

Creating an Action Plan: Setting Targets to Measure and Monitor Progress

Learning is the first step toward taking action. Incorporating new action ideas into an existing plan or creating a new plan – even a simple work plan – to get started on making changes, is an excellent way to see results soon, as well as over the long term. The information and guidance up to now, combined with the accompanying workbook exercises, should mean that you are now in a position to set out a list of potential goals to include in your action plan. When this list has been agreed on and signed off by colleagues and other key individuals and entities, you can begin to write up a plan, setting out your goals and targets and the actions you will take to achieve your targets.

Decide what format you would like to use for your plan. You may find the structure of sustainability or general action plans produced by other businesses well-suited to your needs, or you may create your own template based on other existing organizational plans. For example, you could set out short/ medium/ long-term actions or group them by action area; such as, product development/ marketing/ environmental, social, etc.

Step 1: Clarify Your Vision And Ideal Outcomes To Create Goals

Why do you want tourism? What's your vision for tourism in your community? How do you want it to contribute to your place or business? What is the change you wish to see?



Before embarking on creating your plan, it is useful to reflect on what you think the main goals and outcomes of tourism should be in your community. It is worth opening up this discussion to colleagues in your organization, or those that you work closely with such as your board if you have one, so that you are including a wider range of perspectives. You could discuss it during a team meeting, planned brainstorming session, working lunch or in informal one-to-one or group chats with colleagues. To frame the discussions, it might be useful to think about what tourism would look like in your destination in a perfect world, i.e., with no barriers.

It is helpful to think about how tourism can contribute to the local economy, how it can protect and conserve the natural environment, how it can better celebrate diverse cultures, how it can contribute to community needs. You can also think about the changes you'd like to see across the sector including accommodations, activities, transportation, etc. The planning worksheet provides examples to help you generate ideas.

Ideally, this stage is informed by a broad, community engagement effort, to identify challenges, risks, opportunities and community priorities, and to develop a shared vision together.

Step 2: Map It Out

Your context

This stage is all about understanding the current situation. Taking note of all the impacts you have identified across economic, environmental, social and cultural areas – any challenges you are experiencing in your destination. Documenting current impacts, both positive and negative, are important, so that you can identify actions and solutions to both mitigate negatives and drive positives. Think about both tourism's impacts as well as external threats – or areas outside your control that you will still want to manage, in order to reduce risks. Refer back to Section 5, Understanding and Managing Impacts, and the planning worksheet to help you through this stage.

What are you already doing around sustainability, destination stewardship and improving diversity, equity, inclusion and accessibility in your organization and across your destination?

This is a good time to take stock of what your organization is doing, has the scope to do, and who else in your community is working on initiatives that you may be able to support or partner with, in order to make progress on your goals.

At this stage it is important to take some time to map out key potential partners and collaborators, identifying those entities or individuals whose approval, buy-in and engagement will be vital for creating and implementing your plan, or who will play an important role in supporting it. Consider how you can collaborate with and proactively engage others to achieve your sustainability goals - within your local area as well as across the sector in which you operate.

Step 3: Prioritize Actions

Based on the goals for the outcomes you wish to see, and the context of your organization and community members, start brainstorming the solutions to the challenges and the specific actions you could take. Remember that changes to product and marketing strategies can be made by using 'destination stewardship lenses' including climate and diversity, equity, inclusion, and accessibility.



Courtesy of State of Washington Tourism

It might be useful to focus initially on low-hanging fruit (low and no-cost options or easily implementable actions) to start without significant investment or organizational change. You should also include bigger, multi-year actions that will have much larger impacts and can be broken down into steps - and note any other initiatives to consider in the future, for example once funding is available.

Think about what you can lead, what you can partner on, and what you can advocate for. It might be helpful to categorize actions in this way.

Prioritize key actions by considering:

- **Impact:** How significant an impact would certain actions have in terms of building resilience to future shocks, reducing your carbon footprint, decreasing waste, increasing inclusion and equity, etc.?
- **Building momentum:** What could you make a start on today, that will make a difference tomorrow?
- **Capability:** Does your business have the resources (people, finance, time, skills) to deliver the actions? If not, how soon) could they be developed /recruited / raised? Think again about your organization's sphere of influence. If the main impact you can have is via marketing because that is your main activity, what could you change to reduce negative impacts and increase positive impacts - to your community, to residents, to your environment, to the climate?

Courtesy of Visit Issaquah

It is also important to set out how your plan will be implemented by documenting lead/responsible parties, possible collaborators, cost estimates, and potential funding sources.

Step 4: Set Targets with Key Performance Indicators to Monitor Success

What will ‘sustainability and resilience’ look like if successful, and how will you know if the plan has worked?

The core actions and goals of a plan must be measurable so that it is possible to check if your actions are working. This section will set out the key steps to take when putting together a plan and explore approaches to monitoring and measuring and different types of indicators balanced across economic, social and environmental areas, and will highlight the importance of continuous monitoring to successful planning.

“Development that’s not sustainable is not, in fact, development. It’s a short-term loan against a long-term debt to the future.” Edward Norton, UN Goodwill Ambassador for Biodiversity



Perspective Destination Netherlands 2030

Perspective 2030, the vision for tourism in the Netherlands is about the changing role of tourism. The goal is for every Dutch person to benefit from tourism. Priorities for achieving this ambition are:

- Benefits and burdens are in balance, more benefits from tourism than burdens
- All of the Netherlands is attractive: put more cities and regions on the map as attractive destinations
- Accessible and achievable: accessible cities and regions
- Sustainability is a must: a living environment with less waste and pollution
- A hospitable sector: the Netherlands as a welcoming destination

(Source: [Netherlands Board of Tourism & Conventions](#), 2019)

Changing the Goal

‘Doughnut Economics’ (Kate Raworth, 2012) is an alternative model for economic growth. The model provides a way of looking at how we can meet the needs of all within the means of the planet. In 2022, Hartman and Heslinga published ‘The Destination Doughnut’, adopting this model to tourism to demonstrate effects of tourism impact overshoots and shortfalls.

- Before COVID, Amsterdam was experiencing over-tourism and were already working towards building longer-term resilience.
- The Netherlands has since adopted the principle of doughnut economics in setting out their tourism strategy.
- In 2023, Amsterdam capped visitor numbers to the city center.

(Source: City Nation Place, 2020, [The Doughnut Destination 2022](#), [City of Amsterdam 2023](#))



Defining what success looks like for your organization must be aligned with what ‘successful tourism’ in your community looks like.

As this handbook has explored, if it is based purely on economic growth, how will you measure the costs to the environment? What does success in terms of biodiversity look like? In terms of inclusion? How important is resident well-being? To what extent are residents able to meet their needs? This handbook has provided information on how you can begin to assess and manage the impacts of tourism and begin thinking about what measures of success you want to prioritize in your action plan.

Types of Indicators

Your plan should have clearly defined goals, objectives and timescales that can be measured so that reported progress towards success is based on evidence.

It is useful to think of performance indicators at two levels:

	Purpose	Examples
Level 1 'Effort'	These types of indicators help to check that planned actions are taken.	E.g., Did businesses work together? Was the training delivered?
Level 2 'Effect'	These types of indicators help to test the effectiveness, i.e., the 'performance' or impact of strategies. Baseline measurements must be taken so that it is possible to track progress.	<p>Business support: How many target businesses accessed support? What is the % increase in small businesses' income?</p> <p>Product development: How many visitors have used new cycling and self-drive routes? What are visitor satisfaction levels / how have they changed?</p> <p>Inclusion: Do more diverse groups visit? Do they feel welcome? Are there more accessible properties and activities available? Are there more diverse populations and enterprises benefiting from tourism?</p> <p>Overcrowding: How has resident satisfaction improved? How have visitor flows changed?</p>

Key Performance Indicators (KPIs)

Selecting KPIs must reflect what is important in your community and should be based on what is meaningful for long-term sustainability, including key impacts identified as priorities to manage. Consultation and coordination with broader groups will be essential to ensuring that indicators for community and environmental benefits reflect community priorities.

What new, balanced measures of success can you put in place to assess the impact and value of tourism in your destination?

The following types of indicators may be useful to include across the action areas within your plan, where relevant:

- **Warning indicators** e.g., business bankruptcies, signs of environmental degradation, signs of resident dissatisfaction.
- **Status indicators** e.g. visitor numbers, visitor flows, small businesses' revenues, protected area visitation.
- **Indicators of effort** e.g., resources and support provided to organizations, visitor management systems in place.



- **Indicators of effect, results or performance** e.g., changed satisfaction levels, greater dispersal of visitors, reduced waste or litter, reduced energy use (and carbon emissions).

Being flexible

Change will continue to happen both in destination and in international markets, so it is important to develop a flexible strategy and conduct continuous monitoring to ensure you are on the right track. Following this approach to monitoring and measuring will help to ensure that even if there are significant shocks ahead you will have the data to help you make informed responses.

Step 5: Implement and monitor your plan

Think about how you make it clear to your colleagues and others how they should be involved in implementing the plan.

Develop a process to monitor KPIs and review plan progress frequently, perhaps monthly or quarterly. Make sure you have a clear reporting mechanism and timeline and know from whom you will need to gather data. Frequent touch points will allow for course corrections, consideration of challenges and opportunities, and accountability. Celebrate achievements publicly and communicate about implementation frequently, through newsletters, social media, and/or at events. Also report to your own audiences and be sure to share progress (and lack thereof, if applicable) internally.

Monika Wieland Shields Orca Behavior Institute,
Courtesy of San Juan Islands Visitors Bureau

Decide on an appropriate process for updating your plan and integrate insights and best practices from others. Share your journey and connect with others who want to develop a plan or are on their journey and have lessons learned to share.

Successful implementation will depend on various factors including:

- The motivation and commitment of the group that will be responsible for the plan's implementation
- The ability of multi-sector partners in the destination to collaborate
- The flexibility to adapt the plan to the changing environment.

It is important to recognize that the size of your plan and the number of KPIs may be reflective of the size of your organization. Choosing a smaller number of achievable KPIs, appropriate for your organization's size and mandate, is better than trying to commit to something that is not feasible. Start with what's possible and you can make adjustments over time as your capabilities grow or funding increases, or mandates change.

Reflections

- **How will you define success?**
- **Do your chosen metrics address what is important?**
- **How much emphasis have you placed on effort vs effectiveness or impact?**
- **Have you planned for baseline data collection as well as ongoing monitoring and measuring?**
- **Can you easily adapt?**



Jive Time Records, Greg Balkin - Wondercamp,
Courtesy of State of Washington Tourism

Plan Preparation: Questions Checklist

Reflections and key questions from throughout the handbook are summarized here to help you prepare your plan:

Defining what successful tourism means to your community

- How do you define what successful tourism looks like in your community?
- How do you measure the impact of tourism?
- Have you made changes to your organization's priorities and procedures in response to recent global events?
- What is the status of inclusivity in your destination? And where would you like to get to?
- Do you consult or work with other groups in your community that make decisions about tourism? E.g., local government organizations, Tribes, resident/community groups, environmental groups etc.

Identifying challenges and threats

- What are the main challenges related to tourism in your community?
- What are the biggest future threats to tourism in your community?

Mapping what is already happening

- Do you have a tourism plan or strategy document? If so, how up to date is it?
- Does your business already have a sustainability plan or responsible travel policy in place? If so, what does it include?

Gas Works Park, Greg Balkin - Wondercamp,
Courtesy of State of Washington Tourism

- What are you already doing on sustainability, social responsibility, climate action or diversity, equity, inclusion and accessibility?
- Could you make any immediate changes within your organization's structure and operations to improve sustainability?
- Do you have policies in place to improve DEIA? Can you think of any changes you could make in your organization that would widen opportunities for marginalized or underrepresented groups?
- What other groups or organizations in your community could you engage with to strengthen existing plans/develop a new plan?
- Do you have any relationships with or tourism initiatives in place with Indigenous communities?
- What organizations would you like to reach out to and support or engage for advice?

Identifying the impacts of tourism in your community

- What insights do you already have on the economic, environmental, social and cultural impacts of tourism in your destination?
- How were each of these areas affected by the pandemic?
- How might they be impacted by climate change?
- What existing data is available to better understand these impacts?



Managing impacts

- What are the main negative visitor impacts in your community? Do you have any strategies to minimize these impacts?
- Do you have tools in place for tracking the flow of visitors in your community?

Adapting products & experiences

- Can you make any immediate tweaks to your products that would increase the benefits for local people, diverse communities, and the environment?
- What about longer-term changes to the way you design and package tourism products and experiences in your community?
- Do any of your existing products tap into the demand for local and sustainable products and experiences?
- Can you think of any new products that you could develop that would align to this demand and shift toward sustainability?

Adapting Marketing strategies

- What is the visitor profile of the biggest market segment to your community?
- Would different types of visitors provide more value? Could you make any changes to your products to attract different types of visitors?
- Do you have strategies in place that target specific visitor groups who are more environmentally conscious?
- Do you have marketing strategies in place that boost the profile of sustainable products and experiences? E.g., cycling tours, local-food products, experiences that support local businesses or underrepresented groups or social entrepreneurs?
- Can you think of any small tweaks you can make to your marketing and communications that would boost the sustainability and resilience of your community?

Supporting businesses

- What existing financial support mechanisms are available?
- Are they being accessed by businesses?
- What new knowledge/skills might be required to improve sustainability and inclusion in tourism in your community or to respond to future challenges?
- What skills gaps are there?
- Where are the labor shortages?
- How can these needs/gaps best be addressed?

Olympic Peninsula Visitors Bureau,
Courtesy of State of Washington Tourism

Measuring success

- How will you define success?
- Do your chosen metrics address what is important?
- How much emphasis have you placed on effort vs effectiveness?
- Have you planned for baseline data collection as well as ongoing monitoring and measuring?
- Can you easily adapt?

A Checklist Of Questions To Ensure Your Plan Is Deliverable

This final section outlines some key questions that should be considered in reviewing your plan. Questions around capacity, resources and collaboration will help to ensure that the plans are both feasible and aligned at the destination level with other strategies.

Is everything in place to deliver your plan?

- Have residents, diverse community groups, important partners, and Tribal governments, and their priorities and perspectives been taken into account in developing the plan?

- Are roles and responsibilities for delivering and monitoring the plan clearly outlined, recognizing the contributions that the public and private sector will make?
- Is there sufficient capacity to deliver the plan– both in terms of staff resources and staff skill sets?
- Is there sufficient budget and/or access to finance to deliver the plan?
- Is the timeframe appropriate and are there key milestones to inform measuring progress?
- Are there ongoing communication mechanisms in place to ensure cross-sector alignment and collaboration (across the public, private and third sectors) to deliver the plan?
- Is the plan aligned with other community level strategies?

Once these key questions have been considered comes the most important step: the implementation of the plan! The plan should be considered a ‘work in progress’ that needs to be adapted according to the changing needs of the local community, the market, tourism businesses and ongoing national and global trends.



Congratulations! We hope that the information in this handbook has been helpful in supporting you to think about the overall goals for your organization and your community and how you can start to develop an action plan to help you to achieve these goals, ultimately increasing sustainability, inclusivity, and resilience for the future. And remember, planning is an iterative process, something you'll visit time and again to update and revise and refine, but the important thing is you've committed to this process of creating a better future for tourism in your community, and that's something to celebrate!

