national business associations had interpreted SCTE for their respective sectors, resulting in six separate quality systems, each with its own management body. With the creation of ICTE, the sectors consolidated their efforts into a single intersectoral management body with one overall quality label. The Spanish Quality Tourism Mark is based on service Quality Standards, and compliance with these is obligatory for certification. According to ICTE, the mark is at an intermediate level between ISO 9000 and the European Business Excellence Model (EFQM).

Annex 5. The National Tourism Best Value Management Group – England

The National Tourism Best Value Management Group (NTBVG) was established some four years ago with the object of creating a self-help group for Local Authority tourism officers preparing for their Best Value Review process.

The Group now represents some 160 subscribers, about half of all tourism officers in England and Wales. It is supported by a management team including representatives from the Regional Tourist Boards, the Local Government Association, the Tourism Society, the Institute of Leisure and Amenity Management, the British Resorts Association, the Tourism Management Institute together with the 14 category group heads from the county, rural, coastal, city and London sub groups. Tourism South East, a regional tourist board, have been contracted to manage the process which is recognised and supported by the Audit Commission, a UK regulatory and inspection body for Local Authority standards and performance.

For a modest subscription the destination managers who belong to the NTBVG also belong to a category sub-group chosen as being closest in nature to their individual destinations i.e. coastal, rural, London, city or county. It is here that the greatest benefits accrue. The regular sub group meetings are a valuable source of new ideas, best practice, increased knowledge, networking and general support. Shared activity in the category groups has produced a wealth of best practice information on divers topics relevant to tourism e.g. Measuring accommodation stock, event management, TIC performance, measurement of customer satisfaction, conference destination marketing and techniques for improving income. The work of the category groups is continually establishing new standards of tourism professionalism across the UK.

Underpinning the work of the category groups is the annual benchmarking survey " The Baseline Statement" completed by all destination subscribers. The questionnaire started out as a simple comparison of core tourism data and has now advanced to a more sophisticated process. The information provided generates the data required for an effective Best Value assessment. The confidential data is analysed and reports are generated for the relevant category groups. This enables members to compare their own performance year on year and to benchmark themselves against comparable destinations on a continuous basis. The NTBVG is in regular consultation with the Audit Commission to ensure that all information is current.

The NTBVG is keen to share its experience and expertise on a wider basis to allow for broader comparison across Europe and would be pleased to discuss opportunities for development. The Baseline questionnaire, advice sheets and survey forms are copyrighted.

Annex 6. Useful Websites

Destinations participating in the study:

Cork, Republic of Ireland:	www.corkcorp.ie/tourism
El Vendrell, Spain:	www.vendrellturistic.com
Helsinki, Finland:	www.helsiniki.fi
Isle of Man, UK:	www.gov.im/tourism
Lech, Austria:	www.lech-zuers.at
Lesvos, Greece:	www.lesvos.com
Lillehammer, Norway:	www.lillehammerturist.no
Odsherred, Denmark:	www.odsherred.com
Söderslätt, Sweden:	www.vellinge.se/turism
Toulouse, France:	www.ot-toulouse.fr

Quality Management Systems for Tourist Services:

Quality 1000, Finland:	www.laatutonni.fi
Qualitäts-Gütesiegel für den Schweizer Tourismus:	www.swisstourfed.ch
la Marca de Calidad Turística Española:	www.icte.es

Quality Management Programmes in Tourist Destinations:

Destination Management Monitor, Austria:	www.dmma.at
Vallais Excellence, Switzerland:	www.valais-excellence.ch
Destination 21, Denmark:	www.destination21.dk

European Commission:

At the website of the Tourism Unit at Enterprise DG, it is possible to download the three publications resulting from the Integrated Quality Management (IQM) studies carried out for rural, coastal and urban destinations. These publications are available in a variety of languages. The website also gives the user information on tourism in the EU, studies done and tourism policy initiatives:

www.europa.eu.int/comm/enterprise/services/tourism/index_en.htm

General information on destination management:

Integrated Coastal Zone Management in Europe:
http://www.europa.eu.int/comm/environment/iczm/home.htm

DestiNet – Sustainable Tourism Information Portal: http://destinet.ewindows.eu.org