

Pre-study Áfangastaðastofur

Pre-study & guidance on establishing Destination Management Organizations
June 2019

Design Nation

Stjórnstöð ferðamála

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Background & Description

This is a pre-study and guide on establishing regional Áfangastaðastofur, or DMOs – Destination Management Organizations, in Iceland.

The study is made as a next step in connection to the national program of preparing regional Áfangastaðaáætlanir, Destination Management Plans (DMPs), in Iceland.

The purpose of the pre-study is to provide useful tools and insights, and propose the next steps to be taken when establishing regional Áfangastaðastofur, DMOs, in Iceland.

Purpose of pre-study

The purpose of the pre-study is to provide useful tools, insights and knowledge in order to guide and propose the next steps to be taken when establishing of a national network of professional regional Áfangastaðastofur, DMOs, in Iceland.

Objectives of pre-study

The following objectives was set for the pre-study:

1. *Included in section 1 of this report:*
Identify up-to-date examples of DMOs from other destinations internationally, and explain the basic structure and models. This should also include looking into funding models, challenges, frameworks, collaboration, and how they have been able to be successful in their development.
2. *Included in section 2 of this report:*
Produce a proposal on next step for establishing regional DMOs in Iceland. The aim is to identify an Icelandic model for how to do it, and to build a structure from Icelandic contexts allowing the regions to work efficiently with Destination Management in connection to regional and national strategies.

The result from the pre-study will be a proposal on how to do it, looking into the steps on how to establish a DMO in a successful way, and at the same time consider the differences between the regions. Besides thoughts about on the compositions of the DMOs, focus will be on the function, operation and expectations of the DMOs.

Description

The pre-study provides summarized insights from the knowledge that has been obtained after contact with 11 Destination Organizations. The examples included in the study are in general to be considered as Destination Management Organizations - DMOs. All of the contacted DMOs have experience of working within Destination Management.

The DMOs that are covered in this study are Alpine Pearls - an umbrella of 23 destinations in Germany, Austria, Slovenia, Italy and Switzerland. Destination British Columbia, Visit County Durham, Destination Great Lake Taupō, the project Visitor Management in Nordland Fylke, Visit Svalbard, Visit Aberdeenshire, Outer Hebrides Tourism, Scottish Tourism Alliance, Visit Scotland and finally Swedish Lapland Visitors Board.

The Destination Organizations have been interviewed and analyzed, and the information has then been compared and reflected upon to discover similarities and patterns.

The variety of the examples has provided a deep understanding of the practical challenges that accompany the development cycles, perspectives from different levels and relationships between stakeholders. It has also given insights into the organizations' different situations, from small to big scale, and from local to national.

The study of international examples of Destination Management has strengthened and motivated the path that the Icelandic Tourist Board (Ferðamálastofa) and Icelandic Tourism Task Force (Stjórnstöð Ferðamála) are focusing on. The goal is to have Destination Management Organizations, Áfangastaðastofur, all around Iceland.

The result of the pre-study is a proposal for the next step to establish Áfangastaðastofur, in Iceland. The proposal is built upon Icelandic conditions concerning regional differences and administrative systems.

The first section of this report - "International examples of Destination Management" - is public, while the second part - "Establishment of Áfangastaðastofur" - is not allowed to distribute without permission from Ferðamálastofa.

Introduction

DMO – Destination Management Organization

The abbreviation DMO is traditionally being referred to as a Destination Marketing Organization. However, since the responsibilities extend far beyond the traditional role of promotion, sales and advertising, a Destination Management Organization that fully embraces the role is more up to date.

Sometimes DMMO is being used meaning Destination Management and Marketing Organization. Also RTO – Regional Tourism Organization occurs, and RDMO – Regional Marketing/Management Organization. Maybe it could be enough to simply use Destination Organization which is also common, or Destination Office that is the direct translation of Áfangastaðastofa. The focus of this study is on Destination Management, and will mainly use DMO as an abbreviation for Destination Management Organization.

DMOs today should not only lead on Destination Marketing, but must also be strategic leaders in Destination Development. This role requires them to drive and coordinate Destination Management activities within the framework of a coherent strategy.

When preparing a Destination Management Plan (DMP), preferably a Destination Management Organization (DMO) should be responsible for leading the process.

Why a DMO?

When the DMP program was initiated in Iceland it stood clear that the process would result in extensive amounts of regional development needs. This is of course a huge opportunity to be working around the tourism as a whole, but it is also a major challenge. To carry out a DMP is not an easy task, but it requires persistency and involvement from many stakeholders on many levels.

The DMP-program has staked out what is needed to develop and to manage. Now it is time to focus on the next steps - how to do it and how to get further. The regional Destination Management Organization (DMO) has a key role in that process.

A DMO helps us to orchestrate and manage our destination, based on understanding of existing challenges and opportunities. The DMO is leading in the development of tourism in the area, and is continuously setting new goals and objectives.

The concept of a DMO ensures further development with a long-term and sustainable approach in connection to local, regional and national perspectives. The progress and the development of the destination is based on professional management, that includes measuring and evaluating of efforts; focusing on strategic and desired results for the destination.

Case Study Destination Management

Section 1: Research on international examples of Destination Management
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1.1. International examples of Destination Management

The international examples of Destination Management included in this pre-study are relevant for Icelandic conditions in different ways. The examples studied have been selected by considering such parameters as characteristics of destination, types of tourism, regional context, organizational framework and relation to Destination Management.

The examples included vary largely in size, both organization wise and geographically. Furthermore, there are structural differences between them, and they operate in different contexts; ranging from local, to regional and national. However, there are a lot of similarities when it comes to their approach. The focus on Destination Management has increased significantly over the last decade, which in several of the examples has led to transformational changes on organizational levels.

This study presents the essence, and some conclusions, from the dialogue with the Destination Organizations. All of the examples have brought us useful insights and learnings to

be used in our further efforts to establish and improve the Destination Management in Iceland. We want to express our gratitude towards the participating Destination Organizations and people who have shared their time and knowledge with us.

Method

All of the Destination Organizations included in the study have been contacted, and asked to contribute. In most cases the Destination Organizations have been interviewed. A couple of the Destination Organizations have answered the set of interview questions in text and then returned the answers.

All of the interviews have been transcribed. The full texts are available as an appendix within the closest working group of this pre-study. The same goes for the extensive amount of material that the studied Destination Organizations generously have shared, as strategic layouts, corporate strategies, marketing plans and more.



Picture: Destinations studied in this pre-study

Destination Organizations in this study

The following Destination Organizations have contributed to the study.

Alp region (Germany, Austria, Slovenia, Italy and Switzerland): Alpine Pearls

Contact: Karmen Mentil - Director

Web: www.alpine-pearls.com

Canada: Destination British Columbia

Contact: Grant Mackay - Vice President Destination Management

Corporate web: www.destinationbc.ca

Commercial web: www.hellobc.com

England: Visit County Durham

Contact: Michelle Gorman - Managing Director

Web: www.visitcountydurham.org

New Zealand: Destination Great Lake Taupō

Contact: Ray Salter - Chairman

Web: www.lovetaupo.com

Norway: Nordland Fylke – Visitor Management

Contact: Ann Heidi Hansen - Project Manager Visitor Management

Web: www.nfk.no

Norway: Visit Svalbard

Contact: Ronny Brunvoll - former General Manager

Web: www.visitsvalbard.com

Scotland: Visit Aberdeenshire

Contact: Chris Foy - Chief Executive

Corporate web: industry.visitabdn.com

Commercial web: www.visitabdn.com

Scotland: Outer Hebrides Tourism

Contact: Rob McKinnon - Chief Executive

Corporate web: www.outerhebridestourism.org

Commercial web: www.visitouterhebrides.co.uk

Scotland: Scottish Tourism Alliance

Contact: Marc Crothall - CEO

Web: www.scottishtourismalliance.co.uk

Scotland: Visit Scotland

Contact: Riddell Graham - Director of Industry & Destination Development

Corporate web: www.visitscotland.org

Commercial web: www.visitscotland.com

Sweden: Swedish Lapland Visitors Board

Contact: Camilla Bondareva - Destination Development Strategist

Corporate web: www.swedishlaplandvisitorsboard.com

Commercial web: www.swedishlapland.com

Basic Facts of the studied Destination Organizations

	Destination Organization	Specification	Areal and Population
Alp Region	Alpine Pearls (Umbrella Organization/ Collaboration between DMOs)	Alpine Pearls is an umbrella organization of 23 destinations in the Alps of Germany, Austria, Slovenia, Italy and Switzerland.	-
Canada	Destination British Columbia (Provincial Destination Organization / Industry-led Crown corporation)	Destination BC is the official DMO for the region of British Columbia. British Columbia is divided into six tourism regions. Five are managed by Regional Destination Marketing Organizations in partnership with Destination BC; one is managed by Destination BC directly. There are 200 communities throughout the province.	944 735 km ² 4,992 million
England	Visit County Durham (VCD) (Regional Destination Organization)	VCD is the official DMO for County Durham which works on behalf of businesses and public agencies to support the growth and development of the county's visitor economy. County Durham consists of Durham City, Durham coast, the countryside Durham Dales and the Vale of Durham.	2 721 km ² 862 600
New Zealand	Destination Great Lake Taupō (DGLT) (Regional Destination Organization)	DGLT is the is the Regional Tourism Organization for the Great Lake Taupō region. It is a medium sized region in the centre of the North Island of New Zealand. The region surrounds New Zealand's largest lake.	6 970 km ² 37 200
Norway	Nordland Fylke – Visitor Management (Public Regional Agency)	Visitor Management in Nordland Fylke is a pilot project in Nordland Fylke, focusing on Sustainable Communities where tourism has a positive role to play. Nordland is a county in northern Norway consisting of the five districts Helgeland, Salten, Ofoten, Lofoten and Vesterålen.	38 462 km ² 245 000
Norway	Visit Svalbard (Regional Destination Organization)	Visit Svalbard is the official DMO for Svalbard and Longyearbyen. The Svalbard Islands are located in the Arctic Ocean, halfway between Norway and the North Pole. Svalbard is a certified Sustainable Destination, a seal of approval given to destinations that work systematically to reduce the negative impact of tourism. The label Sustainable Destination (Bærekraftig reisemål) is a national labelling scheme for travel destinations - https://www.visitnorway.com/plan-your-trip/green-travel/sustainable-destinations/#sustainable .	61 000 km ² 2 700-3 000
Scotland	Visit Aberdeenshire (Regional Destination Organization)	VisitAberdeenshire is the official DMO for the city of Aberdeen and surrounding countryside and coast of Aberdeenshire. Aberdeenshire is Located on the north-east coast of Scotland.	6 370 km ² 490 000
Scotland	Outer Hebrides Tourism (OHT) (Regional Destination Organization)	OHT is the official DMO for Outer Hebrides consisting of 3 island groups located in the north-west of Scotland.	3 071 km ² 30 000
Scotland	Scottish Tourism Alliance (STA) (National Tourism Industry Member Organization)	The STA is the largest member organization for tourism businesses in Scotland and the leading representative body for its tourism industry. The STA also leads the facilitation, coordination, ongoing development and delivery of the National Tourism Strategy.	78 772 km ² 5,425 million
Scotland	Visit Scotland (National Tourism Organization)	VisitScotland is the national tourism agency for Scotland. It is an executive non-departmental public body of the Scottish Government. VisitScotland's primary aim is to market Scotland as a tourism destination. The organization also seeks to work with the tourism industry in Scotland to maintain standards in visitor attractions and accommodation provision. VisitScotland works closely with the STA to contribute to the delivery of the National Tourism Strategy.	78 772 km ² 5,425 million
Sweden	Swedish Lapland Visitors Board (Regional Destination Organization)	Swedish Lapland Visitors Board is the official representative for the hospitality industry of Swedish Lapland. Swedish Lapland consists of 16 local destinations.	117 000 km ² 286 400

Analysis of Destination Organizations

The following analysis is a summary of the answers collected from the Destination Organizations.

ALPINE PEARLS (Germany, Austria, Slovenia, Italy and Switzerland)

Organization	<p>Alpine Pearls is an umbrella organization for currently 23 destinations in the Alps with a focus on soft mobility. Soft mobility is explained as sustainable, climate-friendly and easy on the environment while moving about in the outdoors.</p> <p>Alpine Pearls is responsible for representing the members to the public (external marketing) and supporting them with developing soft mobile and transnational products (internal networking).</p> <p>Alpine pearls was founded in 2006.</p> <p>The destinations are independently working on their destination management, but in cooperation with the Alpine Pearls, they focus on soft mobility, so enabling people to travel to the destination without a car and be mobile during their holiday without a car.</p>
Staff and board	<p>The organization has one chairman, who is the mayor of Werfenweng who also is the founder of the organization. Furthermore, there is one deputy chairman and the treasurer.</p> <p>The board is made out of one person per country (Austria, Germany, Switzerland, Slovenia, Italy: exemption with 2 representatives). They are elected for 3 years at the yearly general meeting.</p> <p>The central decisions, like budgeting and planning, are made at the yearly general meeting, where representatives of all pearls participate.</p> <p>The organization is managed by an external manager from a consultancy organization, supported by fix staff and other external service agencies (e.g for web-marketing, translations, etc).</p>
Physical location	<p>There is one office, located in Werfenweng, as this is the founding member of the Alpine Pearls and it is convenient to be located in the same destination as the chairman.</p>
Financing	<p>The organization is financed through yearly membership fees. Smaller destinations pay less (Euro 8 000) than the bigger ones (Euro 12 000). Further funding is provided to the organization through participation in a variety of EU-projects.</p> <p>The distribution of funding and finances is decided by the general assembly and mostly invested in marketing projects.</p>
Plan and strategy	<p>Alpine Pearls has a vision and criteria catalogue. It is typically discussed briefly at the yearly meeting but not changed and adapted yearly. The last change was in October 2014.</p> <p>The plans of Alpine Pearls are focused on five main aspects:</p> <ul style="list-style-type: none"> • Climate friendly mobility • Source of Energy and Energy efficiency • Biodiversity • "Feel good quality" • Regional Economy: regional products <p>Besides the long-term strategic plan (criteria) Alpine Pearls also produces a yearly action plan. The management team is responsible to realize the yearly action plan. The results are presented at the annual general assembly.</p>
Focus	<p>The focus of Alpine Pearls is mainly on marketing, aiming to increase the number of visitors arriving with public transportation in the destinations and encourage them to only use soft mobility options. This also includes product development, innovation, education.</p>
KPIs	<p>Alpine Pearls regularly asks member destinations to provide new information on number of arrivals, and number of arrivals using public transportation.</p>
Stakeholders involvement	<p>The main stakeholders are the local DMOs and public administrations within the destinations. Alpine Pearls also cooperates with car-sharing companies and train companies. They also cooperate with ministries and national tourist offices, etc.</p> <p>Alpine Pearls communicate regularly through an internal newsletter about facts and news. They provide information about new developments through projects, and invite professionals for the yearly assembly to give everyone renewed motivation.</p> <p>Alpine Pearls also provide direct feedback and suggestions on how to improve with a yearly criteria check.</p> <p>Alpine Pearls invite the member destinations to visit each other to learn from each other (co-operative self-assessment), which is favored by the members.</p> <p>The destinations are always interested in being involved in marketing projects where they can get active (e.g. for online campaigns, or for media trips, for blogger stories, etc).</p>

DESTINATION BRITISH COLUMBIA

Organization	<p>Destination BC (DBC) is a statutory Crown corporation. The organization is created by legislation. A new legislation was passed in 2013, that created the existing organization.</p> <p>DBC has two core divisions. One of the divisions is called Destination Management. The other operating unit is called Global Marketing. It is the combination of those two operating units, that encompass Destination Management.</p>
Staff and board	<p>There are three operating units and three VPs in the organization. The units are Destination Management, Global Marketing and Corporate Development.</p> <p>The number of staff is 108 whereof 23 is working in the Destination Management unit, 57 in Global Marketing and 25 in Corporate Development.</p> <p>Destination Management is broken into two business units. The Visitor Service & Industry Partnership unit, and the Destination & Industry Development. The latter fills an identified gap focusing on the development of a framework for long-term Destination Development Planning, and started about three years ago.</p> <p>The board is composed of up to nine private-sector directors, who are appointed by the minister responsible for tourism. A minority (4 of 9 Directors) may have current involvement or investments in the tourism and/or hospitality sector. The majority (5 of 9 Directors) may not.</p>
Physical location	<p>The corporate office of DBC is situated in Vancouver. There are also people working remotely in Victoria, and representation around the world; trade and marketing people in the UK or Germany, Japan, China, Australia, Mexico.</p> <p>British Columbia is divided into six tourism regions. Five are managed by Regional Destination Marketing Organizations in partnership with DBC; one is managed by DBC directly. DBC has longstanding service contracts with the five Regional DMOs. The Regional DMOs are independent non-profit societies and they have their own boards.</p>
Financing	<p>DBC is funded from voter appropriations from the government. Voter appropriations can go up and down, but they are an agreement on a minimum level that can be increased through some performance based funding.</p> <p>There are industry performance targets that have to be met, as well as corporate targets.</p> <p>DBC provides contributing funding to the Regional DMOs. The primary income stream of the Regional DMOs comes from their contracts with DBC, and they then support the services that DBC needs on the ground. The Regional DMOs are almost considered as the field force of DBC.</p> <p>There is also a system for collecting an additional hotel tax – MRDT (Municipal & Regional District Tax Program) that was not around five years ago. So, there has been a massive change in terms of where the money is and how that money is being used. DBC is working on that at the moment.</p>
Plan and strategy	<p>DBC is working on both long terms and short terms plans and strategies. Among the documents being prepared the following can be mentioned:</p> <ul style="list-style-type: none"> • Destination BC Corporate Strategy – Is being made as 3 years strategies. • Destination BC Global Marketing Plan – is being made annually. • Destination BC Destination Management Strategy and Plan – is being made as 3 years strategies + annual operating plans and action plans for each year. • Destination BC Annual Report • Business unit Operating Plans <p>The Regional DMOs write Annual Operating Plans that show how they are supporting the efforts of DBC, and how they are using their budgets. They are also including an Action Plan.</p> <p>DBC have developed a handbook for the regions that describes the expectations from a Destination Development perspective, the resources on the ground and the services that they are providing to support the planning processes.</p> <p>DBC has developed 10 year Destination Development Plans. There are about 200 communities throughout the province. DBC divided the province into 20 planning areas that have gone through a specific planning framework. The planning areas were developed based on corridors of travel, or clusters of communities with a common set of visitors, common experiences and potentially common development needs. The planning areas all now have 10 year strategies. DBC is now working on 1 to 3 year Action Plans for those strategies.</p> <p>DBC is in the process of working with the provincial government to write the first 10 year provincial Destination Development Strategy.</p> <p>DBC is also working on the establishment of a Regional Strategy, that will incorporate more stakeholders, and combine a Destination Development Strategy and a complementary Marketing Approach for each region.</p>

DESTINATION BRITISH COLUMBIA cont.

Focus	<p>The following are some of the focuses that DBC has at the moment:</p> <ul style="list-style-type: none"> • Destination Development and Industry Learning • Increasing the quality of Regional DMOs to become sophisticated Digital Marketers • Training the Visitor Centers (There are also other components focusing on the visitor experience. There are 112 community Visitor Centers located throughout the province. Destination BC has a team working with the Visitor Center network. Destination BC supports the Visitor Centers with funding. The Visitor Centers have to go through training in order to use the Destination BC brand). • Cooperative Marketing Partnership programs based on Product Experiences • Strong partnership with Indigenous Communities - Help to develop Marketing and Development Plans • Real time Visitor Information Service through online tools and other solutions. • Political influence and Policy Making • Municipal & Regional District Tax Program (MRDT)
KPIs	<p>DBC publishes annually the publication the Value of Tourism. It summarizes information on the economic value the tourism industry contributes to the province.</p> <p>The following information is to be found in the publication the Value of Tourism:</p> <ul style="list-style-type: none"> • Contributions to the economy TOURISM REVENUE / Total revenue / Tourism revenue by sector / Estimated room revenue / Tax revenue / Export revenue GROSS DOMESTIC PRODUCT (GDP) / GDP by sector / GDP by primary resource industry / Tourism Price Index (TPI) • Business and people TOURISM BUSINESSES / Total businesses / Total businesses by size / Tourism businesses by sector / Tourism businesses by region TOURISM EMPLOYMENT / Direct employment / Tourism employment by sector / Tourism employment by region / Wages and salaries / Wages and salaries by sector / Average compensation per employee • Market of origin Overall visitor volume and expenditures / Domestic visitor volume and expenditures / International visitor volume and expenditures <p>DBC is also looking into new ways of measuring and evaluating the performance; among others:</p> <ul style="list-style-type: none"> • Establish a common KPI system, to ensure the measurement methods and quality. • To measure and demonstrating success of planning processes. • Methods to measure marketing type performance. • DBC has tracking tools, a lot of sophisticated tools, to measure travelers and who they are and where they are going and what they are doing. • DBC is also looking at measures of social and cultural sustainability.
Stakeholders involvement	<p>DBC has defined as they call a Tourism Ecosystem; a network of organizations and partners that are collaborating in the development of British Columbia. This has also led to a network of local partners and stakeholders that have never come together at planning tables before. The indigenous governments, local governments, tourism businesses, regional districts and different ministries who have regional representatives throughout the province have all come together in these planning forms.</p> <p>DBC has developed a new network of core stakeholders, focusing on long term Destination Development. This has brought a new group of organizations and stakeholders together, and they will stay together throughout the process of implementation.</p> <p>DBC has continuous dialogue with the Regional DMOs. They have monthly meetings.</p> <p>The Regional DMOs have relationships with their partners on the ground; local governments, regional districts, economic development groups, tourism businesses and City DMOs/Local DMOs.</p>

VISIT COUNTY DURHAM

Organization	<p>Visit County Durham (VCD) is a Destination Management Organization funded by Durham County Council.</p> <p>VCD works closely with VisitEngland and a wide range of public and private sector partners and tourism businesses.</p>
Staff and board	<p>VCD has a board of directors drawn from the public and private sectors.</p> <p>VCD has 14 full time employees and 2 casual employees. The organization has a Managing Director, a Marketing & Communication Manager, a Partnership & Commercial Manager, a Destination Project Manager and a Project & Research Manager.</p>
Physical location	VCD has one office located in Durham City.
Financing	<p>VCD is funded through 88 percent public sector funding from Durham County Council, and 12 percent private sector contribution. The private sector contribution is mainly for marketing campaigns.</p> <p>VCD has about 300 members and low membership fees. It is not an exclusive membership. VCD promotes everybody. Members get an enhanced package of benefits like more promotion, access to training, networking events and all sorts of added benefits. There is also another level of partnership which is called strategic partnership.</p> <p>VCD is not a funding body and does not distribute funding, but works with funding bodies and supports on evaluating funding for tourism and infrastructure development.</p>
Plan and strategy	<p>VCD has a Tourism Management Plan. First one was published in 2007.</p> <p>The Tourist Management Plan is reviewed, but not changed, annually. The plan has eight priorities specific to the needs of the County and VCD. VCD is checking progress against these priorities on an annual basis.</p> <p>The Tourist Management Plan is being refreshed every 4 year. It takes about a year to produce including extensive consultation with all the stakeholders; private sector, public sector, tourism businesses and any who have got an interest or an impact on the visitor economy. VCD also makes it sure that it is aligning with the policies and business plans of the National Tourist Board.</p> <p>The Tourist Management Plan is being used also by the Planning Department in Durham County Council.</p> <p>Any planning application that has even remotely an impact on the visitor economy, comes through VCD.</p> <p>VCD works close with planners and provides Strategic Fit Assessments in order to evaluate on investments and development projects.</p> <p>The Tourism Management Plan is all evidence based.</p>
Focus	Among the areas that VCD focus on the following can be mentioned: Marketing and Information, Partnership and Business Support, Research, Product Development, Quality and Visitor Experience, Food and Drink, and Customer Service.
KPIs	<p>VCD does Economic Impact Assessments through the STEAM model. The STEAM model quantifies the economic impact of tourism from both day and overnight visitors, and provides information on overall visitor numbers, spending and jobs created.</p> <p>In order to measure Visitor Satisfaction, VCD has just started to look into Tourism Sentiment Index (TSI), that is a new research method analyzing social media and online conversations.</p> <p>VCD has also been doing Perceptions Research, since they are also responsible for the Place Marketing and Place Branding for Durham.</p> <p>All marketing campaigns are evaluated. VCD measures website traffic, monitors social media statistics and does visitor segmentation to inform into the Marketing Strategy.</p> <p>VCD also makes GAP-analyses for example on accommodations in order to attract developers and encourage investments.</p> <p>Furthermore VCD does sectoral research on various themes.</p> <p>In the Visit County Durham Market Intelligence overview the following research is listed:</p> <ul style="list-style-type: none"> • Reports Volume & Value of Tourism / Visitor Survey / Visitor Segmentation / This is Durham Website Evaluation / Visitor Accommodation Development Assessment / Pocket Guide Evaluation Research • Information collections T-stats / Tourism Product Investment Monitor • Resources Destination Fact sheet / Visitor Economy View / Visitor Economy Fact sheet / Volume and Value of Tourism (key area breakdown) / Visitcountydurham.org Corporate Website
Stakeholders involvement	<p>VCD involves stakeholders in many different ways in their consultation process when preparing the Tourism Management Plan. Furthermore, VCD holds a series of workshops and invites tourism businesses along.</p> <p>VCD has started to use a model taking into account the views of the visitor, the environment, residents and businesses.</p> <p>VCD has the ambition to be visible and attendant.</p> <p>VCD sends out a weekly newsletter to all their partners.</p>

DESTINATION GREAT LAKE TAUPÔ

Organization	<p>Destination Great Lake Taupô (DGLT) is a Regional Tourism Organization</p> <p>DGLT has become involved in Destination Management issues in the last 5 years.</p>
Staff and board	<p>DGLT has around 10 staff that work in the information centres. The other staff are one General Manager, one Trade Manager, one Conference and Incentives Manager and one Digital manager, and support staff that contribute to these areas.</p> <p>The activities within Destination Management are largely ad hoc and responsive rather than proactive.</p> <p>The investment in Destination Marketing has been held static and new resources have been allocated to Product Development and Destination Management issues.</p> <p>DGLT works with one regional organization; the boundaries of the Taupô District match the Regional Tourism Organization.</p> <p>The DGLT board is a skills based board appointed by the elected council of the district. The board comprises 6 people who are selected from applications. A mix of tourism skilled people, also digital, and other capabilities. Half the board members come from within the district and half are from outside the district.</p>
Physical location	<p>The DGLT office is located in the township of Taupô. DGLT also has corporate offices co-located with events team, the town promotional agency and the local economic development agency.</p> <p>DGLT has one visitor information centre in Taupô and another in Turangi.</p>
Financing	<p>DGLT has limited budget and resources to have a highly active role in Destination Management.</p> <p>DGLT is funded by a grant from the Taupô District Council (75%). In addition, DGLT receives revenues from advertising and marketing income for specific services such as website marketing, brochure displays and commission sales of tourism accommodation and experiences (25%).</p> <p>Funding is not being distributed as such.</p>
Plan and strategy	<p>DGLT does not have a specific Destination Management Plan for the whole region.</p> <p>Consultant reports have been prepared; 'GREAT LAKE TAUPÔ Visitor Economy Sub Regional Strategy' and on larger regional level 'WIDER BAY OF PLENTY Regional Tourism Strategy'.</p> <p>DGLT engages largely in two areas. First at the planning stage when documents and plans are prepared. Second when individual consents are sought and submissions are made in support of the proposed developments.</p> <p>DGLT reports to the Taupô District Council on a quarterly basis, and also prepares a business plan that is approved by the council.</p>
Focus	<ul style="list-style-type: none"> Marketing is the principal focus for the organization. DGLT gathers information about the visitors and draws on national sources of visitor information. Does not do any research outside understanding the customer better. DGLT facilitates education of the tourism industry through hosting training courses and running specific activities for them. Product development is a core role of DGLT. Supports and assists potential operators with information and also advices about the market and the regulatory environment. Innovation largely comes from the private sector. DGLT has been active in roading, land management, urban design and other issues that impact upon the long term attractiveness of the destination. Infrastructure is the responsibility of other agencies. DGLT's role is increasingly to provide tourism information to ensure that the interests of the visitor are taken into account as well as ensuring that the destination continues to meet visitor growth demands. <p>Focus has been to ensure continued growth of the tourism industry, and to maintain the share of the domestic market while growing the market share of the international market.</p> <p>Key challenges have been around the impacts of growth in tourism numbers without the consequent investment in infrastructure.</p> <p>With visitor numbers growing at a largely sustainable rate DGLT has been interested in ensuring that there is investment in core infrastructure to sustain this growth. In addition, DGLT wants to ensure that the destination retains its environmental attributes that attract visitors.</p> <p>DGLT has also been active in supporting new product development that aligns with the visitor offer in the destination.</p> <p>Key challenges are influencing those with the responsibility of managing and developing core infrastructure to accommodate tourism and visitor growth.</p> <p>In the next decade there is a need to invest in new infrastructure and products to sustain a high quality visitor experience. Ensuring that funds are available and the infrastructure is in place before the growth is the challenge.</p> <p>DGLT is being active in ensuring that the tourism economy is heard in funding issues, roading, aviation and environmental quality issues.</p>

DESTINATION GREAT LAKE TAUPÔ cont.

KPIs	<p>The performance of the destination is measured by economic measures which are carried out at a national level. https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/tourism-and-the-economy/</p> <p>In addition, DGLT surveys visitors about their satisfaction with the destination. DGLT also surveys operators with their satisfaction with the performance of DGLT.</p> <p>Additional research is being made to assess the economy of the region on an annual basis. As part of this process DGLT gets commercial information about credit card spend in the district.</p>
Stakeholders involvement	<p>The stakeholders are the Taupô District Council, the tourism industry and also the public generally.</p> <p>DGLT partners on international marketing with surrounding Regional Tourism Organizations. This co-operative of regions then partners with Tourism New Zealand (the National Tourism Organization) to market internationally.</p> <p>DGLT interacts with a range of national government departments that are responsible for aviation, roading, national parks and other resource issues.</p> <p>DGLT reports to the Taupô District Council. Other stakeholders are engaged by regular industry meetings around the district.</p> <p>DGLT also connects with other organizations on a case by case basis.</p> <p>The stakeholders maintain an active interest in the work of DGLT. In addition, DGLT engages with them on core marketing business and the website content on an ongoing basis. In the marketing space there is always activities that require engagement with the key stakeholders.</p> <p>The board is governed by a trust and the trust has an annual general meeting which is open to the public. In addition the board meetings of DGLT are open to the public. DGLT also invites various segments of the tourism industry, either geographic or segments and meet with them informally during the board meetings.</p>

NORDLAND FYLKE – VISITOR MANAGEMENT

Organization	<p>The pilot project Visitor Management in Nordland Fylke (VMNF) started in 2018. It was preceded by a pre-project in 2017, which led to a political decision to start the pilot project.</p> <p>VMNF is a pilot project over 3 years that can be extended to 5 years after evaluation. The mandate of VMNF is to develop methods and tools for Visitor Management. It is essential that this is being integrated into other functions that in one or another way concern tourism, for example the planning and environmental departments.</p> <p>VMNF does not only want to create a new “system” of Visitor Management that runs parallel to the existing ordinary administrative or political systems. VMNF would rather take more time and involve the administration and politicians so that the system and practices can be changed from within, to become a part of the Regional Planning Strategy, and having Visitor Management as a part of the regular system and not something external.</p>
Staff and board	Two people are working with the Visitor Management pilot project. It is managed within the Business Development department of Nordland Fylke. VMNF is working with 8 local government councils.
Physical location	Nordland Fylke (Nordland County Council), Bodø.
Financing	<p>VMNF gets basic development funding from Nordland Fylke. VMNF gets 3 million NOK each year. The local government has also put in 3 million more, among other things for municipal infrastructure, so that the VMNF project can support the infrastructure locally to solve problems.</p> <p>Then it is up to VMNF to also participate in other projects and apply for more funding in connection to these.</p>
Plan and strategy	<p>Northern Norway Tourist Board developed a strategic compass, that is being implemented in the whole of Northern Norway. More info about the connected toolbox and strategic work is available at https://brand.nordnorge.com</p> <p>There is today no National Tourism Strategy in Norway.</p>
Focus	<p>To form new methods and useful tools for the local councils that want to put effort into the tourism industry. To avoid possible conflicts and challenges from tourism, and at the same time create opportunities for local value creation and experience based tourism as an industry.</p> <p>There is a focus on Experience Economy approach, rather than Tourism Industry approach.</p> <p>There is a focus on a more professional management of tourism.</p> <p>Instead of only focusing on Sustainable Tourism, the emphasis is on Sustainable Communities where tourism has a positive role to play.</p> <p>There is a strong focus on local community involvement.</p> <p>Efforts is being made to increase the knowledge about Visitor Management in decision making towards politicians.</p> <p>Focus on responsible marketing, meaning that marketing is being done with respect for places and in dialogue together with the local communities.</p> <p>Research within the legal instrument of the planning and building act, and the interplay between public planning and market mechanisms.</p>
KPIs	<p><i>“When you look into how and what we monitor and how we measure success in tourism, it is focusing on the number of guest nights and the economic impact and such. There is little measuring of the degree of infrastructural damage, or how much extra energy is being used when expanding to being able to serve the tourists. We do not have, holistically, methods for measure tourism.”</i></p> <p>It is partially an ongoing debate at national level in Norway, that there is a need to set up a system for measuring the value of untouched nature and exploitation. For example when wind energy parks are built, areas used for nature tourism are affected. It is the same with fish farming in the fjords, that may limit the condition for coastal tourist experiences. Those values are normally not considered.</p> <p>One challenge is also to assess economic values compared to non-economic values. It is a big dilemma. How does one systematically measure good experiential quality for visitors, quality of life for local residents, social sustainability and such.</p> <p>There is talk about moving “from volume to value”. That means quite a big paradigm shift on how you measure values, and also what values to include.</p> <p>There is also a need to shift from maximization to optimization.</p>
Stakeholders involvement	<p>There is a need to understand tourism on a foundational level, to be able to find real solutions. One of the foundational levels are the bottom-up perspective, which is also about the local community. Different districts can have different needs and approaches. So, it must be able to be customized locally. It also depends on what kind of tourist operators you have got, what other interests you have got and more. So, you need to find the right mix in connection to the local community.</p> <p>VMNF is testing a method they call Crash Course on Visitor Management for Community Associations. Aiming to educate the local communities in Visitor Management, so that they will be able to have input in the democratic processes around Physical and Urban Planning and Destination Development. It is also about letting the local community participate in the stories being told about their place.</p>

VISIT SVALBARD

Organization	Visit Svalbard (VS) is a DMO owned by the member organization Svalbard Reiselivsråd (Svalbard Tourist Board).
Staff and board	<p>The organization today has 5 full-time employees, that will probably will become 6 during 2019. In addition to that also 2 more who are contracted within projects. And then also people employed in Tourist Information.</p> <p>VS has something that could be considered a Market Department focusing on marketing, and a Development Department. In addition to that VS has one person working towards Svalbard Cruise Network that is both about development and market.</p> <p>The board of VS is composed primarily with people from the tourism industry. There are both small scale and large scale stakeholders in the board, and as well someone from the harbor, someone from the airport and such. The largest actors are represented in the board, which is of great importance for the direction and the ability of the board to be able to exercise influence. It is important to have them engaged in the organization.</p>
Physical location	<p>VS has one office, located in Longyearbyen.</p> <p><i>"It is important to be visible, not only for visitor information purposes, but for the local community and for the members of the destination, and also for those who are not member but are operating in the area. And not at least, also in order to communicate that you are an independent organization."</i></p>
Financing	<p>VS is financed about 50 percent from the members. From membership fees, and services that the members pay for. About 10 percent of the funding comes from the Ministry of Trade, Industry and Fisheries. The rest of it are projects that VS applies to get funding for. There are also development projects with money from various public institutions and foundations, as the Environmental Agency and Innovation Norway.</p> <p><i>"It is interesting that it is the industry led organization that itself is financing it, what is really a matter of community development. Something that strictly speaking should be financed by some type of public funding."</i></p>
Plan and strategy	<p>VS has an annual Action Plan based on the Master Plan for the region.</p> <p>The Master Planning is being made typically with a 10-years perspective. VS evaluates how far they are every 3 years, and then point out the priorities for the next 3 years.</p> <p>VS has two General Assemblies – one in May and one in November. The Action Plan for the upcoming year should be decided upon during the General Assembly in November. The process for next year starts on the General Assembly in May; members are being asked to provide input, thoughts on adjustments, aims and targets.</p> <p>Norway does not have any National Tourism Strategy, nor superior plan or direction of the tourism industry.</p>
Focus	<p>Marketing is still an important function, but much more focused on digital solutions; on social media and content production – both in text, in images, in videos and it all, where influencers, and the guests are participating in the marketing communication.</p> <p>VS focus on local community development; working politically, on local administration, to facilitate and maximize the dimension of experiencing at the same time as the negative footprints are minimized.</p> <p>VS has been using the processes of Master Planning, networking, and the work around the sustainability certification in order to concentrate and to force themselves to find common solutions.</p> <p>VS will continue to focus further on Sustainability.</p> <p>VS has been focusing on building up their own booking system through their website.</p>
KPIs	<p>VS has statistics for arrivals and guest nights, and looks at the volume needed each month to operate all year.</p> <p>Most important for VS is the amount of FTEs (Full Time Employees) created within the tourism industry, which is also mentioned in their Master Plan. VS focus on tourism that contributes to building up the community.</p> <p>Furthermore VS has statistics on revenue, and they use Google analytics to analyze their activity online.</p> <p>VS also has statistics on the amount non-motorized experiences, as part of the ambition to be a more sustainable destination.</p>
Stakeholders involvement	<p>In order to reach out to everyone connected to the Action Plans VS tries to keep a close contact with all stakeholders.</p> <p>VS has a meeting room that is big enough to accommodate meetings with many people. It was something VS considered, that it is not enough just to have a plan and then send it out to all stakeholders, but there is a need to get all stakeholders, organizations and authorities to sit around the same table.</p> <p>VS invites stakeholders to meetings around topics as Sustainability, Market, Cruise Ship strategy and tries to keep the meetings focused at one topic at the time.</p> <p>VS also works intersectoral around specific topics such as decreasing usage of plastic together with AEEO (Association of Arctic Expedition Cruise Operators). Furthermore, VS works with groups outside of their organization and the members of VS are also involved in that.</p> <p>To create the dialogue and communication with the local residents is one of the weakest point of VS, but it is considered as very important and something that needs to be improved.</p> <p>It has been a strategy for VS to be a visible regional actor.</p> <p>At the General Assemblies in May and November, VS communicates statistics and how the destination is doing.</p>

VISIT ABERDEENSHIRE

Organization	Visit Aberdeenshire (VA) is the officially recognized Destination Management Organization for the city of Aberdeen and surrounding countryside and coast of Aberdeenshire.
Staff and board	<p>VA has 16 people working in the organization.</p> <p>The board of VA is currently made up of 11 people. The composition is made up of the financiers, so the two local authorities Aberdeen City Council and Aberdeenshire Council, and then Opportunity Northeast that is a privately funded economic development agency.</p>
Physical location	VA has one office located in Aberdeen.
Financing	<p>VA does not have any membership funding, but is funded purely from the three organizations mentioned; Aberdeen City Council, Aberdeenshire Council and Opportunity Northeast.</p> <p>Opportunity Northeast is a privately funded economic development agency. It is a philanthropic organization which is investing in the economy of this part of Scotland.</p> <p>VA generates some of their own income through commercial campaigns and marketing campaigns. And from some of the trade fairs that VA attends they get income from partners who are joining. But VA is not a membership organization.</p> <p>VA does not distribute funding directly. VA subsidizes training, provides training courses that are free and that kind of things, but VA does not provide capital funding.</p>
Plan and strategy	<p>VA has a Destination Strategy, and a corresponding Business Plan for the organization. It contains priority themes that VA focus on to grow the economy, and the targets that VA sets to achieve in the next five years.</p> <p>The Destination Strategy is continually reviewed. Some things do change invariably, but the principles are still valid. It is forming everything that VA does.</p> <p>VA is focusing on 6 areas or priorities, and each one of those have an Action Plan.</p>
Focus	<p>Within the organization VA broadly has three areas of focus:</p> <ul style="list-style-type: none"> • One area is to Promote the region, whether that is a leisure destination, conferencing, business or event destination. • The second area is to help develop the visitor economy and part of that is running training schemes for local businesses so they can understand how to connect with the markets of VA, and so they can understand and connect to the opportunities coming from new investments in the region. New investments in the region includes a significantly large convention center and a new harbor that will bring in large cruise vessels. • The third part of the work by VA is the Regional Leadership for tourism, making sure that this part of Scotland has the voice in the national picture, ensuring that data is being monitored and provided to local businesses, and as well helping them make business decisions.
KPIs	<p>VA is looking at:</p> <ul style="list-style-type: none"> • Revenue, around Visitor spend - international or domestic. • Readiness of the destination from a Business Barometer and Business Confidence. • Qualitative measures from the Visitor Surveys. <p>VA is also looking at new ways of measuring sentiment using big data exercises, looking at sentiment that is posted through social media and other online channels.</p>
Stakeholders involvement	<p>VA has a very consultative take across the range of organizations; from businesses to local government and to other interested parties.</p> <p>VA has an annual conference usually in March.</p> <p>VA also has a number of events and meetings. VA has a whole series of those throughout the year based around different themes such as Food and Drink, or it could be one about Outdoor Sports, Outdoor Activities or Cultural Activities.</p> <p><i>"In terms of what has happened, I think we have a more cohesive local industry. It is a very disparate, spread out community. People do not live close by to each other so there is quite a lot of work to do to bring local businesses together. But we are starting to see a more common approach."</i></p>

OUTER HEBRIDES TOURISM

Organization	The DMO Outer Hebrides Tourism (OHT) has existed about 10 years. In 2005, following re-organization of the national body VisitScotland and the ending of the Western Isles Tourist Board, a number of island businesses formed Outer Hebrides Tourism Industry Association (OHTIA) in order to ensure that local tourism interests had a voice. This later became a community interest company operating as Outer Hebrides Tourism.
Staff and board	<p>OHT has 3 official employees. If adding the volunteers team is about 8 people.</p> <p>OHT has an over body which is called a leadership group which consists of themselves, the council, Visit Scotland which is the national tourism agency, and the investment agency - the development agency for the islands. The four are all set on a single group and emphasize very much on Destination Management.</p> <p>OHT has a 13 people board comprised of people from the local tourism industry and also other industries, from North Uist Development Company, and the CEO and Tourism Development Officer of OHT.</p>
Physical location	<p>OHT has one office in the town Stornoway.</p> <p>There are also two VisitScotland Information Centres; one in Stornoway and the other in Tarbert Harris.</p>
Financing	<p>OHT is financed through member funding, project funding and grants.</p> <p>Most of the funding comes through applications. For example, Scotland runs a themed year program, so next year is a year of Coastal Waters. Last year there was a project called the Rural Tourism Infrastructure Fund which was specifically to trying to address some of these hotspots where places were being overrun by demand. Also through Natural Heritage Agency and more.</p> <p>The council supports some of the marketing campaigns.</p>
Plan and strategy	<p>OHT has a Strategy Chart. OHT tries to integrate their objectives into the National Strategy – Tourism Scotland 2020.</p> <p>OHT tends to do an Annual Review of their Strategy.</p> <p>OHT does sort of a yearly Action Plan, but it is more about agreeing on priorities. It is changing slightly now over to more formal objectives, and into a 3 years plan. It has been more informal in the past.</p> <p>OHT has an annual planning session when they meet and decide what OHT is going to do that year. Both marketing and management.</p>
Focus	<p>OHT has split things into five areas:</p> <ul style="list-style-type: none"> • Strategy; keeping all the different agencies aligned, so making sure that things are joined up. OHT has four big projects that they are trying to develop, all of whom are quite important, but they have to work in a joint up way. They all want to do the right thing. • Product Development, involving lots of project boards and just make sure that they are aligned to the strategy. • Marketing • Stakeholder Management, which is both national and local. • Member Benefits; for example the website that works and gets bookings. OHT produces leaflets and merchandise. There are lots of services that OHT offers. <p>Examples of activities:</p> <ul style="list-style-type: none"> • Product Development, Customer Journey, Transport, Food & Drink, Connectivity, Quality & Skills Development, Labour, Accommodation and Marketing
KPIs	<p>Survey of Visitors gives OHT the overall numbers of Volume and Value.</p> <p>OHT also makes a survey that provides some confirmation, at least on high level, about where they are heading.</p> <p>OHT will start to look more into Qualitative measures around Visitors.</p> <p>OHT finds it quite difficult to measure the intersection between product and place. For Outer Hebrides the population growth is the ultimate objective, and the emphasis is to be attracting more young families.</p> <p>The surveys are available online at www.visitouterhebrides.co.uk/industry/information</p>
Stakeholders involvement	<p><i>"I think because we are islands we tend to be talking about Destination Management, because everything you do you tend to have a transport and an accommodation consideration. Much more so than the mainland."</i></p> <p>Among the stakeholders OHT has the Leadership Group that is absolutely crucial, with representatives of OHT, The Council from the islands, Visit Scotland and the Investment/Development Agency for the islands. There is also the Community Trusts that own most of the land. Then the businesses on the island and the islanders – the community.</p> <p>OHT has an annual meeting once a year, or more likely every two year.</p>

SCOTTISH TOURISM ALLIANCE

Organization	<p>Scottish Tourism Alliance (STA) was formed 7,5 years ago. STA is the representative body of the Scottish tourism industry. The organization comprises around 275 members who are trade associations, businesses, destination groups and other organizations with an interest in tourism.</p> <p>Scotland consists of 32 local authorities, and STA estimates that there are around 45 regional destinations with their own governance and structure.</p> <p>The STA leads the facilitation, coordination, ongoing development and delivery of the National Tourism Strategy.</p>
Staff and board	<p>STA has a team of 6, whereof 3 are part time. Two Communications Directors, a Digital Manager that works 50% on STA and 50% on the National Strategy, a Finance Manager, a Business Development Membership person, and then the CEO and finally a Tourism Strategy Project Manager and Coordinator for the National Tourism Strategy.</p> <p>STA is governed by a board with representation from all sectors within Scotland's tourism industry.</p>
Physical location	STA has an office in Stirling. The team works remotely.
Financing	<p>The actual financial model of STA is based in membership funding. There are also contract arrangements in the agreements that the industry supports with various services as travels, office space, accommodation and more.</p> <p>Some local governments do contribute to the DMOs with public funding, some do not.</p>
Plan and strategy	<p>The current National Tourism Strategy – Tourism Scotland 2020 (TS2020) – was made in 2012. Scottish Government invited the industry to lead the development of a National Tourism Strategy. That strategy was starting to focus on Destination Management. Further development looking at Destination Management has happened last 12-18 months.</p> <p>At local destination level, each one of their own local strategies have their own local action plans to support and deliver against the aims and ambitions at local level.</p> <p>Things like the Growth Fund, application processes, National Tourism Award are all aligned to the aims and objectives of the National Tourism Strategy.</p> <p>The first two three years of the National Tourism Strategy STA had a quarterly report done on performance targets and what has happened. Sub-sector strategic plans have been developed; there is one for the Marine Tourism, one for Heritage and Culture, the Golf Tourism Strategy and there has been on Adventure Tourism.</p> <p>TS2020 is updated quarterly, and highlights case studies and various activities and what has been taken place across the country.</p> <p>It is presented through a National Conference and a couple of workshops around the country within March. STA also does national updates at sub-sector conferences.</p>
Focus	<p>STA is the main overarching trade body for the tourism sector, and is fulfilling an advocacy role on behalf of the sector.</p> <p>STA is the guardian of the National Tourism Strategy and leads that process and its development. STA coordinates a Tourism Leadership Group that is constituted with both the industry, the Scottish Government and the Public Sector Agencies.</p> <p>In addition to the National Tourism Strategy STA also co-leads, and is responsible for, the Food and Drink Tourism Strategy, in partnership with Scotland Food and Drink.</p> <p>One of the focuses has been to change culture and to start to work more together. The biggest step over the last 6-8 years has been the sharing of data and being open.</p> <p>STA tries to make the politicians and those who are in business in the community, more aware of and familiar with the tourism industry in terms of impact and job creation.</p> <p><i>"Our immediate aim is looking at workforce development. We do not have enough people working in our industry. How do we change that perception and continue to grow a future workforce?"</i></p> <p>Another aim of STA is to look at how to disperse volume. So, grow value not volume necessarily. There is a need to become better at dispersal of tourists. Another aim is to extend seasonality.</p>
KPIs	<p>STA looks at Employment and Job Creation, attracting New Enterprise Creation, Development of New Markets, Incremental Spend by Visitor, Satisfaction (NPS) and Economic Impact.</p> <p>The Economic Impact in terms of spend, and Job Creation is something that obviously predominately attracts the attention from the Government.</p>
Stakeholders involvement	<p>The industry was very engaged in the initial build of the National Tourism Strategy. There was a natural desire and willingness to contribute and shape their own national strategy.</p>

VISIT SCOTLAND

Organization	<p>VisitScotland is the national tourism agency for Scotland. It is an executive non-departmental public body of the Scottish Government.</p> <p>VisitScotland engages with several regionally based tourism groups and organizations. In several organizations VisitScotland staff sit on the boards or steering groups and are actively involved in influencing activities and helping to shape strategies.</p> <p>VisitScotland estimates that there are around 25 regional Destination Organizations in Scotland and about 16 national sector/themed groups deemed to be 'significant' because of their scale, activity, resources (in terms of budget and people) and ability to deliver.</p>
Staff and board	<p>The VisitScotland organization is built up around the Chief Executive's Office, the directorate of Corporate Services, the directorate of Events, the directorate of Industry and Destination Development, and the directorate of Marketing, Digital and Brand.</p> <p>The board of VisitScotland is comprised of professionals from the tourism industry, local authorities, university, business development and entrepreneurship, economy, and digital services.</p>
Physical location	<p>The main office of VisitScotland is in Edinburgh. VisitScotland has got about 10 regional offices, and then 26 local offices through the Information Centre network.</p>
Financing	<p>VisitScotland is funded by the Scottish Government.</p> <p>The local DMOs are small and have often very limited resources.</p> <p>Local tourism organizations rely on a wide range of funding sources to support their core objectives and delivery activity. Despite a wide range of business models, governance structures and funding approaches, there appears to be no one model that works consistently and is proven to be sustainable.</p> <p>There is one operating model of a TBID (Tourism Business Improvement District) covering the Inverness/Loch Ness area. This is being considered by some Destination Organizations as a possible more sustainable approach to funding. On the back of the recent Scottish Government budget announcement, several local authorities are also pursuing the idea of introducing a transient visitor levy (TVL) as a possible solution to funding local tourism activity and development.</p> <p>In 2004 there was a network of what was called Area Tourist Boards, funded by the councils in Scotland. None of these were sustainable and none of these survived because they did not have sufficient funding to keep them going. They were all predominantly marketing organizations.</p> <p><i>"My conclusion is that there are no sustainable funding model that applies anywhere in Scotland in terms of a local Destination Organization. It tends to be skewed towards providing benefits for those who are paying."</i></p> <p>VisitScotland has a Marketing fund, a Growth fund, that encourages collaborative projects, and a number of destinations throughout the country have tapped into that to do collaborative marketing activities.</p> <p>VisitScotland is also administering a Rural Tourism Infrastructure Fund, that exists because of lot of extra pressure on the more sensitive parts. It is being channeled through local councils who work with local communities.</p> <p>VisitScotland will try to find more effective ways of supporting destinations without actually giving them money. Public money is under pressure.</p>
Plan and strategy	<p>VisitScotland has a 3 year rolling framework. It is being reviewed every year.</p> <p>VisitScotland is in the process of developing 4 Regional Leadership Plans, that will look at the 4 large parts of the country and identify what issues and challenges each areas is facing. VisitScotland is then developing a response to that, which then will be shared with the appropriate destinations that make up these larger areas.</p> <p>In particular, VisitScotland works closely with the Scottish Tourism Alliance to contribute to the delivery of the National Tourism Strategy Tourism Scotland 2020 and, as part of the Cabinet Secretary's High Level Working Tourism Working Group, VisitScotland is focusing the future of tourism beyond 2020.</p>
Focus	<p>As the lead delivery agency for the visitor economy, VisitScotland will focus its resources on marketing Scotland with the aim of attracting domestic and international visitors.</p> <p>As a Non-Departmental Public Body VisitScotland will also act as advisor to Scottish Ministers on tourism matters and policy affecting tourism and businesses which are part of the visitor economy. In so doing, VisitScotland will work with their sponsor department to ensure tourism is taken into account across all Government policy. Similarly, VisitScotland will work with their colleagues in Scottish Government to influence policy reserved to Westminster, but which may have an impact on the visitor economy in Scotland.</p> <p>VisitScotland's core purpose is to stimulate new and sustainable growth in the visitor economy.</p> <p>The biggest area at the moment is much greater focus on the Customer Journey based on analyzing social media. What visitors are saying about transport, accommodation, eating and drinking, retail, events, festivals and attractions.</p>

VISIT SCOTLAND cont.

KPIs	<p>There is a need of more evidence led approach to Destination Management and Development.</p> <p><i>"The biggest thing our National Tourism Strategy document has done, is to encourage collaboration. I do not think the strategy has had a massive influence on investments. I do not think that the strategy development has been driven by data or evidence."</i></p> <p>VisitScotland is moving from annual Visitor Surveys to be working more with Real Life Data through scanning social media.</p>
Stakeholders involvement	<p><i>"Probably the biggest player at local level in terms of development and management and the ability to influence are the local councils, because they have the resources, they have the responsibility for the roads, they have the responsibility for the public role and the planning."</i></p> <p><i>"It needs to be a collaborative effort, but in many cases the Destination Organizations do not have the resources to make a significant difference, and that is absolutely the challenge."</i></p> <p><i>"VisitScotland developed National Tourism Development Framework 5 years ago. The whole idea was to try and influence planning authorities to treat tourism more seriously than they had up until now. What we discovered was that when you spoke to local authorities they also thought tourism was very important. Yet when you looked at their plans, more than half of them were silent on encouraging tourism development in their areas."</i></p>

SWEDISH LAPLAND VISITORS BOARD

Organization	<p>Swedish Lapland has been active within Destination Management since around 2012. Swedish Lapland Visitors Board (SLVB) is the official representative for the hospitality industry of Swedish Lapland.</p> <p>Swedish Lapland consists of 16 local destinations.</p>
Staff and board	<p>SLVB has 19 employees.</p> <p>Most of the employees work within Market Development, including Travel Trade, Image Marketing and Digital Communication. SLVB also has staff working with Business and Product Development, Destination Development, and other various development projects and research.</p> <p>The representatives in the board of SLVB are the MD of STF (The Swedish Tourist Association), the local government commissioner of Arjeplog, key individuals from the local tourist sector, Invest in Norrbotten, the Enterprise Commissioner for the County Administrative Board and the Chairman of Destination Kiruna Lapland.</p>
Physical location	<p>The biggest office of SLVB is located in Luleå. SLVB also has an office in Kiruna, one person in Gällivare, one in Skellefteå and one in Hamburg in Germany.</p>
Financing	<p>The 16 local destinations are members of Swedish Lapland, and the companies are in through them. The companies are members of the local destinations.</p> <p>Swedish Lapland is financed through a small basic funding from Region Norrbotten, and from membership fees from the local destinations. This part only cover the salary for the Managing Director and one more.</p> <p>The rest of the funding comes as project funding.</p> <p>SLVB does not distribute funding.</p>
Plan and strategy	<p>SLVB has a Regional Tourism Strategy. The strategy document does not contain any action plan, but it is more general. It is more a strategy that sets the direction. It is made on a 10-year perspective, and SLVB has been following it up about every 3 years.</p> <p>SLVB prepares Annual Reports for the projects that they run. SLVB also makes regular reports on the market work and the focus areas that their projects concern – Business Development and Market Development and then also an Annual Financial Report.</p>
Focus	<p>SLVB is the regional Destination Organization, strategically responsible for carrying the work forward, and also in many cases the coordinating partner towards the owners of SLVB who are the local destinations.</p> <p><i>“Looking into the different stages in our approach, you could say that we have went from “Samarbete”, to “Samverkan”, to “Samhandling” – from Collaboration, to Cooperation to Collective Action. We are now in the next stage, where we talk about how we can take this further.”</i></p> <p>SLVB runs various projects as for example Destination Capacity Building in Swedish Lapland, Business Capacity Development in Swedish Lapland, Visit Arctic Europe and Nature Tourism in Swedish Lapland.</p> <p>SLVB does on-going Evaluation & Research on all of their projects.</p> <p>Sustainability is one of the most central topics for SLVB to focus on from now on.</p> <p>SLVB also focus, and have done so for many years, on digitalization.</p>
KPIs	<p>Until now SLVB has measured progress in terms of turnover, tax incomes, guest nights divided into domestic and international arrivals and the employment rate within tourism.</p> <p>SLVB also follows how the visitor industry develops compared to other industries.</p> <p>Since the aim is to double the turnover from tourism, between 2010 and 2020, that has been the main focus for SLVB. But it is not certain that SLVB will continue in the exact same way further on within the new strategy that will be launched next year.</p>
Stakeholders involvement	<p>SLVB has created a strong connection between people, where people know each other in the tourism businesses and the destinations.</p> <p>SLVB arranges an annual Tourism Industry Day for all of their stakeholders, where trends and business intelligence are presented. SLVB showcases what has been achieved together during the latest year, and how they want to continue the work together.</p> <p>SLVB has networking meetings on regular basis. Both with destination employees but also where all meet together, where the businesses also partake. These are also important in order to build trust, reliance and to motivate to work continuously together.</p> <p>Towards the other stakeholders who are a bit further away, SLVB needs to communicate and show what is being achieved. By doing so, this has led to closer relationships. SLVB is invited to planning processes much earlier, and has become a more natural partner that many reach out to when there are questions relating to tourism.</p>

Lesson learned

The studied DMOs were asked to share lessons learned by answering the following questions.

What would you list as main success factors, and what to emphasize on when building up a DMO?

What can be the pitfalls, and what should be avoided?

The answers have been categorized and organized.

Organization

- To build up trust between each other has been of central importance for us. Also trying to direct the work in a way that allows certain competences to do what they are good at, so that everyone does not have to be in everything. To see what specialties we have, we who work together, and how we use it in the smartest way.
- Often small communities lack the specialist skills to cover all the range of issues that destination management might require. Therefore there is a need to ensure that there is access to the specialist skills that are required.
- The board must have the strategic capacity, which also brings legitimacy and power to the organization.
- It can be a pitfall if you start under the wrong conditions; insufficiently organized, under financed, weak or poor leadership. That you are not employing the capacity, but just what you can afford.
- Pitfalls include
 - Political vs skills based governance
 - Lack of critical mass in the organization
 - Boundaries that are unrelated to the tourism economy – the visitor does not recognize political boundaries.
- Reconciling the respective roles and responsibilities between National level policies and plans and regional policies and plans is vital.
- A critical factor is funding and clear accountability to the region or district or municipality. In particular there are needs for tourism to be represented in the key decisions that affect tourism in the region.

Evidence

- What is the best way forward is to always be insight driven. Do not just assume you know best, but try to go and find the evidence that suggests that this is the most productive way forward.
- It is important to listen to each other, and to the market. To have the ears to the ground. It can be dangerous to stay fixed to a plan, but it is important to have the ability to adjust and be flexible around the efforts that has been decided upon.

Confidence

- Within the community where we operate there will always be strong voices that will argue that we should be doing one thing, or we should be doing another, or we should put more focus onto something or another. Make sure that you stand by your plan and stand by your principles of what the research says is the best way forward.
- To be successful in building up a DMO, you need to have a good plan, and you need to have strategic thinking. And this must be connected to how you are building up the organization. You must be able to think, and work with a long-term mindset. That is probably what is most important. To understand where you are, where you are going and how you will get there. Yes, you need to fine tune and adjust after time, you need to take other paths, you need to manage things as they come – but, you need to keep to certain elements and a direction that is set over a period. You cannot just jump around, and adjust from what you want to get at the moment.

Collaboration & shared understanding

- What is very important for success within Destination Management is to have the unifying function. If you are going to be able to collaborate and cooperate, you must create trust. Then the leadership is very important. You must understand that you represent and work for many various stakeholders, ensure that everyone will get their share, and avoid getting too busy with details that can become very demanding.
- Engagement of locals in our destinations is essential, as this concept only works if it is implemented by all stakeholders in the destination, so the hoteliers and activity providers all have to be convinced of this concept and pull on the same string together. The residents are also all involved, as they can participate in the organization of their DMO and election of their mayors, which decide whether to participate in this collaboration or not.
- We have had issues with different expectations of destinations and stakeholders as to what we as organization should actually have as main objectives and action plans (more internal networking versus more external marketing). It is therefore important to include our destinations in the decision making and have good communication with everyone.

Focus

- You cannot solve the whole thing. Just take something and try to get the thing moving.
- We are resource limited. So pick a few things and work on them, and then pick a few things and work on that. Do not try to solve the whole thing because you will wait a long time for it to fall into place.
- To have a very balanced approach across both Marketing and Development, but at the same time not trying to do everything. Focus on what you can do well.

Progress

- Not being too ambitious too quickly. You will not solve all problems, there are still lots in front of us.
- Those who have come further with Destination Management, they have to be very stubborn and patient.
- It is more important that you are moving in the right direction than not moving at all. Sometimes you maybe just take the small baby steps. Sometimes you maybe move slower. And then sometimes you can go faster ahead.
- Keep calm and carry on.

Mixed quotes & comments

Each of the interviews made within this study has been transcribed. The full texts are available as an appendix within the closest working group of this pre-study.

The following section contains, with no further sorting, many of the clever words that were collected.

- “ The whole idea and the term Destination Management has really come into the fore over the last 5 to 10 years, as destinations are facing increasing levels of demand that potentially can have deleterious effects on their country and their natural resources, as well as losing the social license from the residents of the destination, to actually allow tourists to be in their jurisdictions.*
- “ One of our core pillars was to build a magnetic brand. The choice of the word ‘magnetic’ was very conscious because you want obviously to be a magnet to potential visitors from around the world, but as well to our industry and our industry partners.*
- “ We recognized that there was a gap. Nobody was really looking at the long term Destination Development of the province. So, we looked at both sides, both drivers of demand, or revenue, and the supply side. The demand side driver, which is really creating that compelling communication, and the supply side which is really looking at all aspects of what it takes for a destination to create a great experience. And that involves land use policies, product development and experience development, transportation and infrastructure, labor and workforce development, investment attraction. So, there are a number of facets of what we call Destination Development that really were not being looked at over the long term. So we expanded our efforts on the Destination Development. And that is when we created a Destination Management division.*
- “ We have developed a whole new network of core stakeholders, now focusing on long term Destination Development, as compared to them coming together and advertising a promotional partnership which they have been doing forever. But this brought a new group of organizations and stakeholders together, and they will stay together throughout the process of implementation - we hope.*
- “ We are a very effective, and sophisticated, digital marketer as an organization. What are we are hoping to do, is to ensure all our Regional Destination Marketing Organizations, or our City Destination Marketing Organizations, to become equally sophisticated Digital Marketers. The big challenge is how do we get the system working in a collaborative way, where there are highly valued but yet differentiated roles up and down through the system. And that there is some alignment to long-term goals and objectives, while at the same time leaving the individual groups to be relevant and doing their own thing.*
- “ We have kind of used the analogy that we are going to be the catalyst working with industry and all the industry stakeholders across the province, as our ministry need to be the core catalyst for tourism across government. They need to be the ones that are bringing the needs of the tourism industry over the long term to their ministry colleagues or other agencies whose policies and programs could either have a positive impact or a deleterious or negative impact.*
- “ It is the experiences that create our promise.*
- “ A Destination Management Plan is absolutely crucial to anybody. If you are just a Destination Marketing Organization, then that is absolutely fine. Then you do not necessarily need something like this. But if you are a Destination Management Agency you got to have this plan.*
- “ I think of Destination Management as a house. I see Destination Development and Business Engagement as the foundations of the house. And the Marketing is the bit that sits on the top above the ground. So, what everybody see and think is wonderful and nice looking, really depends on what you do not see underneath, what pins it up.*

- “ Tourism is also using and consuming raw materials and common goods; it just happen to be that our raw materials are untouched nature, living cultural heritages and local communities. All of these are also our common properties. And if tourism is not being managed, you will ruin it. It cannot be only up to the private sector to do as it want, but management is needed. We can neither wait for the private sector alone to solve our common problems.*
- “ Our starting point is that we need to treat the tourism sector as serious, as we do with any other sector.*
- “ Destination Organizations have an opportunity to take a greater role within such things as management, but it is not that easy for them. They have traditionally been rigged for marketing and have their strength there. Their business model is also based on delivering marketing services. Management requires a different type of knowledge and competence. Management is a completely different approach than marketing for more volume.*
- “ What parts of the management would be natural for the DMOs to take on, versus the municipality that in fact already has management through local governance? It is a system within the democracy. And if the DMO will work more on the holistic customer journey, on responsible marketing, on processes together with the local community and such - What kind of competence do they need?*
- “ There is no general organization model for DMOs today, that adopts to management as a whole. Where will the DMO get the money from and what would be a resilient business model?*
- “ A discussion that has been up is if Visitor Management should be a responsibility allocated to the counties and the regions. Compared to for example environmental management, all municipalities have their own environmental coordinator and specialist. And you have a public environmental agency at national level.*
- “ Before attracting tourists to an area, I think it is important to first ask yourself - "Why should we have tourism?" and "What shall it do for us?". To think about how tourism should contribute to your community. And then you will have a completely different foundation on what to evaluate and measure.*
- “ How do you balance the volume compared to value creation? Maybe you will have a more optimal value creation when you decrease the volume, but with visitors stay longer? Or maybe you will aim to get visitors that are actually interested in what you have? It is different to get 'selfie-tourists' with the 'been-there-done-that-approach' or those who are there to learn more. So, the approach can rather be "from more to better". How do you increase the value creation, both in relation to the economic value, but also from the content of the experience that you create for your guests, or the job satisfaction for the locals, or the involvement from more people?*
- “ All industries are important. But all industries cannot be maximized, it is more about finding the optimal mix between the different industries. The other industries are also important in order to contribute to the tourist experience, so to that not all of it just consists of commercial tourism. We need what is real, the daily life and culture of the places. That is part of the attractiveness.*
- “ We need to talk about these things as 'the sense of place' and 'the encounters with people'. These things are also important for what our visitors expect, experience and pay for. Our visitors should meet a positive person who is not tired of tourists, and that is proud of their job and the product they deliver. It is about the personal meetings. That is the essence. At least for our kind of destinations.*
- “ We need to decide from our strategy, what kind of tourism we want. Then we also need to take strategic decisions on who we want to attract and how we are working with them. These decisions are far too important to only let it in the hands of one person working with marketing. It must be managed better than that.*
- “ We are talking about moving from volume to value. That means quite a big paradigm shift on how you measure values, and also what values we include.*
- “ We need to manage our natural resources and take it seriously. That is what you do within other sectors. You are managing resources. And certainly the resources that we use within tourism, those are also our common resources.*

- “ Tourism is happening locally and there must be a local management. And if there is a national interest to market and develop local places, and you are being pointed out like that, it must be done with an agreement locally. And there must be a much more closer collaboration between the national and local perspectives. That is also yet another reason why the bottom-up approach is so important.
- “ The local community must be able to have a say themselves what stories will be told about their place. When local communities are being told about or when their places are included into the national marketing, they always need to be consulted first. But it is not like that today. The criteria on what you consider to market, and the discrepancy between marketing and management is a problem. There should be a link and a responsibility between marketing and the consequences of marketing at the ground level.
- “ The public sector has realized that there are very close common interests. Destination Development and Community Development is up to 90% common efforts. When everyone understood this, and when the public sector understood that we could be, what to say, strategic partners, the whole picture changed. Suddenly the Destination Organization became a very central actor, in politics, in administration and within the governmental representation. To have a strong Destination Organization, helps to control and focus on a serious tourism industry, and at the same time, in balance, secure the interests from the industry itself.
- “ Something I believe is important is that when you are a leader in a Destination Organization, you are and should be very visible and have a major role. You must work very strategic and be active at many arenas to be visible and represent the destination. I also think that you will come to a point, when it is time to change the leader. That you bring in new energy, new power and new approaches to look at things. I consider that a leader in a Destination Organization should have the position 5-6 years, at maximum 8, and then it is time to change.
- “ During the rise of the tourism and the flourishing industry, there are many new businesses founded. Some more serious than others choose to stand outside of the Destination Organization, and they are gladly harvesting on seasonal basis. It is a big problem.
- “ Tourism is a resource based industry - in the same way as fishing industry, aquaculture industry and oil industry, we are using natural resources. But it is one of few, maybe the only, resource based industries that has no common superior coordination. It is up to each destination and to deal with this yourself. At the same time, the tourism industry is quite unprofessional in all of this – you are doing some marketing, tourism information. It is very much up to the leadership, the governance and the maturity of the destination how far you are.
- “ I think it should be more of a national responsibility to secure its destinations, and that they are functioning, governed and looked after for the many years to come.
- “ When we are working strategically, we are working both on the communication side and the development side hand in hand. If you should work with Destination Development and Experience Development, you need to add the Market side so that the communication is connected to the development desired. For example, it could be about better prepared guests, which can be about better equipped guests, community guidelines, the role of hosting and more. So, the communication connects to the Destination Management in the way that it must align.
- “ It is also important to look after the freedom of operation and action of tourism. We have a responsibility, and we need to explain that we are doing what we do in proper and good way, but we also need the freedom of action as we have it.
- “ For us, quite often what we are doing, is just building the platform and stimulating the debate, and then the real business happens among the people we bring together.
- “ We need to be making money, so making sure that we make the most of the existing capacity we have.
- “ There is a big debate now about overtourism. As a result of that people say that we should not be marketing. But marketing is the lifeblood. The demand leads to decisions about new facilities and new infrastructure. There is a risk that if we do not do any marketing, all we end up doing is to optimizing for today's demand.

- “ I can see how people like the idea of it being very organized, and they want tourism to be very planned. But, it is not like that. Now, we cannot have total chaos, but it is the pressure for places that cause people to think there is an opportunity to build a new accommodation. If there is no pressure on demand people will not build new accommodations.*
- “ We cannot plan out the whole thing. People choose when to come. It is a very individual thing. The whole decision making that people make is actually quite complex. It is not that they see an advert and then take the decision immediately. It might stay in your mind for five years, and in five years’ time you take the decision. It is a much more complex decision making process. This idea that we do some marketing, and then tomorrow everybody turns up on our doorstep – that is not true.*
- “ Management and Marketing. The two have to go hand-in-hand. We have to have some plans for development, and we have to have some plans for promotion, and we have to have a commitment to what is sustainable.*
- “ We are a very entrepreneurial destination. We do not have big businesses with big investment pockets. This is the people who live on a farm and build a cottage at the end of the driveway. They may teach in the school during the day. This is not 50 room hotels. This is people running tours on their day off, or picking out a few weeks in the season when they could run tours. Or it is people who enjoy outdoor sport taking people out. It is people converting their places into tourist accommodation. It is very small scale.*
- “ I think for us, the communication of traditional culture and language is quite interesting. This is a distinct culture and way of life that we are trying to promote.*
- “ One of the things I think people miss out, which is the distinction between marketing and management, is that people often assume that tourism is bad for the traditions. That we somehow are killing the traditions. But, by creating economic opportunities, you are in some ways maintaining the traditions.*
- “ There is always this concerns “We want to keep things as they were” and “This is helping to undermine our tradition”. I do not buy into that. If we can highlight the culture and the heritage, and make it the reason people are visiting, it will create opportunities to protect it.*
- “ The National Organizations try and tell the stories of the remote rural locations. But, the visitors tend to stick to quite accessible urban locations. I sometimes joke that there should be a license fee for all of these great pictures from places to where you get a relatively small visitor numbers. Can we have a license fee for that picture?*
- “ I have a beach which is Scotland’s top beach. I do not make any money out of it. Yet Scotland does quite a lot money by sharing this beach around the world. Most people will not actually come to that beach, but that beach will trigger lots of visits to Scotland. The visitors will end up going to another beach.*
- “ So, I think there is quite a complex thing about that the rural and remote regions are often the things that trigger the decision to visit. Yet, the number of people who really make it there, given time constraints and accessibility, is relatively small.*
- “ We have a situation where the population is stable, but that is a result of young people leaving in their 20s, and lifestyle people are coming in at 50. We want to attract young people to start businesses. We want people to come in at 20 and 25. We want entrepreneurship.*
- “ I think we need to become better in telling the positive narratives about tourism and its Social Impact. There is so much about how dreadful it is, and how we are destroying environment and destroying traditional ways of life. We need to reverse it. I mean it is said tourism only creates low paid jobs in the seasons, and it creates all these commuter villages where people do not really live anymore. And there is this whole narrative of modern tourism is one of a destructive industry. I do not think the industry has been very good at getting hold of that.*
- “ To be telling a story that is making that narrative a positive one, where we bring people together to understand things. To give people opportunities to understand how the natural world works. There are lots of things here that give people all sorts of opportunities to create very flexible employment that fits in with their needs, childcare or other learning opportunities.*

- “ I think in these communities, how people feel about visitors has a huge impact on the experience that people have. So, we tend to talk about Destination Development and about the product at the big end. The thing visitors talk about is all the little stuff. It is the fact that the farmer left eggs on the doorstep of the cottage and they had fresh fried eggs. The fact that somebody stopped to give them a lift. It is just all these random experiences. It is the fact that the person in the shop asked them something, or they could go in and visit something. There is all sorts of things. And it is that community. They are my stakeholders. They are the people delivering the product. There is a huge variety around the world of people's attitude to that. And we have to keep that, because that is what people are coming for. That is just what people have to do. The visit around the museum and the boat trip is great, but it is about the person and the stories that the person tells on the boat trip at the heart of it.*
- “ We are trying to tell the story of the place. People want to hear your story. Do not tell them the story you think they want to hear, but tell them your own story based in your own identity.*
- “ One of the biggest challenges of destination work is that it does not work without some kind of public money going in. And one of the problems with that is that public money is under huge pressure.*
- “ Our projects are not built around something that we have just fabricated, but it is based in studies and interviews with the industry in our region as well as external business intelligence. What are the requests from the market? What do we need to improve to become a more attractive destination? Then we have built from that. That means that we are driven by external factors, but also very much focused on our businesses.*
- “ Even if we are talking about DMP and DMO and all of that, it is not really about reorganization, that is not the purpose. But, it is about achieving this target. In what way we do so does not really matter. The local communities need to start acting with another approach, and that is what we are facing. How will we get the local communities and the regional systems that today manage the tourism, to change how they work?*
- “ It is essential that we connect to all levels of how we manage our regions, instead of just building up something that is on the side. Because then, it is just as before that tourism is being considered, and has been so traditionally, very much as a separate part besides everything else within the regional planning. But tourism is really something that concerns everything and everyone, and that is what more people need to understand. It is not only about producing a nice leaflet or brochure, that was a long time ago. Today it is about to take it seriously, just as you have to take so many other things seriously.*
- “ We do not only want to create a new “system” of visitor management that runs parallel to the existing ordinary administrative or political systems. We would rather take more time and involve the administration and politicians so that the system and practices can be changed from within. We could of course be focusing on making a system for Visitor Management and our own plans, such as it is being done for National Parks. But, we are working with the communities and community development, and our aim is to involve more and change the understanding of Visitor Management into the existing system, administration and political agenda, to get the changes integrated and remain.*

1.2. Perspectives

Framework of a Destination Management Organization

The study research *A framework for rural tourism destination management and marketing organizations* presents the following framework of a DMMO (Destination Management and Marketing Organization) from the context of rural tourism.¹

The single arrows on the framework indicate the relationship between the main construct while the double way arrows influence and are influenced by other components. For example the destinations stakeholders influence both management and marketing roles of DMMO for mutual benefits to be derived through the formation of a local management and marketing organization. The stakeholders' participation, involvement and collaboration with DMMO for the success of rural destinations is indispensable.

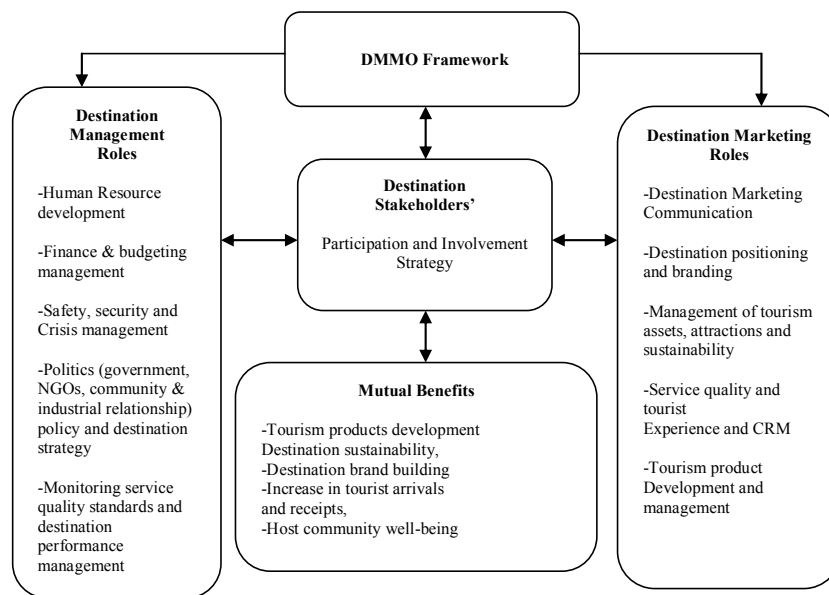


Figure: Example of Destination Management and Marketing Organization Framework

Financing of Destination Management

The tourism economy has numerous advantages for attracting investment to solve destination-related problems, including: 1) sustained growth; 2) motivated public and private actors who seek to solve destination management issues; and 3) substantial tax revenues that could be reallocated in order to improve destinations and thereby improve global and local business services and the well-being of local people simultaneously. Investing in value-added tourism is worthwhile because tourists have indicated a willingness to pay more for well-preserved assets and are likely to stay longer in regions that have carefully protected natural and social assets.²

The concept of PPP (Public-Private Partnership) has become a common initiative in promoting and marketing of tourism destinations. The main objective of PPP is to develop a strong and well-organized package of tourism products and services to improve the overall destination experience of tourists. To achieve the goal of engaging PPP in tourism destinations in relation to funding, the government's contribution to the initiate may be in form of capital investment, concessions or transfer of assets to support the partnership.³

From change to transformation

The founder of the Conscious Travel website and movement, Anna Pollock has said something like *"We do not need change, we need transformation. Just doing things differently is not enough. We need to shift our values. Our entire approach."*

Worldwide, there is a great deal of movement within the travel and hospitality sector. The digital revolution, the sharing economy and the huge growth in the number of travelers has led to significant changes in the sector. "But the operating system is not keeping up", says Anna Pollock. Growth is accelerating at a huge pace but this is having a major impact on the earth and local communities. Anna champions another type of 'better' tourism. This concerns a flourishing visitors economy that doesn't cost the earth, in any sense.⁴

The operating system for the tourism sector is rooted in the traditional, industrial model, according to Anna Pollock. Each trip consumes energy, water and raw materials for the transportation and accommodation of travelers; takes up space; generates waste and makes demands on the hospitality of local hosts. There also seems to be little evidence that the long-term consequences are being considered. Anna sees this as a characteristic of the post-war economic model. The industrial machine that emerged at that time focused on efficiency, price-led competition and volume growth. We can see this in the tourism sector too, says Anna, who blames this for the lack of a long-term vision.

Four transformational steps

Visit Flanders and the Flanders Department of Foreign Affairs launched a co-creative thinking process, together with various tourism partners and stakeholders, about the transformative power of tourism for the visitor, the resident, the entrepreneur and the destination. The results were published in the magazine 'Traveling to tomorrow'.⁵

In the article *Innovators are designing the future* four transformational steps are described.

1. Becoming aware
2. Taking responsibility
3. Collaboration
4. Connecting with places & with each other

These transformational steps could also be compared to the Destination Design method described as developing the destination to tell a good story.⁶ With addition of the four transformational step, it can be considered as what is needed in each step.

- | | |
|---------------------------------------|--|
| 1. Understanding: Preparing the story | (Becoming aware) |
| 2. Create: Build up the story | (Taking responsibility) |
| 3. Implement: Tell the story | (Collaboration) |
| 4. Bring to life: The story lives | (Connecting with places & with each other) |

Value creation

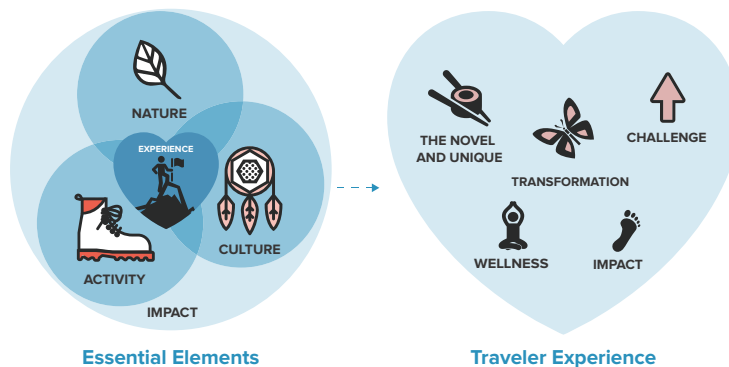
Depending on what kind of destination you are, one way to create value is to focus on Adventure Tourism.

Adventure tourism is attracting attention for its emphasis on rural areas, local culture, and because it can often be developed within existing infrastructure. Often, it's the presence of visitors that makes it a destination, rather than destinations seeking to create a tourism activity. However, even with these obvious benefits, there are certain conditions that must be present for market development.⁷

"Adventure tourism incorporates and promotes the values of the tourism that we want - a tourism that respects cultural and natural assets, and protects the most vulnerable." So says Taleb Rifai, former UNWTO Secretary General.⁸

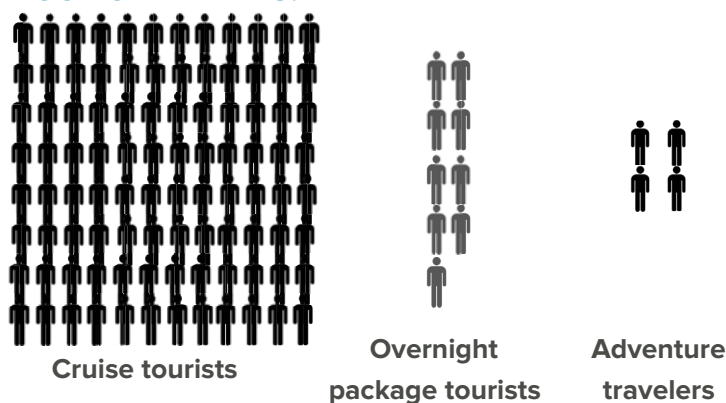
Following figures define Adventure tourism, and is comparing the market impact from adventure travelers to other types of tourists.⁹

ADVENTURE TRAVEL DEFINED



MARKET IMPACT

GENERATING US\$10,000 IN THE LOCAL ECONOMY TAKES:*



*based on World Bank (2015) Strengthening Tourism Competitiveness in the OECS countries: Market Analysis

MASS TOURISM

14%

of revenues remain in the country

1.5

local jobs per \$100,000 USD

ADVENTURE

65%

of revenues remain in the country

2.6

local jobs per \$100,000 USD

*based on USAID (2017) research study comparing mass tourism with adventure tourism in Jordan

A Flourishing Community

A flourishing community is very much connected to its specific place; where people work together, where visitors can feel at home and residents can nurture and share their love for the place.¹⁰

A community thrives when **the visitor**

- feels genuinely welcome
- can experience the essence of a place
- feels a positive impact of his stay; new energy and inspiration, personal development, commitment to the place and the people that he/she meets
- respects nature, culture and the characteristics of the place
- takes the people and place to his heart, feels involved and wants to return or recommend the place to others

A community thrives when **the entrepreneur / service provider**

- is vital and profitable and can adapt effectively to change
- has good working conditions and appreciation
- is passionate and innovative/creative in terms of his product or service and monitors its uniqueness
- is an ambassador for the place where he/she works
- strives for high levels of satisfaction by means of genuine hospitality and professionalism
- takes account of the impact of his activities on the other place keepers and the place itself
- makes a positive contribution to the health of the society/community/place in which the business is situated

A community thrives when **the place**

- is appealing, pleasant and safe
- encourages encounters between residents, entrepreneurs and visitors and does not exclude anyone
- showcases its unique character, and retains its identity, nature and culture
- offers space for creativity and experimenting
- draws upon the intellect of the local community
- connects to the rest of the world and makes a positive contribution to a flourishing planet

A community thrives when **a resident**

- loves living in the place, knows the place well and is proud of it
- is involved in the (tourism) policy of the place so that he/she supports the desired development of their place
- enjoys the positive impact of tourism: retention and strengthening of facilities, heritage, culture, income, jobs, intercultural encounters, ...
- is not inconvenienced by tourism

Sustainable Development

Tourism growth is only relevant, when it has a positive impact. This statement is made in the sustainability strategy that Copenhagen recently made - *Tourism for good*.¹¹

The key idea is that tourism is not a goal in itself; tourism is a means to a sustainable end – a reality where tourism contributes positively to society, to building better cities and destinations for locals and visitors alike and where tourism is a driver of positive change.

World Tourism Organization implies that a well-designed and managed tourism sector can help preserve the natural and cultural heritage assets upon which it depends, empower host communities, generate trade opportunities, and foster peace and intercultural understanding.¹²

Expressed simply, sustainable tourism can be defined as:

*“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”*¹³

Nevertheless, the growing number of people travelling internationally and domestically each year also poses growing challenges including those related to greenhouse gas emissions, economic leakages, resource management or impact on local communities and cultural assets. Therefore, the harnessing of tourism’s positive contribution to sustainable development and the mitigation of the sector’s potential adverse effects calls for strong partnerships and decisive action by all tourism stakeholders in line with the 2030 Agenda for Sustainable Development.

In 2015, world governments agreed on 17 Sustainable Development Goals (SDGs). Tourism can play a huge part in achieving the SDGs.¹⁴

Overtourism

Contrary to what most believe, it does not take crowds to generate an overtourism problem, says Milena Nikolova, specialized in tourism market trends and traveler behavior.¹⁵

In general, overtourism occurs when there is a disparity under one of three conditions:

1. Between the volume of tourism activity and the capacity of the host destination.
2. Between the type of tourism activity and local capacity.
3. Between traveler behavior and local social norms.

A disparity can occur with 20 people who are present at the same time in a fragile natural area that does not have the infrastructure to support the simultaneous presence of even a small number of visitors. It can occur with a steady flow of seemingly small groups of tourists who pass through a quiet, local street simply to capture it in a photo or the sudden, short-lived presence of significant crowds in an otherwise quiet, natural area.

Overtourism can occur when the style of a tourism activity does not match the nature of the local destination and its physical ability to sustain it without being damaged. For example, visiting a centuries-old town with a fragile infrastructure in a motorized vehicle instead of exploring by foot, or riding a motorboat through a biodiversity-rich delta instead of kayaking.

A disparity between traveler behavior and local social norms can also be classified as overtourism. This disparity does not always result from overcrowding.

1.3. Conclusions

Reflections

- DMOs can collaborate amongst themselves and focus on specific themes, for example Responsible Tourism and Sustainable Development. This can encourage and inspire the tourism industry to improve and reach goals.
- Strategies and plans of DMOs are preferably divided into long-term and short-term documents. The aim should be to streamline and to follow up on the progress continuously.
- Strategies and plans of DMOs should be connected to the overall Community Planning and Master Planning.
- Tourism should not be considered as an isolated sector, but must be managed as part of the whole community.
- Without Destination Management the impacts of tourism can have deleterious effects on cultural heritage and natural resources. Destination Management leads to desired impacts from tourism with positive effects for preservation and further development of cultural heritage and protection of natural resources.
- Communication and viability is of central importance for a DMO. Not only towards visitors, but towards the local community and companies. To communicate and create shared understanding of preconditions for development, common goals and visions.
- It is important for a DMO to communicate about the progress and results from the efforts being done. This must be communicated towards all the stakeholders; the local community/residents, the industry, the visitors and the regional and national authorities.
- The studied DMOs have in general a strong focus on Marketing. At the same time Marketing is being considered as one of the tools for Destination Management in order to attract the desired type of tourism, to communicate experiences and to spread tourism geographically and seasonally.
- DMOs are looking into new ways to measure and evaluate the performance. An emerging trend among many is to track more online which provides more accurate information and is more effective. One of the tools that is being used is the TSI - Tourism Sentiment Index that is automatically analyzing and index online conversations that are affecting perceptions of the destination.
- DMOs need to consider how they can be smarter, how the organization can be more effective, what costs can be cut and how tasks can be performed through new solutions.
- DMOs are more active in physical planning emphasizing both on the Visitor Experience, and on attractive community.
- Many of the studied DMOs focus on themes and have development programs running around those; as Food & Drink, Outdoor, Culture and more.
- There is a need to establish sustainable funding models for DMOs, and at the same time defining the actual role of a DMO.
- There is a need to attract the right competence within DMOs with understanding and ability to work with Destination Management.
- Destination Management and Development must become closer connected to the work within the local councils, who have the responsibility for the public role and the planning

Successful DMOs

- Successful DMOs have been able to streamline the implementing and following up of Development & Marketing Plans. They have been able to put up a system for Destination Management without making it too complex and time demanding, but where the energy and efforts are focusing more on action.
- Successful DMOs always ensure that all of their Marketing, Destination Development and Product Development is insight driven and evidence based, measured, evaluated and followed up.
- Successful DMOs have engaged, passionate and collaborative people working within their teams. The staff members are given responsibilities and trust, and they are motivated and inspired to bring out results. This is an important aspect considering the leadership of a DMO.
- Successful DMOs have clear development targets set up, that are transparent and effectively communicated both internally and externally.
- Successful DMOs have a good overview of all stakeholders and a good dialogue with them. Stakeholder maps are good, but they have to be used and processed.
- Successful DMOs have a strong participation from the private sector. Not only from the tourism industry, but also other sectors.
- Successful and sustainable DMOs are based on Public-Private Partnerships - PPP. The funding model is one of the mediums to establish PPP, but it is important to consider the value for everyone to last.
- Successful DMOs have been able to increase the collaboration between stakeholders in the development of the place.
- Successful DMOs are good in keeping up an ongoing dialogue and communicate with the stakeholders on continuous basis.
- Successful DMOs are visible and attendant.
- Successful DMOs join efforts to increase the experience for visitors throughout their whole journey.
- Successful DMOs have regular open meetings, systematically throughout the year. The stakeholders are invited to take part, to get information and to engage and exercise influence. Best practices are good at making the stakeholders feel shared ownership of the Destination Development.
- Successful DMOs follow statistics and estimates carefully, and take action to create more job opportunities. They focus on increasing the amount of Full Time Employees working in tourism all year around.
- Successful DMOs are good at focusing on one thing at the time without getting stuck in details.
- Successful DMOs are active in providing support and training, and encourage the local destinations and tourism industry to develop and improve.
- Successful DMOs are good at creating a strong brand and brand platform that leads the way for local destinations and companies to follow and be inspired.
- Successful DMOs celebrate success, and recognize and highlight best practices within the destination. These best practices encourage and inspire others to strengthen their brands, products and experiences and lead to innovation.
- Successful DMOs work from strategies that they hold on to. The long-term strategies are processed through annual Action Plans.
- Successful DMOs are managed in close contact with stakeholders on local, regional and national levels and in connection to the needs and
- Successful DMOs focus on creating a strong brand, on developing the destination and the products and on creating good experiences. Ultimately the focus must be on sales.
- Successful DMOs focus on value before volume.
- Successful DMOs focus on sustainability.

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Appendix 1: Survey



STUDY BY THE ICELANDIC TOURIST BOARD

Destination Management: Organization, Planning & Operation

This study will be finished during the spring 2019, and include answers from various international Destination Management Organizations.

When the study is finished and put together, we will send it to you who have participated.

The subject for the study is to gain insights and learnings, and to motivate, on working methods and organizing that contribute to Destination Development with a long-term and sustainable approach in connection to local, regional and national perspectives.

Thank you for your help in answering our questions.

Daniel Byström
Destination Management Consultant
Ferðamálastofa & Stjórnstöð Ferðamála
Icelandic Tourist Board & Tourism Task Force

Basic facts

1. Facts about your destination
 - Region and sub-regions / Areal / Population / Types of tourism

Organization

2. For how long has your organization worked with Destination Management, and how has your work within Destination Management changed over time?
 - Starting point / Stages / Life cycles / Continuation / More
3. How has your organization changed over time?
 - Composition / Approach / Different in different stages? / More
4. How is your DMO (Destination Management Organization) built up today?
 - How is the structure? / Can you provide a visual chart of your organization?
5. Who are represented on the board of your DMO?
6. Where is your DMO located?
 - More than one office? / Why located there? / How acting practical/political?
7. How is your organization financed?
 - Proportions between regional funding, member ship fees etc. / How many members? / Membership fee amount? / More

Destination Management Plan

8. Do you have a Destination Management Plan DMP, or other similar plan?
 - What are the main headlines? / How extensive is the plan? / How long time do you take to prepare the plan? / How often do you revise and follow up on your plan? / More
9. How do you implement your plan?
 - Action Plan / Distribution of work / Relation to legal planning / More

Destination Management

10. How do you distribute funding?
 - Geographically? / Depending on other factors? / Earmarked for specific purposes? / More
11. What focus do you have within your Destination Management?
 - Marketing / Data gathering / Research / Education / Product Development / Innovation / Infrastructure improvements / Other
12. How do you measure progress for your destination?
 - What kind of data do you measure? / Key Performance Indicators / How do you collect data? / How do you evaluate? / More
13. Who are your stakeholders and how are they involved?
 - Tourist industry / Businesses in other sectors / Residents / Local municipalities / Regional and national authorities / Other
14. How do you keep up the engagement among the stakeholders?
 - How do you give feedback? / How do you report development and progress? / How do you keep up the interest, momentum and energy? / More

Specific aims, challenges and focuses

15. What has been your specific aims, challenges and focuses in the past?
16. What are your specific aims, challenges and focuses now, and what can you see is coming?

Lessons learned

17. What would you list as main success factors, and what to emphasize on when building up a DMO?
18. What can be the pitfalls, and what should be avoided?

