



Professional Profile of the Silver Tourism Expert

The Silver Tourism Strategic Partnership

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Co-Authors



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Introduction

Objective

The objective of this deliverable is to define the specific framework of competences that Silver Tourism project will address. For this, based on a 'Design Thinking' methodology, a continuous process of co-creation at European level has been carried out, incorporating not only partners in the consortium, but also external experts (SMEs, trainers, teachers, ...).

The Professional Profile defines the complete set of knowledge, skills and competences that a Silver Tourism Expert should meet to carry out its work in a satisfactory way by following a European skills definition model.

Purpose of the Deliverable

The Deliverable presents the skills definition model, and refers to the professional profile of the Silver Tourism Expert. It provides the revised skills definitions in form of related skill card.

Background of the Silver Tourism project

Numerous studies confirm the trend that the income situation of the older generation has markedly improved within the last years, so the market for the Silver Economy is the beginning of an important development. According to the needs and preferences of Seniors, we can say that Tourism Sector has an important opportunity for developing new products oriented to this target.

The tourism sector is perhaps one of the most complex that there since it involves a whole range of related and intricate activities. For this reason, Silver Tourism stands on a double vision:

- 1) Continuous training, pushed by real demand of knowledge, usually leads to greater impact of vocational training. Through provision of non-formal training, accessible and

easy for anyone interested in getting knowledge pills to use in its daily work, workers not fully aimed at seniors can obtain skills to address this target.

- 2) Specialist vocational pathway, providing high quality training for experts on tourism development that serves to bring together stakeholders working independently, facilitating joint progress, increasing in this way the impact of this training.

Scope of the Deliverable

The deliverable contains

- A chapter about skill cards, skills definitions.
- Descriptions of the 5 learning units concerning the Silver Tourism Expert professional profile.

The deliverable does not cover:

- course development and maintenance.
- certification scheme and exam requirements.

Skill Cards in European Educational Strategies

Skills Definition Model

For developing the skill set of the Silver Tourism Expert we base on the skills definition proposed by the DTI (Department of Trade and Industry) in the UK for the NVQ (National Vocational Qualification) standards. These models have been re-used and slightly modified by other countries when they started employing skill cards.

A skills definition contains the following items (see Figure 1):

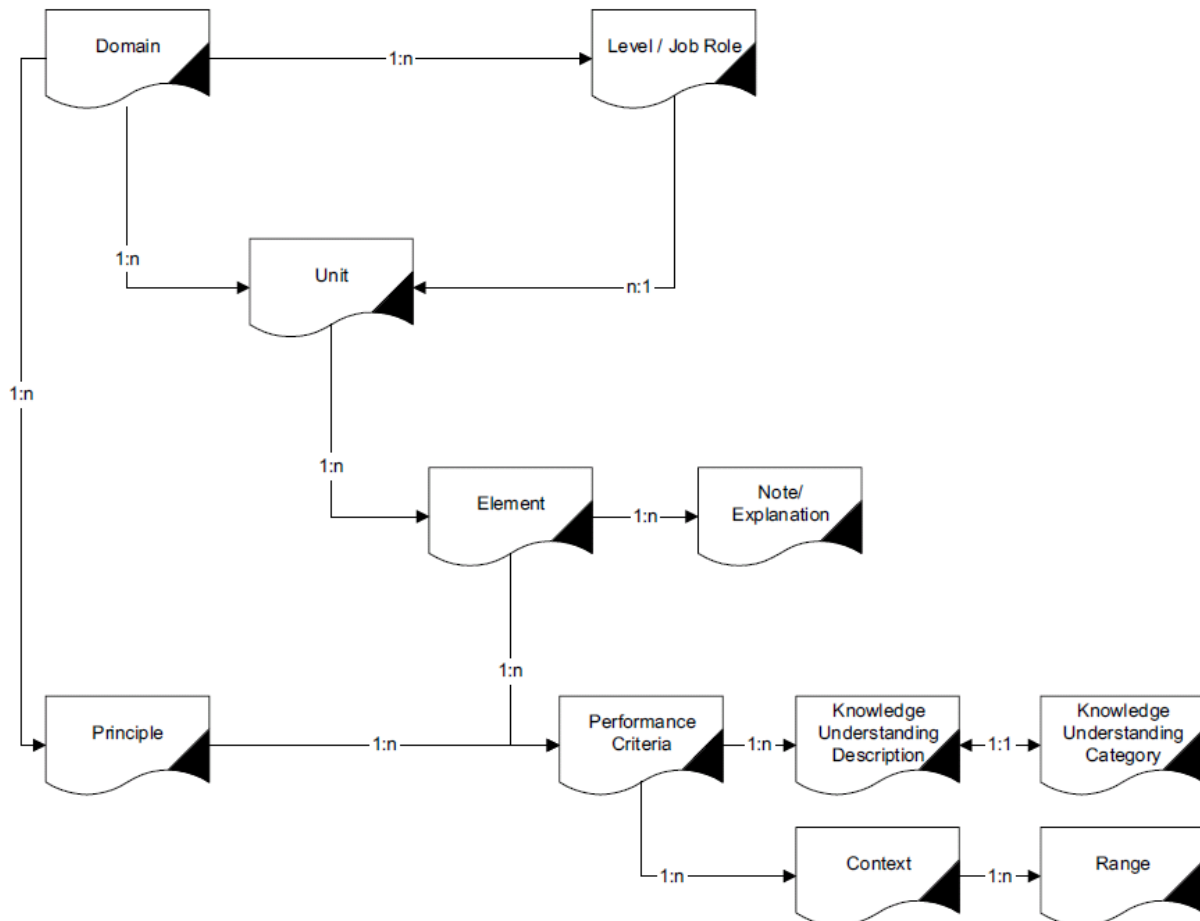


Figure 1: The Skill Definition Model (1:n = one to many relationship)

Context (UK standards): A category of ranges; it represents some terminology used in a performance criterion that consists of different context, conditions or circumstances. A participant must be able to prove competence in all the different circumstances covered by the context.

Domain: An occupational category; e.g. childcare, first level management or software engineering.

Element (UK standards): Description of one distinct aspect of the work performed by a worker, either a specific task that the worker has to do or a specific way of working. Each element consists of a number of performance criteria.

Evidence: Proof of competence.

Knowledge and understanding category (UK standards): A category of knowledge and understanding descriptions.

Knowledge and understanding description (UK standards): A description of certain knowledge and understanding. To be judged competent in a unit a participant must prove to have and to be able to apply all the knowledge and understanding attached to it.

NVQ (UK based): The National Vocational Qualification standard of England, Wales and N. Ireland.

Performance criterion (UK standards): Description of the minimum level of performance a participant must demonstrate in order to be assessed as competent. A performance criterion may have relevant contexts.

Principle (UK standards): A statement of good intentions; it underpins all competent domain practice.

Range (UK standards): Description of a specific circumstance and condition of a performance criterion statement.

Qualification: The requirements for an individual to enter, or progress within a certain occupation.

Qualification / training levels: Five levels of qualification / training are defined by European legislation and this structure can be used for comparability of vocational qualifications from the different European countries.

- Level 1: semi-skilled assistant performing simple work
- Level 2: basic employee performing complex routines and standard procedures
- Level 3: skilled professional with responsibility for others and performing independent implementation of procedures
- Level 4: middle management & specialist performing tactical and strategic thinking
- Level 5: professional / university level

Job Role: A certain profession that covers part of the domain knowledge. E.g. domain = Tourism Management, job role = Silver Tourism Expert.

Unit (UK standards): A list of certain activities that have to be carried out in the workplace. It is the top-level skill in the UK qualification standard hierarchy and each unit consists of a number of elements.

Skills Assessment Model

Step 1 – Browse a Skills Set: You select a set of skills or competencies, which are required by your profession or job using national standards or your company standards. You browse different skills cards and select a job role you would like to achieve.

Step 2 – Register for Self-Assessment with a Service Unit: This can be a service unit inside your own company (e.g. a personnel development department) or a skills card and assessment provider outside your company, which offers skills assessment services. In case of the Innovation Manager Project the registration will automatically assign a predefined service unit.

Step 3 – Receive an Account for Self-Assessment and Evidence Collection: With the registration you automatically received an account to login to the working space in which you can go through the steps of online self assessment and the collection of evidences to prove that you are capable of certain performance criteria.

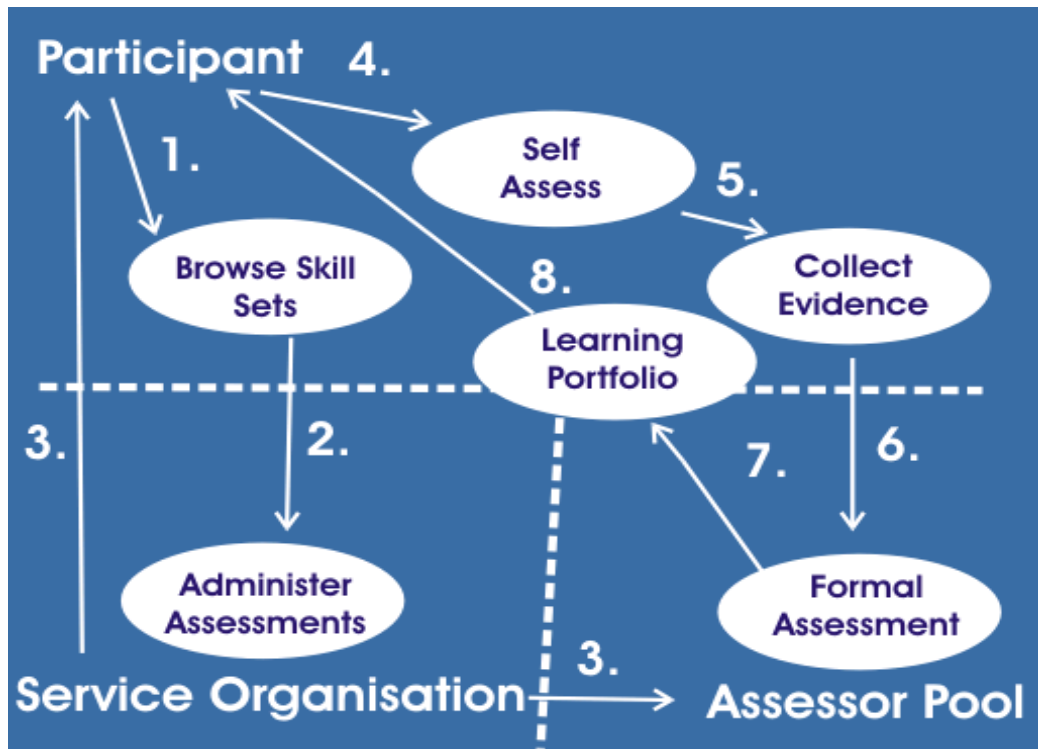


Figure 2: The Skills Assessment Model

Step 4 – Perform Self-Assessment: You log into the system, browse through the skills required and self-assess performance criteria, whole elements or whole units with a standard evaluation scale of non-applicable, not adequate, partially adequate, largely adequate, and fully adequate. A skills gaps profile can be generated and printed illustrating in which areas your self-assessment shows improvement potentials.

Testing of Skills (Addition to Step 4) – The system provides a multiple-choice test for each performance criteria so that you can check your capabilities as realistically as possible.

Step 5 – Collect Evidences: Before you want to enter any formal assessment you need to prove your skills by evidences. Evidences can be any electronic files (sample documents, sample graphics, results of some analysis, etc.) or any references with details (e.g. a certificate received from a certain institution). Evidences you can then link to specific performance criteria or whole elements of skills units.

Testing of Skills (Addition to Step 5) – In traditional learning schemes people have always needed to go to a learning institution (university, accreditation body, professional body, etc.)

to take exams and they received a certificate if they pass. This traditional approach however is insufficient when it comes to measuring experience and (soft) skills learned on the job and fails to give recognition to skills gathered on the job. The APL (Accreditation of Prior Learning) approach, by contrast, collects so called evidences. Evidences can be certificates obtained in the traditional way, but also references from previous employers, materials from previous projects in which the person took ownership of results (e.g. a test plan) to prove their capability, as well as any kind of proof of competence gathered on the job. The assessors will then evaluate the evidences provided and not only rely on certificates and exams.

Step 6 – Receive Formal Assessment: Formal assessors are assigned by the service unit to the skills assessment. Once formal assessors log into the system they automatically see all assigned assessments. They select the corresponding one and can see the uploaded evidences. They then formally assess the evidences and assess the formal fulfilment of performance criteria, whole elements or whole units with a standard evaluation scale of non-applicable, not adequate, partially adequate, largely adequate, and fully adequate. In case of missing competencies they enter improvement recommendations, as well as learning options.

Step 7 – Receive Advise on Learning / Improvement Options: After the formal assessment the participants log into the system and can see the formal assessment results from the assessors, can print skills gaps profiles based on the assessor results, and can receive and print the improvement recommendations and learning options. If required, the generation of learning options can also be automated through the system (independent from assessor advises).

The Skills Hierarchy for the Job Role “Silver Tourism Expert”

Using the terminology outlined in the skills definition model and including the skills identified during the demand analysis, the following skills hierarchy for the job role “Silver Tourism Expert” has been designed.

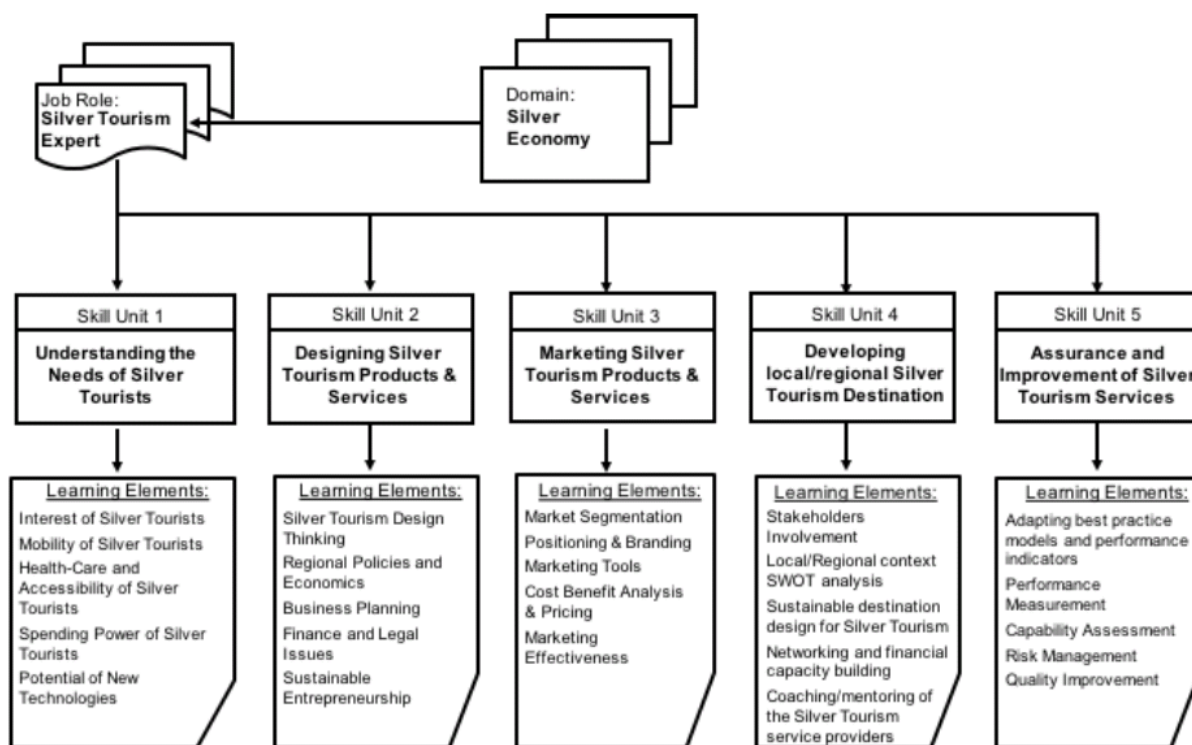


Figure 3: The Skill Card for Silver Tourism Expert

The Skills Descriptions – The Silver Tourism Expert Profile

Domain Acronym: SE

Domain title: Silver Economy

Domain Description:

Population ageing is a long-term trend that is dramatically changing the European society. Eurostat shows that people over 65 years will reach 28.7% of the European population (18.2% in 2013). Areas such as health, employment and social security are re-defining currently in line with demographic change, emerging strongly the notion of Silver Economy. This demographic situation is also having a considerable impact on the increase of the tourism demand. In this way, EC initiatives such as “Europe, the best destination for seniors”, “European Innovation Partnership on Active and Healthy Ageing” or “Calypso+” will contribute to the objectives of the Europe Strategy 2020. Europe is definitively showing the highest potential as source for senior travellers.

Job Role Acronym: STE.

Job Role Title: Silver Tourism Expert.

Description:

The tourism sector must face a redefinition of its products, services and activities to engage seniors out of their homes. Following the guidelines of “New Skills for New Jobs”, Silver Tourism addresses this challenge to contribute from the educational field (continuous training) in order to develop a new approach for developing skills/competences in this field, using innovative OER methodologies.

Silver Tourism involves a diverse range of economic activities (with their respective professional occupations): organized trips, local information, leisure activities, travel agencies, transportation, cultural heritage, ... and, of course, health and welfare, are activities that benefit an integrated

approach to senior tourists. The establishment of a EU partnership will ensure that results obtained has a significant impact.

The job role contains 5 major units:

STE.UNT – Understanding the needs of silver-age tourists and accompanying people,

STE.DPS – Designing Silver Tourism Products & Services,

STE.MPS – Marketing Silver Tourism Products & Services,

STE.DLR – Developing local/regional Silver Tourism Destination,

STE.AIS – Assurance and Improvement of Silver Tourism Services

The job role presumes previous pre-existing knowledge in the following fields:

- Basic knowledge about silver economy
- Basic knowledge about tourism management

Unit STE.UNT: Silver Tourism Expert – Understanding the needs of silver-age tourists and accompanying people

Acronym: STE.UNT

Title: Understanding the needs of silver-age tourists and accompanying people

Description:

From Silver Economy to Silver Tourism:

As stated in the EC background paper “Growing the Silver Economy in Europe”, the “Silver Economy” can be defined as the economic opportunities arising from the public and consumer expenditure related to population ageing and the specific needs of the population over 50. Silver Economy comprises a large part of the general consumer economy, but with considerable differences in spending priorities and patterns. It is driven by both, the emergence of new consumer markets and by the need to improve the sustainability of public expenditure linked to ageing. By 2020 the private spending power of the elderly generation will reach €15 trillion globally. As for public spending: in the EU it accounts for 25% of GDP or about 50% of general government expenditure and it is projected to grow by more than 4% of GDP until 2060.

The ageing population can be divided in 3 groups, active, fragile and dependant, each with their own pattern of needs. The Silver Economy markets must take into account functional impairments and accessibility requirements, such as those related to reduced vision, health, dexterity, mobility, cognitive performance.

Still according to the European Commission background paper on Silver economy, the 65+ population as a percentage of the population aged 15-64 is projected to increase from 26% in 2010 to 53% in 2016. In 2006, 1/5 of EU citizen has between 55 and 75 years old and the proportion will continue to increase in the coming years.

These demographic changes can be regarded as positive for tourism as they can in particular help to increase the number of tourists in low and off season in mountain areas.

Borja et al. (2002) have shown that the segment of adults over 55 years of age will increase the overall volume of tourism the most; these adults are characterised by extensive experience in tourism, making them more demanding consumers and allowing demand to shift away from peak seasons because this is a segment of the population that is often retired.

Thus, this is particularly relevant for tourism operators to develop their capacities to welcome senior tourists and to better know their needs, wishes, interests and motivations. The Silver Tourism Expert will be able to better understand and exploit the market potential represented by senior tourists.

Tourism industry needs to continuously improve the quality and mobility of its staff to provide top quality, personalised services to all tourists.

Adapting tourism to globalisation and new market demands requires that efforts are made to improve the professional skills of workers in the sector.

The workforce must adapt to new technologies and changes in customer expectations. In particular, this involves the demand for customised travel experiences that can be planned, recorded and, reviewed in across multiple digital platforms.

This is precisely the goal of this first unit, to train the Silver Tourism Expert to give him/her the key points to better understand the increasing market represented by silver tourists and to provide they key understanding tools (based on the Design Thinking methodology) to better apprehend this specific target group.

Thus, an in-depth analysis on the silver tourists will be done, to help him/her to better understand who the silver tourists and accompanying persons are. This would help the Silver Tourism Expert to better understand their needs, wishes, interests and motivations to travel and thus to better answer to their needs. The Design Thinking methodology will be used to learn how to develop a Profile Card Tool and a Motivation tool to facilitate this analysis, such as the Empathy map will be elaborated (Learning Element 1).

Then, the mobility patterns will be developed to better understand how silver tourists go to a tourism destination and how they move once they have reached their holiday destination. Alternative and innovative good practices will be presented to improve mobility especially in

rural and mountain areas, which are often heavily dependent on the individual car. The technique of individual and group interviews will be used to better understand the travelling patterns of silver tourists (Learning Element 2).

Senior mobility is often embedded by health problems: from minor health issues to major ones, tourism destination needs to develop accessible infrastructures and services to comfortably welcome their senior tourists and to answer to their specific needs. The difficulties to make a destination accessible will be assessed and solutions will be presented to facilitate destination accessible to all (Learning Element 3).

Senior tourists have different spending capacity, largely depending on their socio-economic development and if they are still working or not. Their financial means will determine to which extend they will be able to pay for additional services and products. The Silver Tourism Expert will gain a better knowledge on the spending capacity of these silver tourists and will learn how do an empathy map to estimate what are the missing services and products that the silver tourist will be ready to pay for (Learning Element 4).

Finally, the Silver Tourism Expert will learn how to engage into digital tourism and to make the best of Information and Communication Technologies to better inform about his/her destination but also to better answer to the needs of silver tourists. While the access to technologies can offer great development and new services, a good balance between technologies solutions and maintaining human relationship will be sought (Learning Element 5). It must be taken account that the trends in the tourist sector is to integrate the ICT in all stages, but silver tourists are less responsive to ICT that other generations.

Within this unit, some tools of the Design Thinking methodology will be introduced when relevant, but this methodology will be explained into details in the Unit 2.

This skills unit consists of 5 learning elements: Better Understand the Interest of Silver Tourists; Mobility of Silver Tourists and Accompanying persons; Health-Care and Accessibility of Silver Tourists; Spending Power of Silver Tourists; and Potential of New Technologies.

Unit STE.UNT-Element 1: Better Understand the Interest of Silver Tourists

Acronym: STE.UNT.BUI

Element Title: Better Understand the Interest of Silver Tourists

Element Principle:

The Silver Tourism Expert needs to gain an in-depth understanding of the motivations, interests, needs and expectations of the silver tourists and their accompanying persons. Silver tourists are not just normal tourists a little older than the others. Depending on their vulnerability and their health, their interests can be very close to other tourists or on the contrary they will have specific and different interests. A good understanding of motivations is essential to understanding the decision-making process of travellers and thus to adapt products and services to their specific needs. Motivations will depend on many factors including the person's sociocultural context, education and work environment.

Element note:

This first learning element will introduce the concept of Design thinking in order to integrate the Design Thinking Tools to better understand the interests of the silver tourists. In particular, the following specific issues will be addressed:

- Silver tourists: an increasing part of the tourism market
- How to better understand who the silver tourists are for one area /for one tourism operator? Introduction of the Profile Card Tool and Empathy Map
- The specific interests of silver tourists in general: motivations and tendencies to travel and when do they travel? The question of seasonality will be developed such as the type of destinations and activities depending of the different age groups.
- How to better integrate the motivations of the silver tourists into one specific area/one tourism operator? Introduction of the Motivations Matrix tool.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.UNT.BUI.PC1	<input type="checkbox"/> She/he knows the growing importance of silver tourists among all tourists
STE.UNT.BUI.PC2	<input type="checkbox"/> She/he knows the key motivations to travel per types of silver tourists (depending on their socio-economic profile)
STE.UNT.BUI.PC3	<input type="checkbox"/> She/he knows how to develop a profile card and an empathy map to better understand the relevant characteristics of the silver tourists
STE.UNT.BUI.PC4	<input type="checkbox"/> She/he knows how to develop a motivation matrix to better understand the needs of his/her silver tourists.

Table 1: Performance Criteria for the Element STE.UNT.BUI

Unit STE.UNT-Element 2: Mobility of Silver Tourists and Accompanying persons

Acronym: STE.UNT.MOB

Element Title: Mobility of Silver Tourists and Accompanying persons.

Element Principle:

The Silver Tourism Expert needs to understand how the silver tourists and accompanying persons arrive to a tourism destination: how do they travel (means of travels, specific mobility preferences, travel alone or in groups)? But also how do the silver tourists move (or not) during his/her stay in a tourism destination? What are the specific mobility issues that silver tourists face?

Element note:

This second learning element will present how silver tourists go to a tourism destination and move during their stay. In particular, it will take into account the specific situation of rural and mountain areas which have less public transport and thus have often more difficulties to provide alternative solutions for the silver tourists.

The following specific issues will be addressed:

- The mobility patterns to go to a tourism destination regarding the means of travel but also the tendencies of senior tourists to travel in groups/alone/with family. The specific case of lonely senior travellers will also be analysed.
- The necessity to develop innovative and alternative transport means, especially in rural and mountain areas will be explored, with the presentation of some good practices of the Move on Green and Access2Mountain Projects focusing on transport on demand, electric cycling, multimodal transport and car-sharing formula.
- The technique of individual and group interviews will be introduced to better understand the individual habits of senior tourists.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.UNT.MOB.PC1	<input type="checkbox"/> She/he knows the transport habits of the silver tourists
STE.UNT.MOB.PC2	<input type="checkbox"/> She/he knows the constraints that silver tourists face in their mobility
STE.UNT.MOB.PC3	<input type="checkbox"/> She/he knows how to conduct an interview to have direct feedback from the silver tourists
STE.UNT.MOB.PC4	<input type="checkbox"/> She/he knows good practices to encourage mobility in an alternative way, even in places where individual car is often the first transport mean.

Table 2: Performance Criteria for the Element STE.UNT.MOB

Unit STE.UNT-Element 3: Health-Care and Accessibility of Silver Tourists

Acronym:STE.UNT.HCA

Element Title: Health-Care and Accessibility of Silver Tourists.

Element Principle:

As seen in the first Learning element, senior tourists have specific characteristics that differentiated them from other tourists. One of them is their relative fragility and vulnerability regarding health, in comparison of other tourists' categories. Persons in a wheelchair, blind, deaf, with autism or mental illness... One in six persons in the EU has a disability from mild to severe, making around 80 million persons in Europe, who are often preventing from taking fully part in tourism. In addition, over a third of people aged over 75 have disabilities that restrict them to some extent, and over 20% are considerably restricted. Making touristic destinations accessible for all represents non only a key societal question, but also a great economic opportunity to welcome additional public and to ease life of all (including people with strollers, young children, or old people, even without disabilities).

Element note:

This third learning element will present how to take into account not only the question of health but also of accessibility for senior tourists.

The following specific issues will be addressed:

- From small to bigger health issues, the Silver Tourism Expert will have a panorama of the most common health problems that can prevent senior tourists to travel.
- Senior tourists who have mobility issues or specific handicaps (blind, deaf...) need to obtain enough information before deciding going to a destination. Based on the "Six Phases of the Visitor Journey, Considering the Need for Information about Accessibility

and Appropriate Access Measures”, the Silver Tourist Expert will better understand how to give enough information on the accessibility of a destination.

- Based on the “Mapping and Performance check of the supply of Accessible Tourism services in Europe” study done by the European Commission in 2015, this Learning element will focus on the difficulties and barriers for industry (especially SMEs) in providing accessible services.
- This learning element will also focus on the practices and tools that can increase accessibility based on good practices.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.UNT.HCA.PC1	<input type="checkbox"/> She/he knows the common health problems that have impact on the good or bad experience of the silver tourists
STE.UNT.HCA.PC2	<input type="checkbox"/> She/he knows the difficulties to develop accessible services and products for all
STE.UNT.HCA.PC3	<input type="checkbox"/> She/he knows specific solutions on how to provide an accessible service or product for all senior tourists

Table 3. Performance Criteria for the Element STE.UNT.HCA

Unit STE.UNT-Element 4: Spending Power of Silver Tourists

Acronym: STE.UNT.SPS

Element Title: Spending Power of Silver Tourists.

Element Principle:

The Silver Tourism Expert needs to explore the financial capacities of silver tourists. Silver tourists have a spending power that often depends on their situation: if they are still active or not, if their socio-economic conditions were good during most of their life or not. The European Commission is also developing social tourism for seniors, with limited financial spending capacity, with the CALYPSO initiative for instance.

Element note:

This fourth learning element will present the spending capacity of silver tourists. It will focus on the economic impact of silver tourists in tourism in general and their tendencies to spend (in terms of accommodations, activities, transport). This will allow the Silver Tourism Expert to better define where the silver tourists are the readiest to spend their money during their holidays.

The following specific issues will be addressed:

- The spending capacity of senior tourists versus spending capacity of other tourists will be explored.
- The spending capacity of senior tourists per type of costs (travel, accommodations, restaurant, leisure activities) will be developed to see where senior tourists are the readiest to spend their money.
- The question of social tourism for seniors will also be developed with the different European initiatives (CALYPSO, COSME).

- What are the services and products that silver tourists would be ready to pay for? The Empathy Map tool will be introduced to better define the needs which are not well covered by silver tourists so far.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.UNT.SPS.PC1	<input type="checkbox"/> She/he knows the financial potential offered by silver tourists
STE.UNT.SPS.PC2	<input type="checkbox"/> She/he knows on which types of costs the silver tourists are ready to spend more
STE.UNT.SPS.PC3	<input type="checkbox"/> She/he knows the different EU schemes that can be mobilised to develop social senior tourism
STE.UNT.SPS.PC4	<input type="checkbox"/> She/he knows how to develop an empathy map to better identify the unanswered needs of silver tourists

Table 4: Performance Criteria for the Element STE.UNT.SPS

Unit STE.UNT-Element 5: Potential of New Technologies

Acronym: STE.UNT.PNT

Element Title: Potential of New Technologies.

Element Principle:

ICT (Information and Communication Technologies) are more and more used by customers to prepare their travel and book accommodation ahead of their stay, to get practical information through their mobile phone during their stay and to share their impressions on the visited destinations during and after their stay, thanks to social networks notably. The customer's increasingly influential role in the tourism purchasing cycle has resulted in a constantly changing market place, in which the consumer/actor is becoming the most important player. The Silver Tourist Expert needs to know how to make the best of these technologies and to reach its target group. In addition, new technologies have been developed that can help the silver tourists to ease their travel or to enjoy more peacefully their travel (devices to monitor health for instance). But the Silver Tourist Expert needs to keep in mind that for this group of consumers ICT literacy may be below the average of the population and to be able to use these technologies, a very good, easy and free access to High Speed Internet is needed for the tourists.

Element note:

This fifth learning element will present the new opportunities offered by ICT and new technologies in general which enable to easily reach senior tourists and engage them into active tourists that can easily and quickly provide their feedback of the tourism products and services used.

The following specific issues will be addressed:

- The potential offered by the new ICT tools to engage the tourists to have more active interactions with the tourism operators through the example of the DANTE project.
- Good examples of how technology can facilitate the travel and stay of senior people will be presented.

- The role of digital tourism with the EU initiative “The ICT for tourism businesses initiative” will be developed.
- Seniors often like to maintain some interactions with people, thus the necessity to maintain contact with real people versus a full technology process will be explained, insisting on the psychological aspects of the senior tourists.

This learning element will thus help the Silver Tourism Expert to strengthen his/her digital skills and will offer a chance to take full advantages of the opportunities provided by the digital market to increase the competitiveness and attractiveness of tourism operators.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.UNT.PNT.PC1	<input type="checkbox"/> She/he knows how to simply and efficiently used ICT tools to reach senior tourists
STE.UNT.PNT.PC2	<input type="checkbox"/> She/he knows how to actively engage senior tourists to invite them to give feedback on their services and products
STE.UNT.PNT.PC3	<input type="checkbox"/> She/he knows good examples on how to introduce technologies to ease the life of senior tourists
STE.UNT.PNT.PC4	<input type="checkbox"/> She/he knows how to maintain a good balance between human interactions and the level of technologies used to please senior tourists

Table 5: Performance Criteria for the Element STE.UNT.PNT

Unit STE.DPS: Silver Tourism Expert - Designing Silver Tourism Products & Services

Acronym: STE.DPS

Title: Designing Silver Tourism Products & Services

Description:

A product is an object created by a manufacturing process. The concept of tourism product refers to the activity that people make when they visit a place that is not their own, either for leisure, culture, business, etc. Thus, the tourism product covers both physical goods and services that characterize the destination, forming all part of the tourist experience.

The tourism product has tangible components (natural environment, cultural heritage, ...) but also intangibles (hospitality of the people, quality of care, ...), establishing its characteristics by the interaction and combination of all these components. We can say that the tourism product includes all elements that enable the development of tourism. We must consider that any tourism product has the following characteristics:

- Intangibility, which means that we cannot touch, smell or feel.
- Expiration, because we cannot be inventoried for later use.
- Heterogeneity, which means it consists of a wealth of values and elements that depends on who provides them or when they are made.
- Inseparability, since they cannot be separated from who are their suppliers.
- Discontinuity, because demand variability alternately creates waiting lines, or idle services resources.
- Instantaneity, because oftentimes services are created and at the same time delivered.

Tourism specialists say that travelers are always looking for tourism products instead of tourist destinations, ie, that they are not satisfied with a single aspect of the destination they are visiting,

but enjoy living a full experience in all aspects. For this reason, communities when they consider how to attract visitors, should develop a comprehensive strategy that allows them to offer a quality tourism product. Similarly, when a single business looks for design a product, should develop a complete definition of how its environment can be related with its product/service.

This unit will study how to design a tourism product/service through the most efficient methodologies used in the business world. Particularly, the study will focus on the knowledge of the Design Thinking and Business Model Canvas methods as well as multiple tools for generating ideas, creativity, or business design. Naturally, we are looking for the viability of our value proposition both economically and legally. Finally, aware of the importance of linking our product to the location where we are, we will consider the political, economic and social environment, including our social responsibility in social progress and environmental sustainability.

The "Silver Tourism Expert - Designing Silver Tourism Products & Services" skills unit consists of 5 learning elements: Silver Tourism design thinking; External Context Analysis; Business Planning; Emotional Design; and Corporate Social Responsibility.

Unit STE.DPS-Element 1: Silver Tourism Design Thinking

Acronym: STE.DPS.DTH

Element Title: Silver Tourism Design Thinking.

Element Principle:

The definition of "Design Thinking" according to Tim Brown¹ is: "design thinking is a human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success". All experts would agree on the following definition on what is the Design Thinking methodology: "a good tool to find a creative solution to a problem"².

This methodology is particularly suitable for generating innovative ideas that focus their effectiveness in understanding and solve the real needs of users. Some key elements of the DT methodology are:

- Teamwork
- Empathic observation
- Inspiration
- Idea generation
- Prototype ideas, bring them to the market and change the world

Design Thinking is a process, groups of methods and tools which allow us to generate innovations, new products and new services. This process is composed by six steps: Empathize, Define, Ideate, Prototype, Test, and Implement.

¹ Tim Brown, president and CEO of IDEO, the most important consulting in this topic.

² <http://www.centrodeinnovacionbbva.com/noticias/creatividad-y-empatia-claves-para-aplicar-la-metodologia-design-thinking>

Element Note:

The Design Thinking process first defines the problem and then implement the solutions, always with the needs of the user in the centre of the solutions. This process focuses on need finding understanding, creating, thinking, doing and evaluating. At the core of this process is a bias toward action and creation: by creating and testing something, you can continue to learn and improve upon your initial ideas. This process is structured in 6 steps:

- **Empathize.** It is based on understanding (statement of the problem), looking at the problem from the point of view of the user, reaching empathy with through listening and observation. Empathizing (immersing ourselves in external experiences) we will know all the characteristics of our target audience, their motivations, needs, shortcomings, ... Tools such as empathy maps, interviews and questionnaires will support us to carry out this step.

- **Define.** Once we have met customer needs, we must address it, developing a product/service tailored for them.

To define is proposed to determine our objectives and synthesize the findings from our previous empathy work in order to form a user point of view with which we will address our design.

- **Ideate.** Once we have defined our plan to address the customer needs we need to generate as many ideas as possible, allowing us to step beyond the obvious and explore a wide variety of possible solutions.

The ideate phase is the time of using creativity, knowing and hybridising sectors to provide a complete itinerary adapted to all users needs. Tools such as SCAMPER or inspiring stories can contribute us to capture resonant ideas and feelings in the way that our users have. The extreme users are also part of our design, where all barriers, physical or otherwise, will be covered.

- **Prototype.** A prototype is an early sample, model or release of a product built to test a concept or process or to act as a thing to be replicated or learned from³.

As we are launching our product/service, we should always be aware that we need to improve our prototype. We will define new aspects previously unidentified and making improvements aimed at better suit the market so that we can achieve our goals. One of the main tools to use when we perform a service is the Customer Journey Map.

- **Test.** When we interact in the market using our prototype, we get a feedback that will be collected, determining the fulfillment of the objectives. Our test phase will serve to try out high-resolution products, using the observations and feedback to refine prototypes, learning more about the user.

A constantly evaluation is the key to project well done, where it is analyzed all aspects and step is taken to the implementation of a product/service perfectly adapted to all customers and their case series. Tools such as Story Boards or Value Proposition Canvas will serve us to test what happens when we offer our product/service and identify what is the core of our business.

Design Thinking method gives us constant feedback. Thus, when we move to the next stage we can pivot our project, redirecting our design, always based on real evidence. Therefore, DT is the most used and effective tool for creating products and services.

- **Implement.** This means incorporating our product to the market once the design process has been completed. With the previous DT process we have further assurance that our product/service has been adapted to our target audience, that it works and it has been successfully designed and tested.

Still, the implementation is not the end because the assessment remains, restarting the process if necessary.

³ Blackwell, A.H.; Manar, E., eds. (2015)

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DPS.DTH.PC1	<input type="checkbox"/> She/he knows how to be able to empathize with the users, understanding and putting him/herself in their situation to meet their needs, tastes and preferences
STE.DPS.DTH.PC2	<input type="checkbox"/> She/he knows how to define a product/service, identifying key issues, simplifying processes and organizing all the elements involved
STE.DPS.DTH.PC3	<input type="checkbox"/> She/he knows how to generate new ideas that allow more efficient and effective solutions to incorporate our design
STE.DPS.DTH.PC4	<input type="checkbox"/> She/he knows how to plan the development of a product/service from the beginning (inputs) to delivery (outputs)
STE.DPS.DTH.PC5	<input type="checkbox"/> She/he knows how to test a product/service by the target audience, monitoring to identify weaknesses as a way to redefine for improvement
STE.DPS.DTH.PC6	<input type="checkbox"/> She/he knows how to constantly improve a product/service, innovating to adapt it to market trends

Table 6: Performance Criteria for the Element STE.DPS.DTH

Unit STE.DPS-Element 2: External Context Analysis

Acronym: STE-DPS-ECA

Element Title: External Context Analysis.

Element Principle:

When a person thinks about designing a new business, or a new service, he/she must consider not only intrinsic factors since all our action shall be evaluated by the market (society). Society as a whole, or any part thereof, will determine whether we succeed or not, that is, if our proposal is useful. But the market economy usually presents failures or imbalances that justify public intervention in the economy. This intervention is structured at various levels in policies that seek to distribute wealth and alleviate unjust situations and promote sectors deemed strategic. Public policies modulate the market, so we should know the trends that set such actions to take them into account when defining how to develop our business and prevent contingencies.

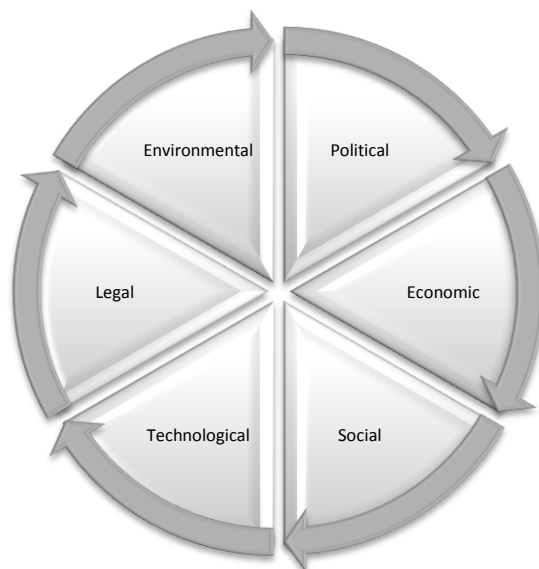
Element Note:

Society, and thus the market, is constantly changing, forcing suppliers of products and services to innovate constantly, either to follow the market needs either to stay ahead of competitors and offer goods to provide additional benefits. An external analysis will help the designer to determine what opportunities and strengths can exploit to take advantage obtaining successful products as well as to identify both barriers (social, culture, ...) and legal issues which can impede developing regular transactions.

PESTLE is an analytical tool, often used when launching a new product or service, which considers all these external factors and their impact on a location, organisation or business, being an useful method for understanding the environment in which the product/service is provided.

The student should be able to complete a comprehensive framework around the following external factors:

- Political factors: regional policies, bureaucracy issues, ...
- Economic factors: taxation, financing, exchange rates, cost of living, ...
- Social factors: lifestyle, education, demographics, cross-cultural communication, ...
- Technological factors: production efficiency, R&D, outsourcing, ...
- Legal factors: consumers' rights, health and safety, ...
- Ethical / Environmental factors: infrastructure, social implications, ...



Through this analysis the student must identify issues that are beyond his/her control and also will take any impact on his/her work. To do that, the Silver Tourism expert should also be aware of the specific externalities affecting specially the senior target audience. In this regard, issues such as legislation against age-based discrimination, policies to promote active aging, or public provision of health services and social protection are key elements in understanding the context in which a product/service must operate.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DPS.ECA.PC1	<input type="checkbox"/> She/he knows how to take advantage of policies to plan business with successful perspectives and obtaining synergies with local/regional public and private complementary initiatives
STE.DPS.ECA.PC2	<input type="checkbox"/> She/he knows how to take advantage of social environment to involve stakeholders in designing of experiences for users
STE.DPS.ECA.PC3	<input type="checkbox"/> She/he knows how to take advantage of technological trends to address its target audience with better solutions
STE.DPS.ECA.PC4	<input type="checkbox"/> She/he knows how to respect applicable legislation and social ethics in the external environment to prevent incidents

Table 7: Performance Criteria for the Element STE.DPS.ECA

Unit STE.DPS-Element 3: Business Planning

Acronym: STE.DPS.BPL

Element Title: Business Planning.

Element Principle:

When a business idea arises often seems bright, but it is necessary a detailed study to not rush and fail in our business. When we develop a business plan, we are studying multiple points, such as market analysis, potential customers, products or services that we will offer, prices to apply, ... all this establishing a strategic way (the business model) to follow and achieving goals in the short and medium term that will help us to measure our results.

A business plan, in addition to help entrepreneurs to define its idea and serve as a guide for its development, is the presentation card for external stakeholders (mainly investors, banks, partners, ...).

Element Note:

Traditionally, developing a business plan involves a series of rules or standards that affect the formale aspect, as the vocabulary used, the internal structure of the document, the contents of each section or manner of presentation.

However there is great freedom of development depending on the purpose pursued by our plan, people to whom it is addressed, the degree of development of the project or type of business. For this reason, for Silver Expert in Tourism it has been considered advisable to use the Business Model Canvas.

The Business Model Canvas, created by Alexander Osterwalder, allows graphically working on our business plan and easily explain. He says: "the best way to describe a business model is break it into nine basic modules which reflect the logic that follows a business to obtain income.

These nine modules cover the four main areas of business: customers, supply, infrastructure and economic viability⁴. The Model Canvas is worked through 9 different boxes:

□ **Key partners**

Under an approach based on "open innovation" is feasible to identify and establish partnerships with others to share our "business model" so as to allow us to generate synergies and add value, sharing risks and uncertainties too. We talk about strategic partners, investors, complementary partners, suppliers, ...

□ **Key activities**

This is one of the most difficult pieces to define within a business model because it depends on knowing what we are and what we want to achieve. To do this we must to identify the core of our business, what is really important, what makes us what we are, what is the reason why we are identified in the market and we should don't put in the hands of third parties in any case.

□ **Key resources**

To develop our value proposition we must to know resources and means we need. We can consider the following types of resources:

- Physical resources
- Intellectual resources (patents, data, brands, ...)
- Human resources
- Financial resources

□ **Value proposition**

Our value proposition is that by which the user makes us different from the competitors and is willing to pay. If the user does not consider our proposal, maybe you can have the

⁴ Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers. (A. Osterwalder)

best idea in the world but it has no value, or at least sufficient value to warrant production.

The differentiation of our proposal can come from the hand of a novelty, but also an improvement in quality, different design, best price, brand image, accessibility, usability, ...

□ **Customer relationship**

At this point we define the type of relationship we would seek with each of the target audiences. The key is how we will connect the value proposition to the customer. Among the types of relationships we can find: personalized services (one-to-one), outsourced (using a partner), collective (by user communities), in co-creation (do-it-yourself), restricted to final consumers (B2B),...

□ **Channels**

This box includes both the channels that we use to explain to our users what is our value proposition (communication channels) and to offer them (sales and after-sales). We can structure this process in the following steps:

1. Awareness. How to make the customer has in mind our product/service?
2. Evaluation. How to help the client to assess our value proposition?
3. Purchase. How can we allow the customer to purchase our product/service?
4. Delivery. How we deliver our product/service to the user?
5. After sales. What support we offer after the sale?

□ **Market segments**

Customers are the centre of any business model, being more important than our value proposition. We must focus our project on the client rather than the product.

But we must also select what will be our target customer as not all customers will value the same way the value proposition. Different customers will appreciate different proposals. Thus, we can guide this section to study whether we will focus on:

- Mass markets
- Niche markets
- Customer segmentation
- Diversification ...

□ **Cost structure**

In this section we will study the following characteristics of our business model:

- Fixed costs
- Variable costs
- Economies of scale
- Economies of scope

Thus, we can guide our approach towards a model based on cost (extensive outsourcing, low prices, standardization, ...) or value (premium segment, personalization, ...).

□ **Income sources**

Income is the result of everything else, that is to develop a product/service for which customers are willing to pay a price. However, before starting to offer our value proposition we should know what are our income sources because from it will depend the viability of our business.

Here we identify how much different customers are willing to pay because of our value proposition, how will do it, coordinating the different forms of income so they do not harm the other (if any).

We can define various types of income: pay-per-use, subscription fee, rent, license, fee, ..., although the main one is the fixed price (which we can segment in different ways) or variable price.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DPS.BPL.PC1	<input type="checkbox"/> She/he knows how to identify and coordinate key sources, partners and activities to develop a product/service in the best way
STE.DPS.BPL.PC2	<input type="checkbox"/> She/he knows how to understand the market and their customers, generating value proposals interesting for them
STE.DPS.BPL.PC3	<input type="checkbox"/> She/he knows how to define relationships and channels with customers in order to communicate them easily both tangible and intangible products
STE.DPS.BPL.PC4	<input type="checkbox"/> She/he knows how to establish a balanced cost structure and provide income that allows sustainability to our project
STE.DPS.BPL.PC5	<input type="checkbox"/> She/he knows how to define a structured and comprehensive business plan

Table 8: Performance Criteria for the Element STE.DPS.BPL

Unit STE.DPS-Element 4: Emotional Approach To Design Products and Services

Acronym: STE.DPS.EMO

Element Title: Emotional Approach to Design Products and Services.

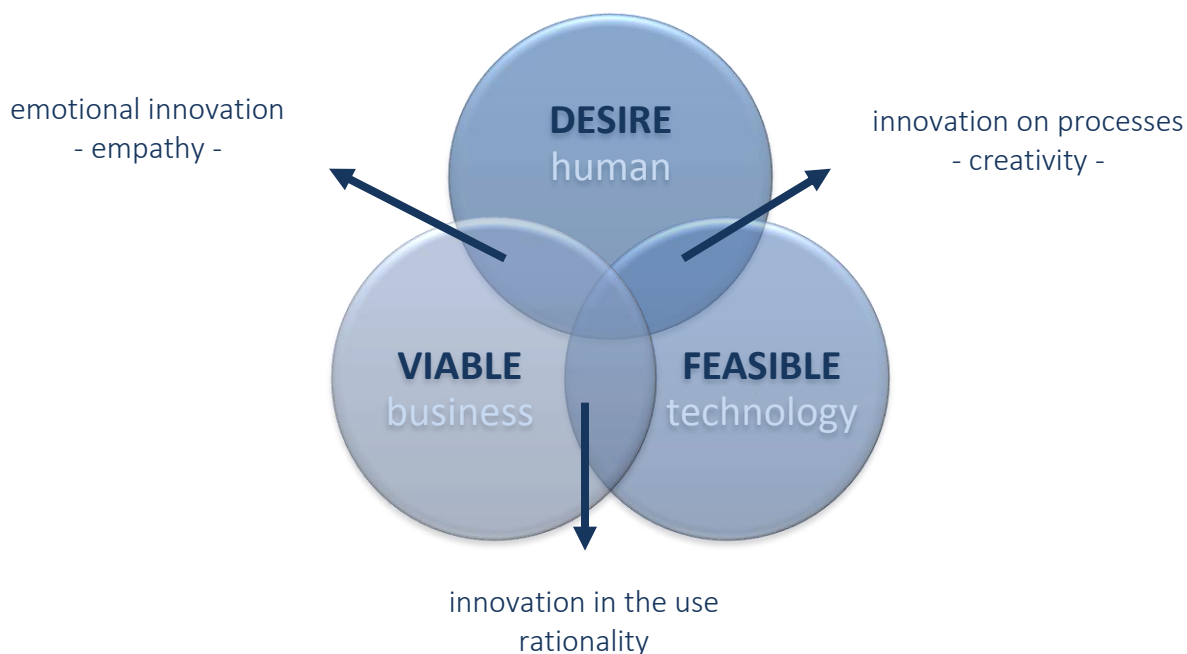
Element Principle:

Silver Tourism is a project that tries to put the senior public at the center of the design of products and services related to the tourism sector. For this reason, methodologies like Design Thinking are ideal for achieving this goal.

In all methods that involve the client in the design process, the concept of emotional design arises, that is, everything that goes beyond the strictly technical-technological scope to include also the so-called user experience. In this sense, it has been considered necessary to dedicate a learning element exclusively oriented to know which aspects are related to the field of Emotional Design.

Element Note:

The product design must be focused on the user to be successful in the market. Usually the designer thinks that a service must be aimed at addressing "needs". That is true, but not everything is focused on the physical utility (value proposition) delivered but also the emotional factor is decisive in achieving an innovative design.



While the technological feasibility can be validated through Design Thinking (particularly through the prototyping step) and economic viability through the study of the business model, it is necessary to make an extra effort to understand how emotions play an important role in the process of empathizing with the user and to strengthen the value proposition.

Through the technological feasibility and economic viability it is possible to incorporate innovation in the use of the product. This type of modifications are made from a purely rational approach, mainly oriented to provide utility to users, that is, to satisfy their needs. Examples of this type of innovation are the transfer of best practices from a sector of activity to another.

The importance of the emotional factor in the innovative design is demonstrated by the interaction between human factor and the other two. An innovation in processes arises from technological feasibility and creativity applied to re-define processes, providing innovations on how our product or service is performed.

When a business establishes connection with the user's desires there is an empathizing process that allows not only offer useful products and services, but also improve the user experience by incorporating emotional elements.

This unit is aimed at providing knowledge on the field of emotional design. The Emotional Design refers to all those aspects of designing products and services that creates links with the user, beyond the rational. Through this unit the student will be aware of the potential of emotional approach applied to design touristic products and services specifically aimed at Silver target, giving sensations and feelings as another way to enhance the value proposal offered.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DPS.EMO.PC1	<input type="checkbox"/> She/he knows how emotions work and the different theories about it, how it affects the consumer, and how product and service design can address this issue
STE.DPS.EMO.PC2	<input type="checkbox"/> She/he knows what the user's experience is and what factors constitute it
STE.DPS.EMO.PC3	<input type="checkbox"/> She/he knows how to measure the emotional elements that affect a product or service

Table 9: Performance Criteria for the Element STE.DPS.EMO

Unit STE.DPS-Element 5: Corporate Social Responsibility

Acronym: STE.DPS.CSR

Element Title: Corporate Social Responsibility.

Element Principle:

The term sustainable entrepreneurship has a close relationship with the so-called Corporate Social Responsibility (CSR). We can define CSR as the active and voluntary contribution of business to social, economic and environmental improvement, usually in order to improve their public image, competitive situation and added value.

Therefore, the aim is to achieve a triple positive result (social, economic and environmental) that will ensure current and future sustainability, promoting economic and social progress, and respecting natural ecosystems.

Element Note:

The manager must know the indicators, resources and actions that determine the triple result. Since the economic dimension has been previously described, we focus only on the social and environmental dimensions.

□ **Social dimension**

Responsible management of the business involves reconciling its own interests and expectations of the community. For this is essential to know the ethical responsibilities of a business:

- Serve the society with products/services useful and fair conditions.
- Respect human rights with decent working conditions that promote health and safety, as well as human and professional development of employees and collaborators.

- Comply with laws, regulations, norms and customs in a rigorous way, respecting the legitimate contracts, agreements and commitments.
- Seek equitable distribution of the wealth generated.
- Maintain business ethics and fight corruption.
- Supervise health and labor conditions of employees.
- Design and implement strategies for partnership and collaboration.

Environmental dimension

- Respect the environment avoiding where possible any contamination, minimizing waste generation, using clean energies and rationalizing the use of natural resources.
- Comply with environmental legislation.
- Manage and evaluate the use of resources and waste.
- Efficient use of water and energy.
- Combat climate change by reducing CO2 emissions.
- Assess and prevent environmental and social risks.
- Involve consumers, local communities and others in environmental responsibility.
- Involve employees in best practices of CSR.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DPS.CSR.PC1	<input type="checkbox"/> She/he knows and understands the importance of

	considering the triple bottom line: economic, social and environmental
STE.DPS.CSR.PC2	<input type="checkbox"/> She/he knows how to define a strategy for Corporate Social Responsibility as well as how to measure its results
STE.DPS.CSR.PC3	<input type="checkbox"/> She/he knows how to establish an appropriate management of human resources and relationships with external collaborators
STE.DPS.CSR.PC4	<input type="checkbox"/> She/he knows how to establish appropriate messages to raise awareness of both social and environmental issues
STE.DPS.CSR.PC5	<input type="checkbox"/> She/he knows how to improve internal processes in order to achieve a better management of resources

Table 10: Performance Criteria for the Element STE.DPS.CSR

Unit STE.MPS: Silver Tourism Expert – Marketing Silver Tourism Products & Services

Acronym: STE.MPS

Title: Marketing Silver Tourism Products & Services.

Description:

In order to achieve an advanced level of the Silver Tourism Expert profile, understanding of fundamental and in-depth marketing skills regarding Silver Tourism are required. As an expert it is important to understand the challenges that come with marketing to this specific target market. Also general knowledge on how to systematically market products and services are crucial in successfully marketing your products and services.

This unit focuses on marketing Silver Tourism products & services and is divided in five learning elements: market segmentation, positioning & branding, marketing tools, cost benefit analysis & pricing and marketing effectiveness.

Market Segmentation focuses on the STP-process, which refers to the process of (1) segmentation, (2) targeting and (3) positioning, whereby it concentrates on the first two steps. The STP-process is considered a key concept in the study and application of marketing. It shows how an organization chooses to compete within a potential target market, in this case the Silver Tourism market.

Positioning & Branding deals with the last step of the STP-process – positioning. Rules and industry examples give insight in how to position your product, service or destination. Methods include a competitor analysis, the perceptual map, brand building essentials and product pitching.

Marketing Tools gives a theoretical introduction in traditional marketing and digital marketing (e-marketing). By providing several marketing tools, including low cost marketing solutions, the

student will be able to effectively communicate his/her products or services to the chosen Silver Tourism market segments.

Cost-Benefit Analysis & Pricing educates the student in how to price a product to be both competitive and profitable. Furthermore, this element introduces the student to a cost-benefit analysis (CBA) which is a systematic process for calculating and comparing benefits and costs of a project or decision (product, service or destination related to Silver Tourism). A cost-benefit analysis helps to predict whether the benefits of a decision outweigh the costs.

The last learning element, Marketing Effectiveness, helps to control the outcome and assists the student in using pre-emptive methods when marketing his/her product, service and/or destination. Marketing Effectiveness includes how to draw up action plans, result measurement, setting realistic timeframes, budgeting and evaluation & revision methods.

The advanced level of the Silver Tourism Expert profile covers in-depth marketing techniques. In order to develop this knowledge, understanding of marketing essentials, such as basic marketing theory in the field of creating consumer value and awareness, a brief overview of marketing in silver tourism and an introduction to the marketing plan is a necessity. The marketing plan can be structurally approached by a set of different stages. It is recommended to follow the steps one by one in order to create the most complete plan. The seven stages are described as following:

Stage	Direction
1. Business Profile	<ul style="list-style-type: none"> <input type="checkbox"/> Describe your business – what you do and how your product or service is different to other <input type="checkbox"/> Who are the current business owners <input type="checkbox"/> What product/service you deliver <input type="checkbox"/> Business vision – briefly outline your future plans based on the goals and aspirations of the business <input type="checkbox"/> Business goals – include short and long-term goals and what activities you will undertake to meet them <input type="checkbox"/> Business mission statement – how will you achieve your vision

2. Situation Analysis	<ul style="list-style-type: none"> <input type="checkbox"/> Describe key external environmental factors <input type="checkbox"/> Describe key internal environmental conditions <input type="checkbox"/> Develop a SWOT (strengths, weaknesses, opportunities and threats) matrix
3. Research	<ul style="list-style-type: none"> <input type="checkbox"/> Identify your competitors and how they market their products <input type="checkbox"/> Research the marketplace and identify consumer and travel trends <input type="checkbox"/> Review your business and identify how your business meets consumer expectations through customer feedback <input type="checkbox"/> Understand who your existing customers are and their preferences, motivations and habits <input type="checkbox"/> Research the destination brand, hero experiences and destination tourism plan for your region so you can align and leverage the work of others
4. Market Identification	<ul style="list-style-type: none"> <input type="checkbox"/> Select your target markets <input type="checkbox"/> Research how your target markets behave and how to identify their needs
5. Marketing Mix	<ul style="list-style-type: none"> <input type="checkbox"/> Product and services – how your product/service meets the needs and expectations of your target markets <input type="checkbox"/> Price – how you price your product/service to be both competitive and profitable <input type="checkbox"/> Place – how you distribute your product and services <input type="checkbox"/> Promotion – how you convey your messages to your customers
6. Action Plan	<ul style="list-style-type: none"> <input type="checkbox"/> Describe your key strategies <input type="checkbox"/> List the actions you need to undertake to fulfil the strategies <input type="checkbox"/> Decide how you will measure your results and level of success <input type="checkbox"/> Set realistic timeframes for achieving your outcomes <input type="checkbox"/> Set a budget for each action so you can keep control of expenditure
7. Monitoring and Review	<ul style="list-style-type: none"> <input type="checkbox"/> Evaluate activities, measures and results <input type="checkbox"/> Review and revise plans

Figure 4: Marketing Plan Overview. Source: Tourism & Events Queensland (2015) The Big Marketing Guide.

The "Silver Tourism Expert - Marketing Silver Tourism Products & Services" skills unit consists of 5 learning elements: Market Segmentation; Positioning & Branding; Marketing Tools; Cost Benefit Analysis & Pricing; and Marketing effectiveness.

Unit STE.MPS-Element 1: Market Segmentation

Acronym: STE.MPS.MSG

Element Title: Market Segmentation.

Element principle:

Market segmentation is central component of the STP process, which refers to the process of (1) segmentation, (2) targeting and (3) positioning. The STP process is considered a key concept in the study and application of marketing. It shows how an organization chooses to compete within a potential target market. This unit's element focuses on the first two steps of the STP process – segmentation and targeting.

Element note:

The first step is to segment the potential target market into smaller markets, followed by a selection of one or more of the smaller target markets. Lastly, the company decides on how to position themselves in relation to the chosen markets. This process leads to the development and implementation of an appropriate marketing mix.

This element is directly linked to *step 3. Research* and *step 4. Market identification* of the marketing plan as referred to in the Introduction Unit and covers the following topics:

3. Research	<ul style="list-style-type: none"> <input type="checkbox"/> Identify your competitors and how they market their products <input type="checkbox"/> Research the marketplace and identify consumer and travel trends <input type="checkbox"/> Review your business and identify how your business meets consumer expectations through customer feedback <input type="checkbox"/> Understand who your existing customers are and their preferences, motivations and habits <input type="checkbox"/> Research the destination brand, hero experiences and destination
-------------	--

	tourism plan for your region so you can align and leverage the work of others
4. Market Identification	<ul style="list-style-type: none"> <input type="checkbox"/> Select your target markets <input type="checkbox"/> Research how your target markets behave and how to identify their needs

Figure 5: Marketing Plan steps included in learning element 1 (STE.MPS.MSG): Market Segmentation.

Therefore, the goal of this learning element is to deliver guidance and knowledge on how to successfully complete steps 3 and 4 of the marketing plan and/or the STP-process, related to Silver Tourism.

In this element, the student must show competencies regarding the following attributes:

- How does market segmentation fit in with marketing* – an explanation of the STP-process: (1) segmentation, (2) targeting, (3) positioning.
- Definition and benefits of market segmentation* – why does a marketer need to segment its potential market?
- Segmenting consumer markets* – a guide on how to segment general consumer markets
- Segmenting Silver Tourism markets* – best practices of market segmentation in the field of Silver Tourism.
- Segmenting organizational markets (B2B)* – a guide on how to segment organizational markets
- Target marketing* – an explanation of target marketing strategies.

Performance Criteria

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.MPS.MSG.PC1	<input type="checkbox"/> She/he knows the definition and benefits of market segmentation
STE.MPS.MSG.PC2	<input type="checkbox"/> She/he knows the steps of the STP-process and its relevance when creating a marketing plan
STE.MPS.MSG.PC3	<input type="checkbox"/> She/he knows the difference between behavioural, psychographic and profile segmentation and is able to segment the silver tourism market according to these categories
STE.MPS.MSG.PC4	<input type="checkbox"/> She/he knows how the current market of senior tourists is being segmented based on good practises and examples
STE.MPS.MSG.PC5	<input type="checkbox"/> She/he knows how to segment the organizational market segment in relation to marketing silver tourism products and services
STE.MPS.MSG.PC6	<input type="checkbox"/> She/he has basic knowledge of different targeting strategies

Table 11: Performance Criteria for the Element STE.MPS.MSG

Unit STE.MPS-Element 2: Positioning & Branding

Acronym: STE.MPS.POB

Element Title: Positioning & Branding.

Element principle:

Step three in the STP-process is positioning, which is the act of designing the company's offering so that it occupies a meaningful and distinct position in the target customer's mind. In order to position a product, service and/or destination, methods such as the positioning statement and competitor analysis are commonly used. Another important aspect in the positioning process is creating a company brand (brand development). Therefore, this element is an introduction to how to use these tools when developing a positioning strategy and a company brand, including practical examples related to Silver Tourism.

Element note:

The second learning element (STE.MPS.POB) is a continuation of the STP-process and focuses on the positioning of a product or service, the competitor analysis and brand design. This element is directly linked to *step 3. Research* and *step 4. Market identification* of the marketing plan as referred to in the Introduction Unit and covers the following topics:

3. Research	<ul style="list-style-type: none"> <input type="checkbox"/> Identify your competitors and how they market their products <input type="checkbox"/> Research the marketplace and identify consumer and travel trends <input type="checkbox"/> Review your business and identify how your business meets consumer expectations through customer feedback <input type="checkbox"/> Understand who your existing customers are and their preferences, motivations and habits <input type="checkbox"/> Research the destination brand, hero experiences and destination
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	tourism plan for your region so you can align and leverage the work of others
4. Market Identification	<ul style="list-style-type: none"> <input type="checkbox"/> Select your target market/s <input type="checkbox"/> Research how your target markets behave and how to identify their needs

Figure 6: Marketing Plan steps included in learning element 2 (STE.MPS.POB): Positioning & Branding

Therefore, the goal of this learning element is to deliver guidance and knowledge on how to successfully complete steps 3 and 4 of the marketing plan, related to Silver Tourism, by understanding different branding and positioning techniques.

In this element, the student must show competencies regarding the following attributes:

- *Positioning your company and products* – What is positioning and how to write a positioning statement?
- *Competitor analysis* – An explanation on the use of competitor analysis and an example of a direct use when developing Silver Tourism products.
- *The perceptual map* – a positioning tool for determining the position of a brand in the marketplace.
- *Brand development* – understanding the differences between products and brands.
- *Building brands* – naming the brand, the development of it and the positioning in the market.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.MPS.POB.PC1	<input type="checkbox"/> She/he knows the definition of positioning, its elements and how to draw up a positioning statement related to Silver Tourism.
STE.MPS.POB.PC2	<input type="checkbox"/> She/he knows how and when to use a competitor analysis, its importance within the positioning process and all the separate elements that make up a competitor analysis.
STE.MPS.POB.PC3	<input type="checkbox"/> She/he knows the definition and use of a perceptual map and is able to draw up one based on the competitor analysis.
STE.MPS.POB.PC4	<input type="checkbox"/> She/he knows the differences between a product and a brand.
STE.MPS.POB.PC5	<input type="checkbox"/> She/he knows the benefits of brands to organisations and consumers.
STE.MPS.POB.PC6	<input type="checkbox"/> She/he knows the essentials of building a brand which includes naming the brand, developing the brand and positioning the brand in the market.
STE.MPS.POB.PC7	<input type="checkbox"/> She/he has knowledge of existing Silver Tourism brands and how they were implemented.

Table 12: Performance Criteria for the Element STE.MPS.POB

Unit STE.MPS-Element 3: Marketing Tools

Acronym: STE.MPS.MKT

Element Title: Marketing Tools

Element principle:

Segmentation, targeting, positioning and branding (STE.MPS.SGM and STE.MPS.POB) is finally followed by marketing of the product, service and/or destination (STE.MPS.MKT and STE.MPS.CBP). In traditional terms successful marketing consists of the 4P's: Product, Price, Place and Promotion (nowadays there are many more P's). Within the advanced level of the Silver Tourism Expert profile, the focus of this element will be on the traditional distribution channels and methods used in marketing related to the Silver Tourism segment. Furthermore, methods and tools for reaching the selected target segment(s) through digital channels (e-marketing) and its importance will be highlighted. Lastly, the student will be introduced to several low-cost marketing solutions and tools that can help boost revenue and sales.

Element note:

Learning element 3 focuses on marketing tools. Traditionally this falls under the Marketing Mix (the original four P's: Product, Price, Place and Promotion). This element is directly linked to *step 5. The Marketing Mix* of the marketing plan as referred to in the Introduction Unit and covers the following topics:

5. Marketing Mix	<ul style="list-style-type: none"> <input type="checkbox"/> Product and services – how your product/service meets the needs and expectations of your target markets <input type="checkbox"/> Price – how you price your product to be both competitive and profitable <input type="checkbox"/> Place – how you distribute your product and services <input type="checkbox"/> Promotion – how you convey your messages to your customers
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Figure 7: Marketing Plan steps included in learning element 3 (STE.MPS.MKT): Marketing Tools

Therefore, the goal of this learning element is to deliver guidance and knowledge on how to successfully complete *step 5 Marketing Mix*, related to Silver Tourism (excluding price which is a part of STE.MPS.CBP) and to give the student the minimum knowledge to efficiently increase sales and revenue with their Silver Tourism products and/or services.

In this element, the student must show competencies regarding the following attributes:

- *Traditional marketing in Silver Tourism* – understanding of the traditional offline marketing methods and distribution models,
- *Tools for traditional marketing in Silver Tourism* – practical examples on offline marketing tools usable when addressing the Silver Tourism segment.
- *Digital marketing in Silver Tourism* – understanding of e-marketing methods.
- *Tools for digital marketing in Silver Tourism* - practical examples on e-marketing tools usable when addressing the Silver Tourism segment.
- *Low-cost marketing solutions and tools* - practical examples on low cost marketing tools and solutions usable when addressing the Silver Tourism segment.

Performance Criteria

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.MPS.MKT.PC1	<input type="checkbox"/> She/he knows what traditional marketing tools are, in specific offline marketing tools and their theoretical and practical use
STE.MPS.MKT.PC2	<input type="checkbox"/> She/he knows how to use several offline marketing tools when addressing the Silver Tourism market segment(s)

STE.MPS.MKT.PC3	<input type="checkbox"/> She/he knows what digital tools are, in specific e-marketing tools and their theoretical and practical use
STE.MPS.MKT.PC4	<input type="checkbox"/> She/he knows how to use several e-marketing tools when addressing the Silver Tourism market segment(s)
STE.MPS.MKT.PC5	<input type="checkbox"/> She/he knows has knowledge concerning low-cost marketing solutions and tools that can be used when increasing sales and revenue when addressing the Silver Tourism market segment(s)

Table 13: Performance Criteria for the Element STE.MPS.MKT

Unit STE.MPS-Element 4: Cost Benefit Analysis & Pricing.

Acronym: STE.MPS.CBP

Element Title: Cost Benefit Analysis & Pricing.

Element principle:

Segmentation, targeting, positioning and branding (STE.MPS.SGM and STE.MPS.POB) is finally followed by marketing of the product, service and/or destination (STE.MPS.MKT and STE.MPS.CBP). In traditional terms successful marketing consists of the 4P's: Product, Price, Place and Promotion (nowadays there are many more P's). Within the advanced level of the Silver Tourism Expert profile, the focus of this element will be on pricing of a Silver Tourism product and/or service and on Cost Benefit Analysis that will guarantee the product/service its success.

Element note:

A cost-benefit analysis (CBA) is a systematic process for calculating and comparing benefits and costs of a project or decision. A CBA helps predict whether the benefits of a project or decision outweigh its costs and by how much, relative to other alternatives. A CBA has two purposes:

1. To determine if the project or decision is a sound investment or decision (i.e., a justification of feasibility or advantage).
2. To provide a basis for comparing projects or decisions. It involves comparing the total expected cost of each option against the total expected benefits, to see whether the benefits outweigh the costs, and by how much.

The fourth learning element (STE.MPS.CBP) focuses on how to perform a Cost Benefit Analysis and how to do the pricing of your product and/or service in relation to marketing. Traditionally this falls under the Marketing Mix (the original four P's: Product, Price, Place and Promotion). This element is directly linked to *step 5*.

The *Marketing Mix* of the marketing plan as referred to in the Introduction Unit and covers the following topics:

5. Marketing Mix	<ul style="list-style-type: none"> <input type="checkbox"/> Product and services – how your product/services meet the needs and expectations of your target markets <input type="checkbox"/> Price – how you price your product to be both competitive and profitable <input type="checkbox"/> Place – how you distribute your product and services <input type="checkbox"/> Promotion – how you convey your messages to your customers
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Figure 8: Marketing Plan steps included in learning element 4 (STE.MPS.CBP): Cost Benefit Analysis & Pricing

Therefore, the goal of this learning element is to deliver guidance and knowledge on how to successfully complete *step 5 Marketing Mix*, related to Silver Tourism. In this element, the student must show competencies regarding the following attributes:

- *Pricing of a Silver Tourism product and/or Service* – how do you price your product to be both competitive and profitable?
- *Cost-Benefit Analysis* – Understanding a cost benefit analysis on a product or service.
- *Cost-Benefit Analysis product breakdown* – Practical example on how to perform a cost benefit analysis on a product or service.
- *Silver Tourism Product Breakdown* – cost-benefit analysis of existing Silver Tourism Products.

Performance Criteria

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.MPS.CBP.PC1	<input type="checkbox"/> She/he knows the relevant criteria when pricing a product and/or service in general and in relation to Silver Tourism in order to be both competitive and profitable.
STE.MPS.CBP.PC2	<input type="checkbox"/> She/he knows the definition of a cost-benefit analysis and why it is used in marketing.
STE.MPS.CBP.PC3	<input type="checkbox"/> She/he knows how a cost-benefit analysis for general products and/or services works based on a cost-benefit analysis breakdown of an existing product.
STE.MPS.CBP.PC4	<input type="checkbox"/> She/he knows how a cost-benefit analysis for Silver Tourism products and/or services works based on a cost-benefit analysis breakdown of an existing Silver Tourism product.

Table 14: Performance Criteria for the Element STE.MPS.CBP

Unit STE.MPS-Element 5: Marketing Effectiveness

Acronym: STE.MPS.MKE

Element Title: Marketing Effectiveness.

Element principle:

After the STP-process and the selection of marketing tools, product development, pricing and place of distribution, the marketing plan needs to be executed. This is usually done through an action plan which describes key strategies, actions to fulfil these, forms of result measurement (marketing effectiveness), timeframes and budget overviews. During the process of executing the action plan, the effectiveness needs to be monitored and reviewed in order to check whether you are not wasting resources on strategies that do not reach the target segment. According to many marketers, marketing effectiveness is quintessential to marketing. As marketing expert Tony Lennon (Ambler, 2004) once said: *'it's not marketing if it's not measured.'*

Element note:

The fifth learning element (STE.MPS.MKE) focuses on action plans and marketing effectiveness. This element is directly linked to *step 6. The Action Plan* and *step 7. Monitoring and Review* of the marketing plan as referred to in the Introduction Unit and covers the following topics:

6. Action Plan	<ul style="list-style-type: none"> <input type="checkbox"/> Describe your key strategies <input type="checkbox"/> List the actions you need to undertake to fulfil the strategies <input type="checkbox"/> Decide how you will measure your results and level of success <input type="checkbox"/> Set realistic timeframes for achieving your outcomes <input type="checkbox"/> Set a budget for each action so you can keep control of expenditure
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7. Monitoring and Review	<ul style="list-style-type: none"> <input type="checkbox"/> Evaluate activities, measures and results <input type="checkbox"/> Review and revise plans
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Figure 9: Marketing Plan steps included in learning element 5 (STE.MPS.MKE): Market Effectiveness.

Therefore, the goal of this learning element is to deliver guidance and knowledge on how to successfully complete step 6 and 7 of the marketing plan, related to Silver Tourism. In this element, the student must show competencies regarding the following attributes:

- *Marketing action plan* – understanding the elements of a marketing action plan and how to create one.
- *Monitoring marketing action plan* – theory on the importance of monitoring and reviewing marketing effectiveness.
- *Traditional marketing effectiveness tools* – practical examples and tools on how to monitor and review ‘offline’ traditional marketing effectiveness.
- *E-marketing effectiveness tools* – practical examples and tools on how to monitor and review E-marketing effectiveness.

Performance Criteria

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.MPS.MKE.PC1	<input type="checkbox"/> She/he understands the main elements that make up a marketing action plan and is able to create a plan.
STE.MPS.MKE.PC2	<input type="checkbox"/> She/he knows the theory of why monitoring and reviewing the marketing effectiveness of the action plan is of great

	importance when successfully marketing a product and/or service.
STE.MPS.MKE.PC3	<input type="checkbox"/> She/he knows how to use several 'offline' traditional marketing effectiveness tools when monitoring and reviewing the effectiveness of marketing a product and/or service.
STE.MPS.MKE.PC4	<input type="checkbox"/> She/he knows how to use several E-marketing effectiveness tools when monitoring and reviewing the effectiveness of marketing a product and/or service.

Table 15: Performance Criteria for the Element STE.MPS.MKE

Unit STE.DLR: Silver Tourism Expert – Developing local/regional Silver Tourism Destination

Acronym: STE.DLR

Title: Developing local/regional Silver Tourism Destination

Description:

Demographic change and ageing challenge the EU Member States and other Western industrial countries to find new ways of organising services and sustaining regions competitiveness. In 2020 around 20 % of Europeans will be over the age of 65 and in 2030 the figure will be even higher. The intensity and pace of demographic change varies between different countries and regions.

Even though changes in the age structure create new challenges in different areas of life and for the organization of services, ageing today is considered to have increasing opportunities in various sectors. Due to ageing, there is a need to develop new services and solutions that cater for the needs of the changing population structure and respond to the changes in consumer behavior and demand.

Being one of the fastest growing industries in Europe, the possibilities are vast in tourism as well. The tourism industry should prepare for the changes that occur in consumer needs and habits in order to maintain global competitiveness. Seniors are not a homogenous segment but a colourful group of individuals ranging from wealthy seniors to those with low income and from healthy seniors to persons who need special services. They all have their own interests and wishes.

The concept of local development is evolving rapidly. A subject of concern mainly for local authorities some years ago, local development now matters to a whole range of actors and to central governments. Governments are conscious that in a globalised economy, localities and regions compete on a world scale and must base their strategies on their local assets, knowledge, skills and other competitive advantages in order to succeed.

To promote their social and economic development in an effective and sustainable way, localities and regions must pursue strategies that are cross-cutting and comprehensive, involving all relevant actors. There is a clear role for government in facilitating the emergence and development of prosperity at local level.

Globalisation raises permanent challenges to countries in their efforts to support the development of a competitive and sustainable tourism sector. Policies and programmes that encourage domestic and international tourism trade suppress obstacles to tourism development and improve knowledge management, promote excellence and innovation. These programmes attract and keep talent, support the access of enterprises in the global market and use resources more efficiently and innovatively to develop competitive products in the world market.

Climate change, safety and security, demographic shifts, higher energy prices, uncompetitive tourism organisations, models and products have significant impacts on travel and tourism. The policy challenge is to ensure that tourism programmes encourage a long term sustainable and competitive tourism growth for the benefits of residents, visitors and businesses.

Destination development is a continuous process of coordination and development of amenities, facilities, products and services that support host communities to deliver quality experiences for visitors and enhance residents well-being. Managing destination development is fundamental to successful implementation of tourism management, where tourism experts and stakeholders put into action the priority strategies and plans developed.

The successful implementation of the destination development phase involves:

- Development is shaped by the planning scheme and approvals process of a destination which is a reflection of community aspirations for 'places'. Getting the right planning scheme is a giant leap towards encouraging sustainable tourism development;
- Development of an effective and collaborative destination management structure to facilitate stakeholder engagement and communication and guide development and management;

- Facilitation of a process to engage public and private sectors for investment in required tourism infrastructure and product, including:
 - Identification of public infrastructure services and facilities demands, including consideration of host community and visitor needs;
 - Planning for the development of appropriate public and private infrastructure and facilities to transport and distribute visitors to, and effectively throughout the destination;
 - Development of tourism-related products and experiences that are aligned with core brand values and the needs of the visitor market segments of the destination;
 - Development of tourism experiences within natural and protected areas, ensuring conservation values are maintained;
 - Provision of visitor information services to encourage increased expenditure and satisfaction;
- Facilitation of a process to engage public and private sectors for investment in required tourism infrastructure and product;
- Providing a forum to engage stakeholders in a proactive way to address key sector challenges for the destination, including:
 - Ensuring high standards for tourism products and facilities to enhance the visitor experience;
 - Developing a high quality labour market to deliver on visitor expectations and needs;
 - Developing a strategic approach to the management of risk, visitor health, safety and security.

In this unit, the Silver Tourism Expert will study how to involve relevant local or regional stakeholders and their role in development of silver tourism destination, how to implement a SWOT analysis in local or regional context and how to design a sustainable destination for silver tourists.

Not least, they will learn about networking and financial capacity building and methods of coaching the silver tourism service providers.

The "Silver Tourism Expert - Developing local/regional Silver Tourism Destination " skills unit consists of 5 learning elements: Stakeholders Involvement; Local/Regional context SWOT analysis; Sustainable destination design for Silver Tourism; Networking and financial capacity building; and Coaching/mentoring of the Silver Tourism service providers.

Unit STE.DLR-Element 1: Stakeholders Involvement

Acronym: STE.DLR.SHI

Element Title: Stakeholders Involvement.

Element Principle:

Stakeholders in tourism destination may refer to tourists (as the demand), industries (as the supplier) and hosts (the local community and environment). According to the World Tourism Organisation (WTO), stakeholders in sustainable tourism development are divided into three categories: the tourism industry, environmental support and the local community/government and all three stakeholder groups have their role in shaping sustainable tourism.

Thus, tourism industry's role is to create opportunities for business, employment, income and foreign currency exchange through the provision of tourism services (including transportation, accommodation, food and beverages). Meanwhile, the environment's role is to attract tourists to participate in activities based on local culture, nature, architecture (man-made). Finally, the local community/government (which includes residents and local businesses, organisations and associations) functions to make decisions.

In this respect, stakeholders can be used to developing silver tourism destination at local and regional level, so their involvement in this process is crucial.

Element note:

Though definitions of stakeholders may vary, in this first element students will learn that stakeholders are those that play a part in formation of silver tourism destination concept including tourists (as the demand), industries (private sector, non-profit sector and public sector as the supply) and hosts (comprising the local community and natural surroundings as the recipients of the effects). Issues addressed:

- Stakeholder mapping;

- Stakeholder groups and their role in developing silver tourism destination;
- Why is important to involve local and regional stakeholders in the process of developing silver tourism destination;
- Collaboration between various stakeholders;
- Stakeholder theory – useful instrument in order to achieve your objectives

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DLR.SHI.PC1	<input type="checkbox"/> She/he knows how to mapping local and regional relevant stakeholders
STE.DLR.SHI.PC2	<input type="checkbox"/> She/he knows the stakeholder groups and their role in developing silver tourism destination
STE.DLR.SHI.PC3	<input type="checkbox"/> She/he knows how to involve local and regional stakeholders in the process of developing silver tourism destination
STE.DLR.SHI.PC4	<input type="checkbox"/> She/he knows how to create a good collaboration between various stakeholders in order to maintain destination competitiveness
STE.DLR.SHI.PC5	<input type="checkbox"/> She/he knows how to use stakeholder theory in order to achieve the planned objectives, face constant uncertainty and minimise potential risks from the external environment

Table 16: Performance Criteria for the Element STE.DLR.S

Unit STE.DLR-Element 2: Local/Regional context SWOT analysis

Acronym: STE.DLR.LRC

Element Title: Local/Regional context SWOT analysis.

Element Principle:

A SWOT it's an analysis support to the choices and it answers the need for streamlining decision making. In general, European regulations requiring it for the evaluation of plans and programs.

It has a well-defined structure, its name deriving from the elements that compose: Strengths, Weaknesses, Opportunities and Threats.

Element note:

The SWOT analysis is use to identify the main strategic guidelines in relation to an overall objective of economic development or sectoral and, placed in time, can be applied **ex-ante phase** to improve the integration of a program or project in its context, **intermediate phase** determine, in relation to changes in context, if the lines of action identified are still relevant and provides a tool to decide changes to the program or **ex-post phase** serves to contextualize the results of the final plans and programs.

In the context of silver tourism, a SWOT analysis is required because one of the areas most relevant to the elderly is their leisure time, mainly their leisure time dedicated to tourism, which influences their physical, mental and social well-being. In fact, it is possible to increase one's life expectancy and counteract the aging process by helping the person stay active. Travelling can also help people avoid loneliness and lack of meaning in the later stages of life, which are some of the main problems that older people have today (Marín, García-González and Troyano, 2006). So, a SWOT analysis applied at local or regional context, it can determine whether a destination is attractive for a certain category of tourists, in our case senior tourists.

As the tourist profile of the senior is not clearly established and there are several discussions about their socio-demographic characteristics, it was assumed that they are over 55 years of age, usually retired with pensions or social benefits, and have leisure time to devote to travelling at any time of the year.

Therefore, an interesting effort is to try to analyze the variables that allow for an understanding of the causes of why an older person travels or not, together with his or her needs, preferences and desires, which are key elements to discern to respond to their needs and enable them to access tourism. Variables such as the sources of information used, type of accommodation, number of people travelling, trip preparation time, travel duration, means of transport used and type of trip help to describe the behavior of senior tourists, along with data on their motivations and socio-demographic characteristics.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DLR.LRC.PC1	<input type="checkbox"/> She/he knows what is a SWOT analysis, why and when it is use
STE.DLR.LRC.PC2	<input type="checkbox"/> She/he knows how to apply a SWOT analysis, in order to determine the strengths, weaknesses, opportunities and threats of a destination
STE.DLR.LRC.PC3	<input type="checkbox"/> She/he knows how to promote a destination, using the results of SWOT analysis, according to the behavior of senior tourists

Table 17: Performance Criteria for the Element STE.DLR.L

Unit STE.DLR-Element 3: Sustainable destination design for Silver Tourism

Acronym: STE.DLR.SDD

Element Title: Sustainable destination design for Silver Tourism.

Element Principle:

Without proper planning or management tourism can damage the destination's environment; cause social and cultural conflict and alienate the communities that host tourism. Sustainable tourism development manages the impacts of tourism on the destination's environment, economy and community and maintains and enhances the destination's resources for the present and future needs of both tourists and the communities that host them.

Element note:

In the context of sustainable tourism development, indicators are information sets which are formally selected for regular use to measure changes in assets and issues that are important for the tourism development and management of a given destination. WTO has been promoting the use of sustainable tourism indicators since the early 1990s, as essential instruments for policy-making, planning and management processes at destinations. The Guidebook on Indicators of Sustainable Development for Tourism Destinations, published in 2004, is the most comprehensive resource on this topic, the result of an extensive study on indicator initiatives worldwide.

The publication describes over 40 major sustainability issues, ranging from the management of natural resources (waste, water, energy, etc.), to development control, satisfaction of tourists and host communities, preservation of cultural heritage, seasonality, economic leakages, or climate change. For each issue, indicators and measurement techniques are suggested with practical information sources and examples. The publication also contains a procedure to develop destination-specific indicators, their use in tourism policy and planning processes, as well as applications in different destination types (e.g. coastal, urban, ecotourism, small communities).

Tourism destinations are constantly changing, they rise and fall in popularity and their success can often be influenced by changes in fashion or to external influences outside the control of the destination. This process can be understood in terms of a life cycle and this model postulates that tourism destinations tend to experience five distinct stages of growth: exploration, involvement, development, consolidation and stagnation outlined below:

- Exploration. During this stage small numbers of visitors are attracted by natural or cultural attractions; visitor numbers are limited and few tourist facilities exist; visitors may come from nearby towns.
- Involvement. During this stage there is limited involvement by local residents who provide some facilities for visitors; recognisable tourist seasons and market areas begin to emerge; visitors may travel from within the state or region.
- Development. During this stage large numbers of tourists arrive and external organisations such as hotel chains and tour operators take more of a key role; tourists may travel from all parts of the nation or internationally.
- Consolidation. During this stage tourism becomes a major part of the local economy and of increasing political importance, with politics perhaps taking more of a central role. Rates of visitor growth may have levelled off and some facilities may be in need of upgrading.
- Stagnation. During this stage the number of visitors has peaked; the destination may no longer be considered fashionable and there may be a high turnover of business properties.

Depending on the response of destination managers to the onset of stagnation, various scenarios are then possible, including decline, stabilisation, or rejuvenation and re-invention. It is at the stage of consolidation and stagnation that managers need to intervene and take action to avoid decline.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DLR.SDD.PC1	<input type="checkbox"/> She/he knows the indicators suggested by WTO in the Guidebook on Indicators of Sustainable Development for Tourism Destinations
STE.DLR.SDD.PC2	<input type="checkbox"/> She/he knows how to develop destination-specific indicators according to different types of destinations (coastal, urban, ecotourism, etc.)
STE.DLR.SDD.PC3	<input type="checkbox"/> She/he knows how to maintain the popularity of a sustainable destination
STE.DLR.SDD.PC4	<input type="checkbox"/> She/he knows the five stages of growth of a tourism destination
STE.DLR.SDD.PC5	<input type="checkbox"/> She/he knows what to do if a tourist destination reached the final stage - stagnation - to avoid decline and to reinvent itself

Table 18: Performance Criteria for the Element STE.DLR.SDD

Unit STE.DLR-Element 4: Networking and financial capacity building

Acronym: STE.DLR.NFC

Element Title: Networking and financial capacity building.

Element Principle:

Capacity building is essentially about change. Change that enables individuals, organisations, networks/sectors and broader social systems, to improve their competencies and capabilities to carry out functions, and more effectively manage the development processes over time. Capacity building is a 'strengths' or 'asset based' approach to development.

Element note:

The terms "capacity building" and "capacity development" are used in numerous contexts to describe a wide array of activities. In the most general terms, capacity consists of a party's ability to solve its problems and achieve its objectives. Capacity building aims to strengthen parties' ability to work together for their mutual benefit by providing them with the skills and tools they need to define problems and issues and formulate solutions.

Capacity building at the individual level or human resource development is only one component of a multi-dimensional, integrated approach that comes under the rubric of capacity building. Transferring skills to an individual will only be effective when those skills can be exercised. For this to occur there must be support from an employer and colleagues to practise these new skills and, they must be integrated into role profiles, operational procedures and policies within an organisation, institution and/or sector.

Tourism stakeholders invest in local/regional capacity-building as a way of contributing to long-term local/regional development. The international examples illustrate four broad types of investment; in staff training; in training for local entrepreneurs and tourism businesses; support for local schools and education; and awareness-raising among the local community for shared planning and consultation.

Financial capital is an important element of capacity building for tourism development, wealth creation and poverty reduction in general. Financial capital is defined as financial wealth that is used especially to start or maintain a business. Under financial capital can be distinguished the following three areas: financial investment, micro finance/credit and financial linkages/partnerships. All three are pre-requisites to sustainable tourism development. Financial capital is regarded as an integrated element of capacity building.

Enhancement of financial capital at all three areas-investments, micro-finance/credit and linkages/partnerships - will mobilize the local population and will contribute towards community participation, towards an integrated tourism development and ultimately towards poverty reduction through wealth creation.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DLR.NFC.PC1	<input type="checkbox"/> She/he knows about the term "capacity building"
STE.DLR.NFC.PC2	<input type="checkbox"/> She/he knows how to connect with relevant stakeholders
STE.DLR.NFC.PC3	<input type="checkbox"/> She/he knows how to develop a silver tourism destination reference to earnings of seniors tourists
STE.DLR.NFC.PC4	<input type="checkbox"/> She/he knows how to build a strategic partnerships

Table 19: Performance Criteria for the Element STE.DLR.NFC

Unit STE.DLR-Element 5: Coaching/mentoring of the Silver Tourism service providers

Acronym: STE.DLR.CME

Element Title: Coaching/mentoring of the Silver Tourism service providers.

Element Principle:

Over the past six decades, tourism has become one of the largest and fastest-growing economic sectors in the world. The industry has experienced continued expansion and diversification and due to its potential to contribute towards employment and economic growth, as well as to development in rural, peripheral or less-developed areas, tourism has become one of the most important economic sectors in most EU countries. However, the differences among the services provided by the subjects operating in the sector in EU countries are enormous. Tourism can be described as a cross-sector industry that includes a lot of diversified services provided by a wide range of actors.

Based on this, human resources and their level of education play an important and irreplaceable role in the development of the HLTT sector. This factor is becoming particularly important in terms of current unfavourable demographic development and the gradual aging of the population.

Element note:

Today's leaders and default silver tourism leaders are called upon to tackle increasingly complex issues in an ever-changing world. Success hinges on the ability to motivate and inspire a team, while ensuring the highest performance standards. In addition, knowledge and expertise is the currency individuals bring to the workplace. Organizations can struggle with sharing knowledge in a way that fosters connections, collaboration, and future-oriented outcomes.

With these types of challenges, there is a need a more personalized leadership development solution than classroom training, a book, or whitepaper. Coaching and mentoring programs can

help silver tourism organizations to develop effective leaders focused on performance and results.

“Mentoring relates primarily to the identification and nurturing of potential for the whole person. It can be a long-term relationship, where the goals may change but are always set by the learner. The learner owns both the goals and the process. Feedback comes from within the mentee – the mentor helps them to develop insight and understanding through intrinsic observation, that is, becoming more aware of their own experiences.’

‘Coaching relates primarily to performance improvement (often short-term) in a specific skills area. The goals, or at least the intermediate or sub-goals, are typically set with or at the suggestion of the coach. While the learner has primary ownership of the goal, the coach has primary ownership of the process. In most cases, coaching involves direct extrinsic feedback (i.e. the coach reports to the coachee what he or she has observed)” - Meggison and Clutterbuck, Techniques for Coaching and Mentoring.

Coaching

Coaching draws out the skills, resources, and creativity that already exist within people working in silver tourism to overcome your most difficult professional challenges. A coach is a trusted confidential resource that helps break down personal barriers to unleash leadership potential.

How? Whether the silver tourism people are aware of them or not, even the most talented and successful people have certain behaviours holding you back from becoming a more inspiring and effective leader. A coach helps them to think and communicate in new ways that lead to better results.

Taking into account their values and priorities, a coach invests time upfront, giving a thorough and personal assessment to identify specific needs and, with your input, designs a customized coaching experience around those areas. A coach helps them to outgrow problems and transform into the inspiring and effective leader as they can and want to be.

Why? Working with a coach who is focused on growth of the silver tourism people can:

- Improve self-confidence and self-awareness

- Improve interpersonal relationships
- Build better communication skills and emotional intelligence
- Create a better work-life fit
- Attract talent to an organization
- Improve employee satisfaction with leadership

Mentoring

Mentoring is a critical component in transferring knowledge between individuals and within organizations as well as developing relationships within a supportive organizational culture. At the core of mentoring is the ability to create awareness and understanding of others.

As mentoring – mutual learning and sharing of experience - has been acknowledged as one of the most powerful tools in career development, it seems to be the proper tool to address specific needs of a country's HLTT sector.

Mentoring programs are a critical component of any comprehensive leadership development program. Mentoring benefits organizations by supporting:

- New supervisors and emerging leaders
- Intern development programs
- The development of technical expertise
- Multi-generational collaboration and interaction
- The retention of institutional knowledge
- Relationship building across the organization
- A culture of service and stewardship

Management Concepts provides the full spectrum of support in the creation and management of mentoring programs for teams and organizations.

Differences between mentoring and coaching

Mentoring - Mentoring is an indefinite, relationship based activity with several specific but wide ranging goals. It does not have to be a formal process. The mentor is a facilitator who works with either an individual or a group of people over an extended time period. The agenda is open and continues to evolve over the longer term. Mentoring seeks to build wisdom – the ability to apply skills, knowledge and experience to new situations and processes.

Coaching -The focus is on meeting very specific objectives within a set period of time. Coaching is mainly concerned with performance and the development of certain skills. It usually takes place on a one-to-one basis and has a very specific purpose. There is usually a planned programme with a much shorter timeframe than in mentoring, so the learning goals are usually determined in advance.

Mentoring and coaching can be ‘stand alone’ activities, but they can also be used to complement each other.

Parallels between mentoring and coaching

Both mentoring and coaching take place independently of line managers – they are open, honest relationships between the mentor or coach and their protégé. A mentor or coach is an ‘accountability partner’ who works in their protégé’s best interests. He or she will bring a new approach to either a specific skill or an entire career.

Neither mentoring nor coaching is about teaching, instruction or telling somebody what to do. The role of mentors and coaches is to ask their protégé the right questions to promote greater self-awareness and more informed decision making. The role of mentors and coaches is not to solve problems, but to question how the best solutions might be found. The mentoring or coaching process evolves over time. The aims are not inflexible, but may change as the protégé reaches the set goals and learns new behaviour. The process continues until everybody is satisfied that the objectives have been achieved.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.DLR.CME.PC1	<input type="checkbox"/> She/he can identify training needs
STE.DLR.CME.PC2	<input type="checkbox"/> She/he can identify the best method of training for her/him
STE.DLR.CME.PC3	<input type="checkbox"/> She/he is able to identify and solve problems
STE.DLR.CME.PC4	<input type="checkbox"/> She/he is able to make decisions, implement changes and overcome obstacles
STE.DLR.CME.PC5	<input type="checkbox"/> She/he is able to plan for the future and take advantage of potential new opportunities

Table 20: Performance Criteria for the Element STE.DLR.CME

Unit STE.AIS: Silver Tourism Expert – Assurance and Improvement of Silver Tourism Services

Acronym: STE.AIS

Title: Assurance and Improvement of Silver Tourism Services.

Description:

Advanced level of Silver Tourism Expert profile should cover assurance and consulting skills based on transparent assessment methods and widely accepted standards of sustainable tourism. ISO/IEC 15504 Process Assessment standard and the Global Sustainable Tourism Council (GSTC) Criteria are selected as base for developing assurance and consulting skills for assessing and improving Silver Tourism Services. The guidelines and requirements of the ISO 31000 Risk Management and the ISO 91000 Quality Management standards are also embedded in line with the scope and context of providing sustainable Silver Tourism Services.

The (normative Part 2 of) ISO/IEC 15504 standard provides a framework for process assessment and sets out the minimum requirements for performing an assessment that ensure consistency and repeatability of the ratings. The requirements help to ensure that the assessment output is self-consistent and provides evidence to substantiate the ratings and to verify compliance with the requirements.

The requirements for process assessment defined by ISO/IEC 15504 form a structure which:

- a. facilitates self-assessment;
- b. provides a basis for use in process improvement and capability determination;
- c. takes into account the context in which the assessed process is implemented;
- d. produces a process rating;
- e. addresses the ability of the process to achieve its purpose;
- f. is applicable across all application domains and sizes of organization;

- g. may provide an objective benchmark between organizations.

Process assessment, as defined in this International Standard, is based on a two dimensional model containing a process dimension and a capability dimension. The process dimension is provided by applicable Process Reference Model(s), helping to determine a set of processes characterized by statements of process purpose and process outcomes. The capability dimension consists of a measurement framework comprising (up to six) process capability levels and their associated process attributes.

The assessment scope should include:

- 1) the processes to be investigated within the organizational unit;
- 2) the highest capability level to be investigated for each individual process within the assessment scope;
- 3) the organizational unit that deploys the processes;
- 4) the context which includes:
 - the size of the organizational unit;
 - the application domain of the products or services of the organizational unit;
 - key characteristics (e.g. size, criticality, complexity and quality) of the products or services of the organizational unit.

The assessment output consists of a set of process attribute ratings for each process assessed, termed the process profile, and may also include the capability level achieved by that process.

Process assessment is applicable in the following circumstances:

- a. by or on behalf of an organization with the objective of understanding the state of its own processes for process improvement;
- b. by or on behalf of an organization with the objective of determining the suitability of its own processes for a particular requirement or class of requirements;

- c. by or on behalf of one organization with the objective of determining the suitability of another organization's processes for a particular contract or class of contracts.

Above are excerpts from ISO/IEC 15504-2 Information Technology — Process assessment — Part 2: Performing an assessment © ISO/IEC 2003

This unit covers the skills necessary for application of ISO/IEC 15504 (SPICE) normative requirements in the Sustainable Tourism domain. The Silver Tourism Process Reference Model - based on the Global Sustainable Tourism Council (GSTC) Criteria and Performance Indicators - is referred for demonstration purpose as the process dimension of an applicable Silver Tourism Assessment Model.

The Global Sustainable Tourism Criteria are an effort to come to a common understanding of sustainable tourism, and are the minimum that any tourism business should aspire to reach. They are organized around four main themes: effective sustainability planning; maximizing social and economic benefits for the local community; enhancing cultural heritage; and reducing negative impacts to the environment. Although the criteria are initially intended for use by the accommodation and tour operation sectors, they have applicability to the entire tourism industry.

Some of the expected uses of the criteria include the following:

- Serve as basic guidelines for businesses of all sizes to become more sustainable, and help businesses choose sustainable tourism programs that fulfil these global criteria;
- Serve as guidance for travel agencies in choosing suppliers and sustainable tourism programs;
- Help consumers identify sound sustainable tourism programs and businesses;
- Serve as a common denominator for information media to recognize sustainable tourism providers;
- Help certification and other voluntary programs ensure that their standards meet a broadly accepted baseline;

- Offer governmental, non governmental, and private sector programs a starting point for developing sustainable tourism requirements; and
- Serve as basic guidelines for education and training bodies, such as hotel schools and universities.

Above are excerpts from the Preamble of the “Global Sustainable Tourism Criteria for Hotels and Tour Operators (version 2, 23 February 2012) combined with Suggested Performance Indicators (version 2.0, 10 December 2013)”. ©COPYRIGHT Global Sustainable Tourism Council. See <http://www.gstcouncil.org> for the current GSTC Criteria, relevant indicators and definitions of terms.

The Global Sustainable Tourism Criteria indicate what should be done, not how to do it or whether the goal has been achieved. Performance indicators, associated educational materials, and access to tools for implementation fulfil this role in the context and the specific scope of Silver Tourism.

Please note, that the Global Sustainable Tourism Council is revising the Global Sustainable Tourism Criteria for Hotels and Tour Operators version 2.0 (GSTC-HTO), which is due for a scheduled revision, and expanding the GSTC-HTO and to become the GSTC-Industry in 2016.

The “Silver Tourism Expert – Assurance and Improvement of Silver Tourism Services” skills unit consists of 5 learning elements: Adapting best practice models and performance indicators; Performance Measurement; Capability Assessment; Risk Management; and Quality Improvement.

Unit STE.AIS-Element 1: Adapting best practice models and performance indicators

Acronym:STE.AIS.ABP

Element Title: Adapting best practice models and performance indicators.

Element Principle:

Global Sustainable Tourism Council (GSTC) criteria are applicable to compose a Silver Tourism Reference Model in line with the process description requirements of the ISO/IEC 15504 standard. The process outcomes - necessary and sufficient to achieve the defined purpose (criteria) of the identified Silver Tourism processes - are defined based on the relevant performance indicators suggested by GSTC. For developing a specific process assessment model for Silver Tourism, the applicable best practices should be identified and mapped to the process outcomes. The selected sustainable tourism best practices should be adapted for the context and scope of Silver Tourism application area. This will enable transparent performance measurement by determining specific performance indicators in the form of “base practices” and “work products” (compliant to ISO/IEC 15504 process assessment).

Element Note:

The GSTC criteria address environmental, social, cultural, economic, quality, health and safety issues in both the sustainability management system and in the performance-based criteria. Legal compliance is required with all applicable local to international legislation and regulations (including, among others, health, safety, labour and environmental aspects). Some specific issues addressed are:

- Training of all personnel
- Measuring and addressing customer satisfaction
- Planning, design, construction, renovation, operation and demolition of buildings and infrastructure

- Land and water rights, and property acquisition are legal, comply with local communal and indigenous rights, including their free, prior and informed consent, and do not require involuntary resettlement
- Social and cultural interpretation and codes of conduct, particularly with respect to indigenous communities
- Labour rights of employees and equal opportunities for employment, training, and advancement of disadvantaged groups
- Access for all, including those with disabilities
- Opportunities for local small entrepreneurs to participate in the supply chain
- Protection of cultural heritage, including living cultures and their knowledge, customs, and traditional rights; as well as historical, sacred, and archaeological sites
- Protection of traditional livelihoods and access to sites of importance
- In environmental aspects, ensuring sustainable consumption, minimizing and properly treating solid and liquid wastes, reducing greenhouse gas and other emissions, and protecting biodiversity

The GSTC criteria oriented towards managing the actions that are under the control of a single enterprise within the following application areas (applicable for determining process categories):

- A. Demonstrate effective sustainable management.
- B. Maximize social and economic benefits to the local community and minimize negative impacts.
- C. Maximize benefits to cultural heritage and minimize negative impacts.
- D. Maximize benefits to the environment and minimize negative impacts.

Above are excerpts from the Global Sustainable Tourism Council (GSTC) Public Standard-Setting System Report (version 2.1, 11 December 2015, http://www.gstcouncil.org/files/GSTC_Standard-Setting_System_Report_v2_1_11-12-2015.pdf)

In this element the student must show competencies regarding the following attributes:

- *Criteria and performance indicators of sustainable tourism* – Global Sustainable Tourism Council Criteria and Suggested Performance Indicators.
- *Composing a Silver Tourism Process Reference Model*– Determining relevant process categories, identifying core processes and their purpose statements in line with the ISO/IEC 15504 requirements based on the applicable set of the Global Sustainable Tourism Council Criteria.
- *Determining Process Outcomes relevant for Silver Tourism* – Establishing applicable process outcomes sufficient and necessary for achieving the purposes of the selected processes based on the Performance Indicators suggested for the Global Sustainable Tourism Council Criteria within the scope of the processes identified for composing the Silver Tourism Reference Model.
- *Selecting and using Best Practices*– Applying ISO/IEC 15504 performance measurement concept for the GSTC performance indicators. Adapting sustainable tourism best practices for enabling and measuring the achievement of Silver Tourism process purposes and outcomes by developing ISO/IEC 15504 conform assessment indicators (“base practices” and “work products”).
- *Selecting and using Silver Tourism Base Practices*– Basics for determining a Silver Tourism Assessment Model for measuring performance of the selected Silver Tourism processes.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.AIS.ABP.PC1	<input type="checkbox"/> She/he knows the relevant criteria and performance indicators of sustainable tourism (Global Sustainable Tourism Council Criteria and Suggested Performance Indicators)
STE.AIS.ABP.PC2	<input type="checkbox"/> She/he knows how the relevant process categories and the purposes of the identical processes should be determined for composing a sample Silver Tourism Process Reference Model based on the Global Sustainable Tourism Council (GSTC) Criteria
STE.AIS.ABP.PC3	<input type="checkbox"/> She/he knows how the “process outcomes” should be established for measuring the achievement of a specific Silver Tourism process purpose based on the Performance Indicators suggested for the Global Sustainable Tourism Council (GSTC) Criteria
STE.AIS.ABP.PC4	<input type="checkbox"/> She/he knows how the best practices should be selected and used for supporting and measuring the achievement of the process outcomes referred by the sample Silver Tourism Process Reference Model based on the Global Sustainable Tourism Council (GSTC) Criteria
STE.AIS.ABP.PC5	<input type="checkbox"/> She/he knows the requirements for establishing the base for a Silver Tourism Process Assessment Model (selection of applicable processes with their specific process performance indicators)

Table 21: Performance Criteria for the Element STE.AIS.ABP

Free downloads:

<http://www.gstcouncil.org/en/gstc-criteria/sustainable-tourism-gstc-criteria.html>

Verifying conformity of the Silver Tourism Process Reference Model

Since a Process Reference Model may be the material produced by a community of interest, or Publicly Available Specification (like in this case of the Silver Tourism project), verification of the extent to which the Silver Tourism Process Reference Model meets the requirements may be through either demonstration of conformity or demonstration of compliance with the Global Sustainable Tourism Council (GSTC) Criteria.

Unit STE.AIS-Element 2: Performance Measurement

Acronym:STE.AIS.PME

Element Title: Performance Measurement.

Element Principle:

Sustainable tourism best practices are adaptable for enabling and measuring the achievement of Silver Tourism process purposes and outcomes by developing ISO/IEC 15504 conform assessment indicators (“base practices” and “work products”). Furthermore, ISO/IEC 15504-2 defines a measurement framework for the assessment of even higher process capability. Process capability is generally defined on a six-point ordinal scale that enables capability to be assessed from the bottom of the scale, Incomplete, through to the top end of the scale, Optimizing. The scale represents increasing capability of the implemented process, from not achieving the process purpose through to meeting current and projected business goals.

Element Note:

The measurement framework provides a schema for use in characterizing the capability of an implemented process with respect to the Silver Tourism Process Assessment Model (applying Silver Tourism Process Reference Model based on the Global Sustainable Tourism Council (GSTC) Criteria).

Higher levels of capability may give greater confidence that an organization’s business goals will be met; lower levels of capability may indicate potential sources of risk.

Within this measurement framework, the measure of capability is based upon a set of process attributes (PA). Each attribute defines a particular aspect of process capability. The extent of process attribute achievement is characterized on a defined rating scale. The combination of process attribute achievement and a defined grouping of process attributes together determine the process capability level.

Although PAs are defined in such a way that they can be rated independently of one another, this does not imply that there are no other relationships between them, e.g. the achievement of one attribute may be linked to the achievement of another attribute within the capability dimension.

In this element the student must show competencies regarding the following attributes:

- *Process attributes* – The measure of capability is based upon a set of process attributes (PA). Each attribute defines a particular aspect of process capability.
- *Process attribute rating* – The extent of process attribute achievement is measured using an ordinal scale.
- *Process Assessment Model indicators* – The defined set of assessment indicators shall be used to support the assessors’ judgement in rating process attributes in order to provide the basis for repeatability across assessments.
- *Process capability level* – The combination of process attribute achievement and a defined grouping of process attributes together determine the process capability level.

Excerpts from ISO/IEC 15504-2 Information Technology — Process assessment — Part 2: Performing an assessment © ISO/IEC 2003

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.AIS.PME.PC1	<input type="checkbox"/> She/he knows the six-point scale of ISO/IEC 15504 capability levels
STE.AIS.PME.PC2	<input type="checkbox"/> She/he knows the process attributes related to the capability levels

STE.AIS.PME.PC3	<input type="checkbox"/> She/he knows how to use the ordinal scale to measure the extent of process attribute achievement
STE.AIS.PME.PC4	<input type="checkbox"/> She/he knows the types and mapping of assessment indicators
STE.AIS.PME.PC5	<input type="checkbox"/> She/he knows how to determine the process capability level

Table 22: Performance Criteria for the Element STE.AIS.PME

ISO/IEC 15504-2 also sets out the requirements for an assessment or assessments conformant with this International Standard. These requirements help to ensure that the assessment output is self-consistent and provides evidence to substantiate the ratings.

Unit STE.AIS-Element 3: Capability Assessment

Acronym:STE.AIS.CAP

Element Title: Capability Assessment.

Element Principle:

The purpose of process assessment is to understand and improve the capability of the selected processes implemented by an organization. As a result of successful implementation of process assessment:

- a) information and data that characterize the processes assessed is determined;
- b) the extent to which the processes achieve the process purpose is determined.

Element Note:

ISO/IEC 15504-2 sets out the requirements for an assessment or assessments conformant with this International Standard. The requirements help to ensure that the assessment output is self-consistent and provides evidence to substantiate the ratings.

Process attribute ratings should be validated and recorded, ensuring that each rating record can be uniquely identified and traced to the process to which it relates. A rating is assigned for each process attribute and the set of process attribute ratings is provided as the process profile of the assessed Organizational Unit. Each process attribute is rated based on validated objective evidence gathered using assessment indicators provided by the Silver Tourism Process Assessment Model.

In deciding the rating for each attribute assessed, it is desirable to have the maximum agreement among the assessors. If the agreement is not unanimous then rules must be set for the decision making process (e.g. consensus, majority vote, etc.). The agreed rule should be recorded.

The process profile should be presented in form(s) that allow straightforward interpretation of their meaning and value. The requirements for constructing a Process Assessment Model

ensure that the indicators are traceable to the statements of process purpose and outcomes in the Process Reference Model and to the process attributes in ISO/IEC 15504-2.

Further traceability is required between attribute ratings and the objective evidence used. This is required in order to justify the assessor's judgements and provide the basis for repeatability. In other words, a third party verification or repetition of the rating, could trace all the evidence associated to an attribute rating and presumably would arrive at the same results. Furthermore, in order to facilitate this traceability and in order to provide confidence on the effective presence of an indicator, it is required that, for each attribute rated, the link between indicators and objective evidence be recorded.

In this element the student must show competencies regarding the following attributes:

- *Data collection and validation* - The data collected should accurately represent the processes assessed. Validation of this data should include assessing whether the sample size chosen is representative of the processes assessed.
- *Assessment context* – Judgement of process attribute rating should take into account the purpose and context of the assessment (process improvement or capability determination).
- *Documenting the findings* – Process attribute ratings in form of process profile; use of assessment indicators; decision making process; and relationship between indicators supporting attribute ratings and objective evidences should be recorded.
- *Mechanism for validation* – Adequacy, accuracy and consistency of the attribute rating process should be justified.

Above are excerpts from ISO/IEC 15504-3 Information Technology — Process assessment — Part 3: Guidance on performing an assessment © ISO/IEC 2004.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.AIS.CAP.PC1	<input type="checkbox"/> She/he knows how the rating scale and the assessment indicators are used in rating process attributes
STE.AIS.CAP.PC2	<input type="checkbox"/> She/he knows the ISO/IEC 15504-2 data validation requirements
STE.AIS.CAP.PC3	<input type="checkbox"/> She/he knows how to apply rating scale in contexts of process improvement and capability determination
STE.AIS.CAP.PC4	<input type="checkbox"/> She/he knows the requirements for documenting process attribute ratings
STE.AIS.CAP.PC5	<input type="checkbox"/> She/he knows aspects and means of validating process attribute ratings

Table 23: Performance Criteria for the Element STE.AIS.CAP

Process attribute rating (ISO/IEC 15504-2, 4.2.2 d)

A rating shall be assigned based on validated data for each process attribute.

- 1) the set of process attribute ratings shall be recorded as the process profile for the defined organizational unit;
- 2) during the assessment, the defined set of assessment indicators in the Process Assessment Model shall be used to support the assessor's judgement in rating process attributes in order to provide the basis for repeatability across assessments;

- 3) the decision-making process that is used to derive rating judgements shall be recorded;
- 4) traceability shall be maintained between an attribute rating and the objective evidence used in determining that rating;
- 5) for each process attribute rated, the relationship between the indicators and the objective evidence shall be recorded.

Excerpts from ISO/IEC 15504-2 Information Technology — Process assessment — Part 2: Performing an assessment © ISO/IEC 2003.

Unit STE.AIS-Element 4: Risk Management

Acronym:STE.AIS.RIM

Element Title: Risk Management.

Element Principle:

Process-related risk is assessed on a process-by-process basis, and inferred from the existence of gaps between a target process profile and an assessed process profile.

Element Note:

In this interpretation risk appetite is definitely not just a set of acceptable (practically hardly measureable and comparable) risk levels, but much more a strategic thinking about how the uncertainties around the business objectives and their effects on these objectives should be managed at all operational and organizational levels. Implementation of the processes should follow the related management decisions aligned with specific business conditions and stakeholders' expectations.

The ISO/IEC 15504 standard based process improvement and capability determination methodology provides a conceptual measurement framework for determining organizational risk appetite by setting target capability levels for key business and governance processes. Evaluation of the gaps between target and actually assessed capability profiles provides input for the next risk treatment planning and implementation cycle at the concerning operational or organizational level.

Overall risk associated with each process is then derived from the probability of a problem arising from an identified gap, and from its potential consequence, should it occur.

For each process, the assessor team:

- examines each process attribute within the target process profile, and designates any process attribute gaps;
- considers the process attribute gaps and designates any capability level gaps;

- identifies the potential process-related risk associated with each capability level gap;
- identifies which capability level gap constitutes the highest degree of risk, and takes this to represent the process-related risk for the process.

The assessor team then determines which process or processes represent the greatest degree of risk. If more than one process represents the same degree of risk, then the assessor team judges, with respect to nature of the specified requirements, which processes are most critical, and prioritizes them in order of overall risk.

In this element the student must show competencies regarding the following attributes:

- *Process attribute gaps* - Process attribute gaps occur whenever an assessed process attribute rating falls short of a required process attribute rating.
- *Probability of a problem occurring* - The probability of a problem occurring depends upon the extent of the process attribute gaps, and upon the capability levels where they occur.
- *Consequence* – The seriousness of the consequences depends on the capability level within which the gaps occur.
- *Process-related risk* – The process-related risk associated with each process depends upon the probability of problem arising from an identified gap, and upon the potential consequence, should it occur.

Excerpts from ISO/IEC 15504-4 Information Technology — Process assessment — Part 4: Guidance on use for process improvement and process capability determination © ISO/IEC 2004.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.AIS.RIM.PC1	<input type="checkbox"/> She/he knows the steps of assessing process-related risk
STE.AIS.RIM.PC2	<input type="checkbox"/> She/he knows how process attribute gaps can be designated
STE.AIS.RIM.PC3	<input type="checkbox"/> She/he knows how probability of a problem occurring can be designated
STE.AIS.RIM.PC4	<input type="checkbox"/> She/he knows how consequence of a problem occurring can be designated
STE.AIS.RIM.PC5	<input type="checkbox"/> She/he knows how process-related risk can be determined and interpreted for identifying quality deficiencies and/or improvement potentials

Table 24: Performance Criteria for the Element STE.AIS.RIM

If risks are identified at more capability levels, then the highest risk measure shall be considered as the process related risk. Based on the presented approach risk analysis shall determine which process or processes represent the greatest degree of risk.

While the gaps between target and assessed profiles indicate the effectiveness of process design, the process related risk measures the effectiveness of the operation, as shows the extent of risk that deviation from business objectives cannot be prevented or detected in time by the normal operation.

For effective Risk Management, according to **ISO 31000:2009 Risk Management** standard, the organization should at all operational and organizational levels comply with the following principles:

a) Risk Management creates and protects value.

Risk management contributes to the demonstrable achievement of enterprise objectives and improvement of business performance.

b) Risk Management is an integral part of all organizational processes.

Risk management is not separated from the main activities and business processes of the organization. Risk management is part of the responsibilities of management and an integral part of all business and governance processes at all operational and organizational levels.

c) Risk Management is part of decision making.

Risk management assists management make informed choices, prioritize actions and distinguish among alternative courses of action.

d) Risk Management explicitly addresses uncertainty.

Risk management explicitly takes account of uncertainty, the nature of that uncertainty, and how it can be addressed.

e) Risk Management is systematic, structured and timely.

A systematic, timely and structured approach to risk management contributes to efficiency and to consistent, comparable and reliable business results.

f) Risk Management is based on the best available information.

The inputs to the risk management process are based on information sources such as historical data, experience, stakeholder feedback, observation, forecasts and expert judgement. However, decision makers should take into account, any limitations of the data or modelling used or the possibility of divergence among experts.

g) Risk Management is tailored.

Risk management is aligned with the organization's external and internal business context and risk profile.

h) Risk Management takes human and cultural factors into account.

Risk management recognizes the capabilities, perceptions and intentions of external and internal people that can facilitate or hinder achievement of the organization's business objectives.

i) Risk Management is transparent and inclusive.

Appropriate and timely involvement of stakeholders and, in particular, decision makers at all operational and organizational levels, ensures that risk management remains relevant and up-to-date. Involvement also allows stakeholders to be properly represented and to have their views taken into account in determining risk criteria.

j) Risk Management is dynamic, iterative and responsive to change.

Risk management continually senses and responds to change. As external and internal events occur, business context and knowledge change, monitoring and review of risks take place, new risks emerge, some change, and others disappear.

k) Risk Management facilitates continual improvement of the organization.

Management should develop and implement strategies to improve the risk management capability aligned with all other (e.g. process) improvement aspects of the enterprise.

Unit STE.AIS-Element 5: Quality Improvement

Acronym:STE.AIS.QIM

Element Title: Quality Improvement.

Element Principle:

Achievement of quality objectives ensures customer satisfaction based on agreed levels of business operation.

Element Note:

This learning element deals with the following risk factors possibly resulting losses due to customer dissatisfaction:

- Requirements are not established adequately.
- Ineffective business relationship management.
- Product or service delivery default.

As applicable responses to the above risks, the Governance Model for Trusted Businesses provides definition and application practices of *Satisfactory Operation* process. The Satisfactory Operation process is a special application of the Enterprise SPICE model in the context of the Satisfaction governance objective. The application practices are implemented by using selected processes based on the Enterprise SPICE principles in the context of this special application:

- *Requirements (ESPICE)* - The organization apply practices to develop a detailed and precise set of requirements that meet customer needs and expectations and manage those requirements throughout the life cycle.
- *Business Relationship Management (ESPICE)* - The organization apply practices to establish and maintain a mutually satisfying relationship between the product or service supplier and the business partner based on understanding the business partner and its business drivers.

- *Operation and Support (ESPICE)* - The organization apply practices to operate the product or service at agreed service levels and support its users.

In this element the student must show competencies regarding the following attributes:

- Key risk and risk factors - concerning to the quality objectives of ensuring customer satisfaction based on agreed levels of business operation.
- Application practices ensuring that requirements are established and maintained based on customer needs and expectations.
- Application practices ensuring that business relationship management is effective.
- Application practices ensuring that Silver Tourism business operation supports its customers by achievement of agreed service level requirements. Monitoring based on agreed service levels.

Performance Criteria:

The student must be able to show evidence of competencies for the following performance criteria (PC):

Performance Criterion	Evidence Check: The student can demonstrate -
STE.AIS.QIM.PC1	<input type="checkbox"/> She/he knows which are the key risk and risk factors in relation to the quality objectives of ensuring customer satisfaction based on agreed levels of business operation.
STE.AIS.QIM.PC2	<input type="checkbox"/> She/he knows how to implement and evaluate application practices evidencing that requirements are established and maintained based on customer needs and expectations.

STE.AIS.QIM.PC3	<input type="checkbox"/> She/he knows how to implement and evaluate application practices evidencing that business relationship management is effective.
STE.AIS.QIM.PC4	<input type="checkbox"/> She/he knows how to implement and evaluate application practices evidencing that Silver Tourism business operation supports its customers by achievement of agreed service level requirements.

Table 25: Performance Criteria for the Element STE.AIS.QIM

Process ID	GOV.SOP
Process Name	Satisfactory Operation
Process Purpose	<p>The purpose of the Satisfactory Operation process is to ensure user/customer satisfaction based on agreed levels of business operation.</p> <p>NOTE: The Satisfactory Operation process is a special application of the Enterprise SPICE model in the context of the “Satisfaction” governance objective. Thus this process is denoted an “Application Area”. The practices, called “application practices”, are implemented using selected processes based on the Enterprise SPICE model in the context of this special application. This facilitates the re-use of the model without recreating processes that are already well established.</p>
Process Outcomes	<p>As a result of successful implementation of the Satisfactory Operation process:</p> <p>1) Requirements are established and maintained based on user/customer needs and expectations.</p>

	<p>2) Business relationship management is effective.</p> <p>3) Business operation supports its user entities by achievement of agreed service level requirements.</p>
<p>Application practices</p>	<p>BP1 Establish and maintain requirements that meet customer needs and expectations. The organization applies practices to develop a detailed and precise set of requirements that meet user/customer needs and expectations and manage those requirements throughout the life cycle. [Outcome: 1]</p> <p>NOTE1: This practice is implemented by performing practices of the Enterprise SPICE Requirements process with a specific focus on business sustainability:</p> <p>LFC.2.BP1: Identify Requirements. Identify all types of requirements applicable to customer needs and expectations.</p> <p>LFC.2.BP2: Derive Requirements. Derive requirements that may be identified as necessary implications of the identified requirements.</p> <p>LFC.2.BP3: Analyze Requirements. Analyze requirements to ensure that they satisfy established quality criteria, including unambiguity, completeness, traceability, feasibility, and verifiability.</p> <p>LFC.2.BP4: Baseline Requirements. Record, approve, baseline, and place under change control all requirements.</p> <p>LFC.2.BP5: Analyze Requirements Risks. Document and analyze risks associated with the requirements.</p> <p>LFC.2.BP6: Manage Requirements Changes. Analyze all requirements change requests for impact on the product or service and, upon approval, incorporate the approved changes</p>

into the requirements baseline.

LFC.2.BP7: Ensure and Maintain Requirements Traceability across the Life Cycle. Maintain traceability among requirements and between requirements and plans, work products, and activities initiating corrective action if inconsistencies are identified.

BP2 Manage relationship among business stakeholders. The organization applies practices to establish and maintain a mutually satisfying relationship between the product or service supplier and the business partner based on understanding the business partner and its business drivers. [Outcome: 2]

NOTE2: This practice is implemented by performing practices of the Enterprise SPICE Business Relationship Management process with a specific focus on business sustainability:

GVM.5.BP1: Develop Relationships. Develop and document contacts and relationships with the business, customers and stakeholders.

GVM.5BP2: Establish Interactive Communication Methodologies and Structures with Stakeholders and Partners. Name an individual or individuals who are responsible for collaboratively managing customer satisfaction and the whole Business Relationship Management process.

GVM.5BP3: Identify Relationship Attributes. Identify and manage cultural, market, loyalty and beneficiaries attributes.

GVM.5.BP4: Identify Value Creation Opportunities. Proactively identify value creation opportunities and communicate them to the customer.

GVM.5.BP5: Manage Complaints and Compliments. Log and

manage all complaints and compliments by analyzing existing information, obtaining feedback from customers and performing service reviews.

GVM.5.BP6: Create Service Level Agreements. Create Service Level Agreements between the business owner and the product/service supplier.

GVM.5.BP7: Establish a Service Catalog. Establish and maintain a service catalog for communicating with the business.

BP3 Operate according to agreed service levels. The organization applies practices to operate the product or service at agreed service levels and support its users/customers. [Outcome: 3]

NOTE3: This practice is implemented by performing practices of the Enterprise SPICE Operation and Support process with a specific focus on business sustainability:

LFC.8.BP1: Operate the Product or Service. Operate the product or service in its intended environment according to agreed service levels.

LFC.8.BP2: Establish Methods. Establish methods for monitoring and sustaining required product or service levels.

LFC.8.BP3: Monitor and Evaluate Capacity, Service, and Performance. Monitor and evaluate capacity, service, and performance of the product or service.

LFC.8.BP4: Confirm Availability of Resources. Confirm availability of required resources (e.g., personnel, parts) to ensure service levels can be sustained.

LFC.8.BP5: Perform Corrective and/or Preventive Maintenance. Perform corrective and/or preventive maintenance by replacing or servicing product or service elements prior to

	<p>failure.</p> <p>LFC.8.BP6: Analyze Failures. Perform failure identification and analysis activities when problems or interruptions occur in the product or delivered service.</p> <p>LFC.8.BP7: Take or Initiate Corrective Action. Take corrective action when appropriate (e.g., defective part, human error), or initiate corrective action for product or service modification.</p> <p>LFC.8.BP8: Provide Customer Support. Answer customer and user questions and help resolve problems they encounter.</p>
<p>Relationship Notes</p>	<p>The relationships between the Satisfactory Operation process and application practices, and other processes in Enterprise SPICE model, have been noted for each practice above. This innovative concept of including “Application Areas” in a process assessment model instantiates the idea of using already established processes with respect to a particular application.</p>
<p>Sources</p>	<p>Enterprise SPICE: LFC.2 Requirements, GVM.5 Business Relationship Management, LFC.8 Operation and Support.</p>
<p>References</p>	<p>Enterprise SPICE® - An Integrated Model for Enterprise-wide Assessment and Improvement.</p> <p>Technical Report – Issue 1 September 2010</p> <p>Copyright © The SPICE User Group 2010.</p>

Table 26: The Satisfactory Operation Process Description

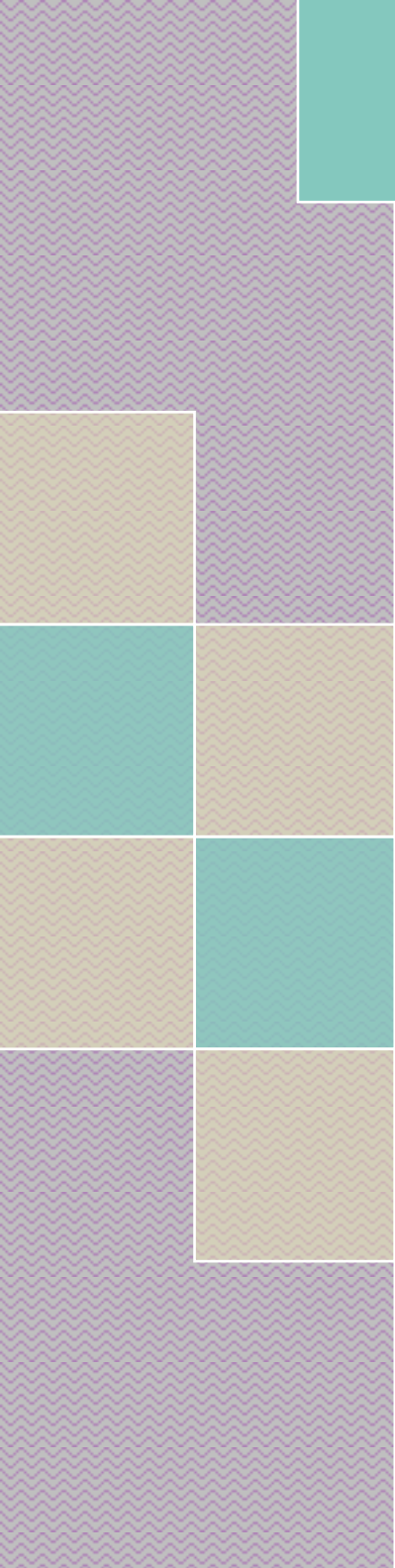
Note1: Above base practices referred by the Enterprise SPICE model are applicable for assessing governance effectiveness related to the sustainability objectives of the business operation. However they should be considered as a starting point for judgment whether, given the application context, they are contributing to the intended purpose of the process, not as a compulsory check-list of what every organization must have.

Note2: The Enterprise SPICE model does not contain the capability dimension of the Process Assessment Model beyond capability level 1. As not targeting higher process capability levels during this special application, this material does not include the list of specific work products as referred by the process performance indicators of the Enterprise SPICE processes. Therefore the judgment of governance effectiveness related to the sustainability objectives of the business operation is based on assessment of organization' governance practices by considering the listed base practices.



Professional Profile of the Silver Tourism Expert

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