UNWTO
World Tourism Organization

Survey on Destination Governance

Evaluation Report

DESTINATION MANAGEMENT PROGRAMME

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Prologue

One of the fundamental priorities of the UNWTO's Destination Management Programme is the continuous evaluation, systematic analysis and up-to-date information regarding the tourism governance at local, regional and national levels. The current research constitutes an integral part of this original commitment.

The ultimate goal of this programme is to help UNWTO members enhance destination performance by putting governance excellence systems into action. To this end, the present report provides a descriptive assessment of the current trends of destination management by examining how they affect the operational performance of different Destination Management Organizations (DMOs) across the globe. Particularly, it examines to what extent the existing managerial and operational structures are decentralized from the national administration's supervision and control and how they streamline some fundamental (DMOs) procedures and activities, such as planning, decision making, marketing, branding and funding.

An on-line survey was carried out with a selected number of (DMOs) from all continents. Although it was highly desirable to have a balanced geographical distribution from all the regions, unfortunately the participation of (DMOs) from Africa, Asia and the Pacific was extremely low. The total response rate has reached approximately 37% of the recipients. The majority of them were from North America and Europe while the few remaining of the sample came from South and Central America, and the Middle East.

The present document provides information regarding the main partners, the activities and responsibilities of (DMOs), state-of-the-art trends of destination management, the roles and synergies of the private stakeholders and the evaluation of the operational performance of different types of organization. By analyzing the upcoming challenges, this report summarizes some handy suggestions that may advance the performance of (DMOs) at any level and highlights the indicative positive outcomes derived from the application of specific forms of destination governance.

- **Tourism Destination** is a physical space in which a tourist spends at least one overnight and could be at any scale, from a whole country, to a region or island, to a town or city to a self-contained center.[1] A Tourism Destination includes all the tourism services, resources, amenities, attractions, facilities and support services/products offered to visitors within their period of stay.

- **Destination Management Organization (DMO)** is the entity, which brings together various authorities, stakeholders and professionals and/or facilitates tourism industry partnerships towards a collective destination vision. The ultimate goal of a (DMO) is to develop and promote the destination by coordinating and managing certain key activities, such as funding, strategic planning, marketing, decision making and product development of the destination.[1]

- **Destination Governance** is the process through which each (DMO) acts and performs. It defines the operational activities, the expectations, the priorities and the goals of an organization. '*Destination Governance'* relates to the development and implementation of a cohesive policy, a consistent management system, and an effective decision making of a (DMO).[1]

- **Convention Bureau (CVB)** is a specific form of destination governance at local or regional level. It is a type of organization with a distinct structure and role, typically for urban destinations but also common for rural, coastal and mountain areas. Convention bureau is the entity responsible for promoting and organizing conferences, exhibitions, conventions, incentives and various events at the destination. It could be a non profit private-public partnership, a company funded by the private sector, a department of public authority or even a private sector trading.

To avoid any possible confusion, in this survey, the term 'convention bureau' refers to:

- a particular form of governance, since some (DMOs) have selected this term to describe their status and role and;
- in many cases a (CVB) is a partner or a stakeholder of an entity with broader priorities, like a chamber of commerce and a municipal or a provincial government.

[1] *UNWTO 2007- 'A Practical Guide to Tourism Destination Management'.*

A general conclusion from the survey is that there is a tendency for the destination management organization to be more customer-oriented by delivering excellent value to visitors.

The successful model of the public/private partnerships has been increasingly used by many (DMOs) as a useful tool to ensure the efficiency of governance and upgrade the operational performance of the organization.

It seems though that the participation of the private sector in planning, decision making and marketing processes is higher for the entities at local level, particularly (CVBs), urban and coastal destinations.

The main priority of the national tourism boards and the regional tourism development organizations is to improve tourism yield by focusing on specific source markets or segments that eventually will lead to reduce seasonality, expand the average length of stay and increase per capita visitor expenditure.

On the other hand, urban and mature coastal destinations are more preoccupied in building a competitive edge for their destination, either by establishing a strong and unique positioning or by providing quality experiences and high 'value for money' services to visitors.

Finally, most of the rural, mountain, insular and small state areas are struggling to build a strong and appealing brand identity while investing money and time to develop sustainable products and services, so as to maintain the local environmental integrity and the quality of their natural resources.

However, the path to destination management excellence is not an easy one and each organization has a number of specific problems to confront in the near future. According to the responses received, it appears that the major challenges for the majority of urban, rural and coastal destinations are:

- Sustain funding sources,
- Increase the level of decentralization and independence from the national administration,
- Harness the IT advancements, particularly Internet and use 'innovation' for the promotion, positioning and marketing of the destination, customer relationship management and product development quality,
- Design sustainable products/services, and
- Attract the 'big spenders'.

On the other hand, most of the national tourism boards and regional tourism development agencies are considered (or concerned?) more for (with?):

- Reform the national legislation for tourism,
- Building up or reinvent their brand identity,
- Upgrade the human resources, and
- Minimize bureaucracy in planning, decision making and marketing.

1. The Rationale for Studying Destination Governance

It is generally agreed that destination management is a vital process which allows destinations to maximize tourism value for visitors while ensuring local benefits and sustainability.[1] Effective destination management leads to successful operational performance and helps destination to build a strong competitive identity, to develop sustainable tourism, to improve tourism yield and to increase the benefits for host communities. [1] It has also been suggested that the higher the complexity of the management structure is, the lower the functionality and the poorer the performance of the organization.

However, there is a lack of knowledge about the impact of different forms of governance on the operational performance and the organizational structure of a DMO .

The present research sheds light to all the above, by examining the current forms of destination governance and providing a benchmark analysis on the overall performance of several (DMOs) worldwide. Apart from some general data related to the size, the role and the main responsibilities of the DMO, the emphasis is put on the type and the volume of involvement of the stakeholders, on management schemes and on operational activities, which are considered as key elements for ensuring destination competitiveness.

2. Research Method

The analytical approach of this study is a combination of qualitative and quantitative research. The methodological tool used was a survey questionnaire with structured, semi-structured and open-ended questions. The questionnaire was produced in three languages, namely English, French and Spanish.

The list of recipients was drawn up by using the database of the UNWTO's Destination Council, the personal contacts of the coordinator of the Destination Management programme and by conducting an extensive and systematic on-line search for the contact details of additional organizations. The final list was drawn up of UNWTO members and non- members as well as convention bureaus, regional development agencies and city tourism boards in Europe and U.S.A.

Initially, an e-mail, including a cover letter and a word version of the questionnaire, was sent to the contact person of each DMO, usually the CEO, director or executive officer, inviting them to participate in the survey. An extra option for completing the questionnaire by one-click to a specific URL address was also available. Additionally, a fax number was also provided for those who preferred to send a hard copy of their answer.

From a total of 687 (DMOs) approached, 15,4% replied according to the following breakdown:

Europe	**26**
Americas	**52**[3]
Africa	**2**
Middle East	**2**
East Asia & the Pacific	**2**
South Asia	**3**

The follow-up procedure consisted of a reminder e-mail, forwarded at least twice to the initial recipients. Additionally, telephone calls were pursued to several personal contacts, encouraging them to complete the questionnaire.

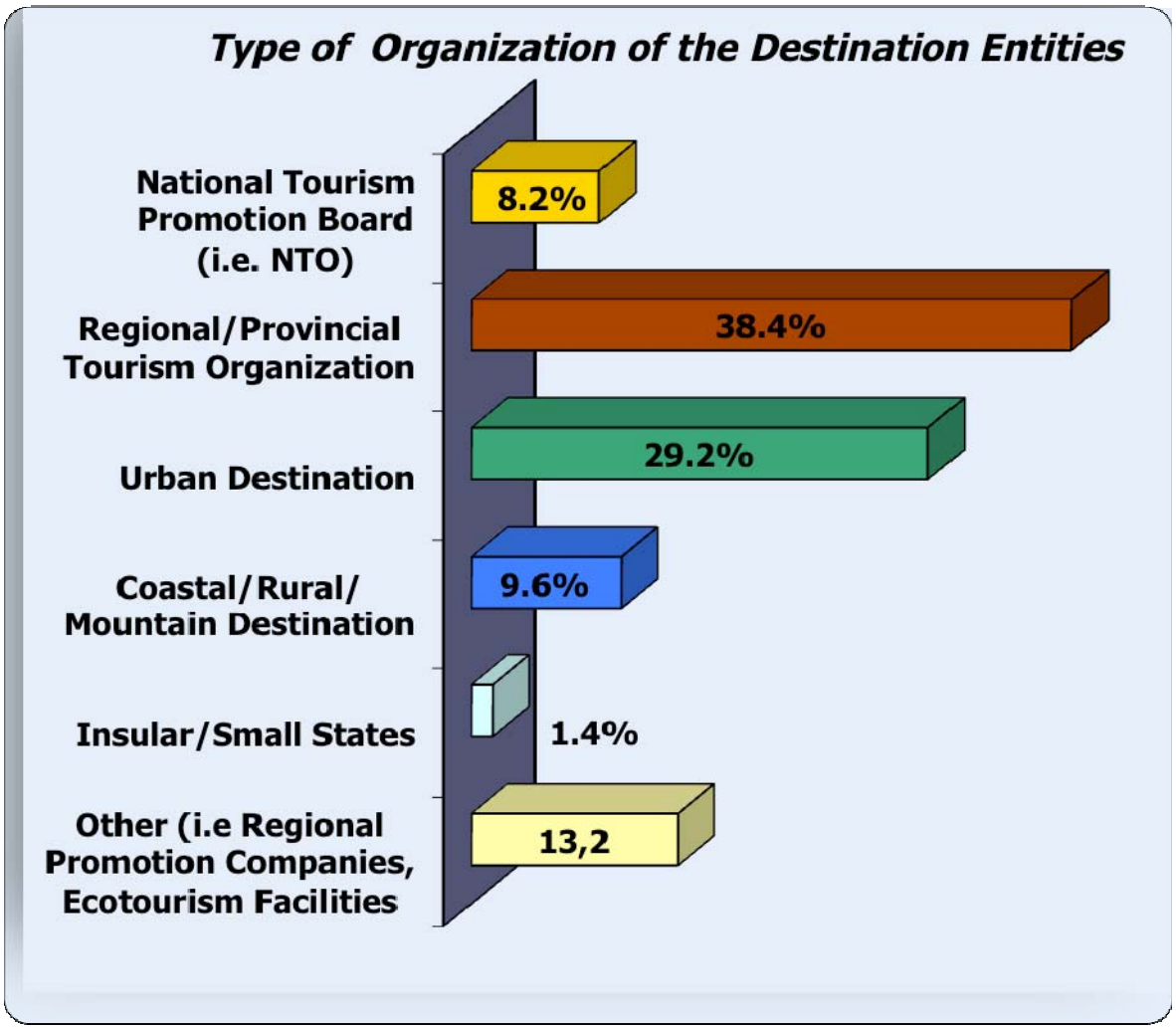
[3] It should be noted that 44 of them were from North America, mainly (CVBs) from the U.S.A.

3. Types of Destination Management Organizations (DMOs)

By using a standard typology, the (DMOs) were asked to best describe the nature and the role of their organization. As it can be seen in graph (1), 38,4% of the organizations that replied to this survey are regional/provincial and 29,2% urban destinations. The (DMOs) from coastal, rural and mountain areas represent 9,6% of the sample, whereas 8,2% of the organizations are national tourism promotion boards. A significant proportion (13,2%) of the (DMOs) have chosen the 'Other' option, which principally refers to :

1. Regional Tourism Bodies or Promotion Companies and
2. Cultural or Eco-Tourism facilities/attractions.

Graph 1



4. Financial and Administrative information

It is fairly certain, that the financial capacity and the human resources are essential factors for the implementation of strategic goals and the effectiveness of destination governance. *According to the respondents,* the type of the organization plays an important role in expenditure patterns. Generally, despite the difficult international climate due to the ongoing financial downturn, most of the (DMOs) have managed to sustain their budget allocation to a relatively moderate level, fluctuating mainly from US$ 1 to US$10 million.

As shown in table (1), the majority of the regional tourism boards, together with many coastal, rural, mountain and urban destinations have allocated $1 to $ 5 millions for 2009, including staff fees and overheads. The scale of responsibilities and the tasks for the national tourism boards are quite different from other (DMOs) and their budget exceeds the $15 millions in most of the cases. By the same token but for different reasons, many (DMOs) in insular and small states have rather limited spending capacity, which is up to US$500,000 for 2009. Likewise, the budget of city tourism boards was quite tight last year, with most of them being attributed no more than US$1 million in overall expenditures.

Table 1

Budget allocation for 2009

	National Tourism Boards %	Regional provincial Organizations %	Urban %	Coastal Rural Mountain %	Insular Small states %
Up to US$500.000			20	15	33
US $ 500.001 – 750.000		4	12		9
US $750.001 – 1m		7	17	10	13
US $1 - 1.5 m		32	14	29	12
US $1.5 - 5 m	4	47	24	33	19
US $ 5- 10 m	9	5	7	8	14
US$ 10- 15 m	22	3	4	4	
More than US$ 15 m	65	2	2	1	
TOTAL	*(100%)*	*(100%)*	*(100%)*	*(100%)*	*(100%)*

Obviously, budget is a crucial element for the quality of human resources and the number of the people employed by each DMO. By combining the data from table (1) and (2) we may conclude that there is a tendency for the majority of urban, coastal, rural and mountain destinations with relatively moderate budget, to be more flexible in hiring experts or administrative staff for a short period of time.

There is also a strong indication that many of the (DMOs) in small state destinations and islands outsource to independent tourism experts the implementation of several tasks, such as training seminars or workshops for the local tourism professionals.

Subcontracting tourism consultant agencies is a common tactic for mature urban destinations in Europe and in the U.S.A, particularly for those with relatively higher budgets, in order to monitor domestic market, develop a marketing plan, establish a new competitive identity or design tailored-made products and services for the visitors.

On the other hand, many of the national tourism boards outsource their annual marketing campaigns to private advertisement companies and in some cases hire free lancers to deliver on a specific task such as creating a new logo, imagery or a slogan for the destination.

It is clear from table (2) that the vast majority of the staff in all types of (DMOs) have permanent posts. This increases the effectiveness of the operational performance of the (DMOs) and ensures the successful implementation of long term goals and strategies.

However, the number of people on a permanent contract is significantly higher in regional, provincial organizations and national tourism boards. By contrast, the percentage of temporary staff is extremely low in these entities basically due to very strict national regulations regarding the nomination of the employees at the public sector and the status of external collaborators. Subsequently, it seems that urban, coastal, rural and mountain destinations are more flexible in hiring people on a temporary basis.

Yet, it is the type of management structure that allows these (DMOs) to decide about the status and the number of their personnel in a simple and easy manner. Finally, it should be underlined that it is rather difficult for the regional organizations to contract experts or consultants since only the national administration is responsible for taking decisions on such issues.

Table 2

Staff categry per type of destination management

Staff	National Tourism Boards %	Regional provincial Organiza-tions %	Urban %	Coastal Rural Mountain %	Insular Small states %
Permanent	92,3	98,7	72,4	78,1	84,5
Temporary	0,8	1,3	15,3	11,8	4,3
Consultants/experts	6,9	0	12,3	10,1	11,2
TOTAL	*(100%)*	*(100%)*	*(100%)*	*(100%)*	*(100%)*

Lodging performance is a crucial indicator for the overall performance of a destination and simply put, low occupancy rates mean low tourism flows. A major challenge for the (DMOs) at any level, is to coordinate the management of all the elements of the tourism area in a way that increases the number of visitors and extend their length of stay.

From the table (3) it may be concluded that the accommodation performance was relatively weak for the period of 2008-2009 for the majority of the destinations. It should be noted though that the moderate strain on occupancy rates was closely related and greatly affected by the global economic crisis.

However, it is evident that some types of destinations responded better to the financial downturn.

It appears that several urban destinations were more resilient and by focusing basically on the domestic market had managed to keep the level of occupancy high. Particularly several urban entities like the (CVBs) in the U.S.A, in order to stimulate tourism demand have taken actions in collaboration with the local tourism professionals and stakeholders to design economic tour packages for specific segments or markets such as business tourism, conferences and visiting friends and relatives.

On the contrary the accommodation sector in many (DMOs) at regional and national levels was highly exposed to the downturn. According to many regional organizations the occupancy rates in their area were significantly low with the vast majority of them to range between 50-60%. Apart from the impact of the financial downturn, another major obstacle for the accommodation sector in many small states and islands was seasonality. The occupancy rates dropped drastically, particularly for the destinations which are far from the domestic metropolitan centers or with no direct connection with major international source markets.

Table 3

Occupancy rates per type of (DMO) in 2008-2009[4]

Occupancy Rates	National Tourism Boards %	Regional provincial Organizations %	Urban %	Coastal Rural Mountain %	Insular Small states %
0-25%				1	3
25-50%	5	12		8	10
50-60%	28	68	11	52	71
60-70%	61	20	34	29	12
70-80%	4		33	6	4
80-90%	2		15	4	
90-100%			7		
TOTAL	*(100%)*	*(100%)*	*(100%)*	*(100%)*	*(100%)*

[4] The occupancy rates are approximate; they have been estimated, according to the data on overnight stays and accommodation capacity provided by each (DMO).

5. Current Trends in Destination Governance

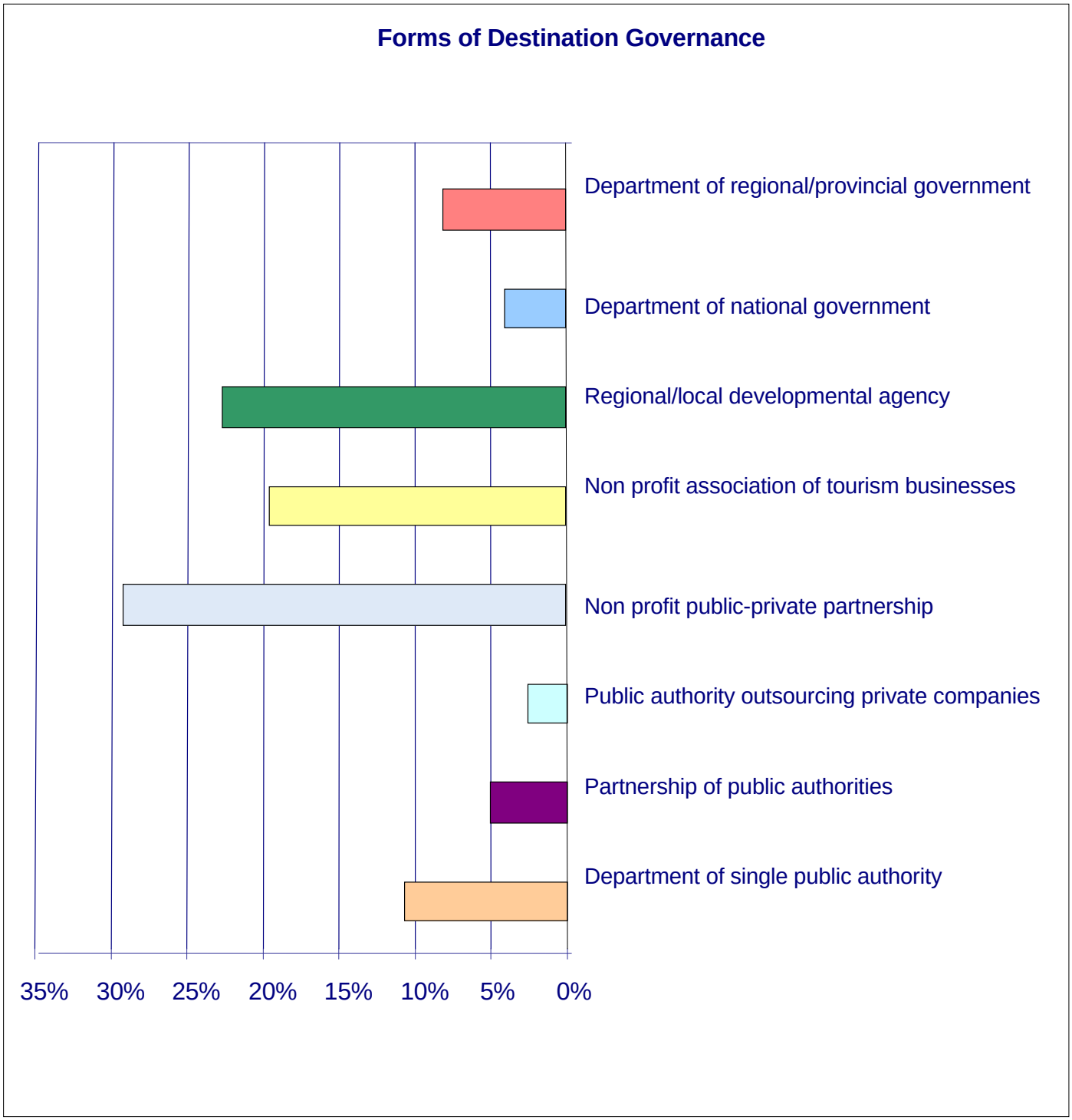
It seems that destination governance has shifted rapidly from a traditional public-oriented model to a more corporate one. There is a clear indication that public/private partnerships (PPPs) play a leading role for destination management in the majority of the organizations participated in this survey.

According to graph (2), almost 30% of the (DMOs) are non- profit associations of tourism businesses and around 40% are regional/provincial development agencies and non-profit public/private partnerships. The involvement of private sector in all of these three particular forms of governance is vital and it further suggests that the main priority for the (DMOs) is to develop and sustain partnerships on many different levels, either between tourism market clusters and government agencies or across different sectors such as local stakeholders, educational groups and tourism business liaisons. It should be noted though that most of the above (DMOs) are Convention Bureaus (CVBs) in North America, where government interventionism is relatively low and the economy embraces the private enterprise and encourages inter-sectoral partnerships.

Similarly, the management structure of the majority of the European (DMOs) has been built upon non profit collaborations and public/private partnerships (PPP's). The entities of around 85% of European urban destinations and regional organizations are based on non profit partnerships between tourism consortia and public authorities. Almost 30% of the European (DMOs) are local development agencies, 8,2% are parastatal development companies and only 5,1% are partnerships of public authorities. Apparently, there are few tourism areas whose governance is coordinated by a department of national government or a single public authority. A general conclusion is that destination governance tends to be more effective and functional. Increasingly, the ultimate objective for the majority of (DMOs) is to create synergies among the tourism professionals and build collaborations between the private stakeholders and the local authorities.

This tendency leads to a high level of autonomy for the majority of (DMOs) (75,3%). The management and operational performance in approximately 75% of (DMOs) are quite decentralized from the national administration. Subsequently, the organizational structure of around 70% of regional/provincial development agencies provides them with a significantly high level of autonomy in decision making and planning.

Graph 2


Forms of Destination Governance
Department of regional/provincial government
Department of national government
Regional/local developmental agency
Non profit association of tourism businesses
Non profit public-private partnership
Public authority outsourcing private companies
Partnership of public authorities
Department of single public authority
35%
30%
25%
20%
15%
10%
5%
0%

The number and the type of the stakeholders are key elements for the operational and organizational performance of a DMO. Additionally the level of coordination and cooperation among the main stakeholders is a keystone for the implementation of a coherent plan and an effective operation of destination management.

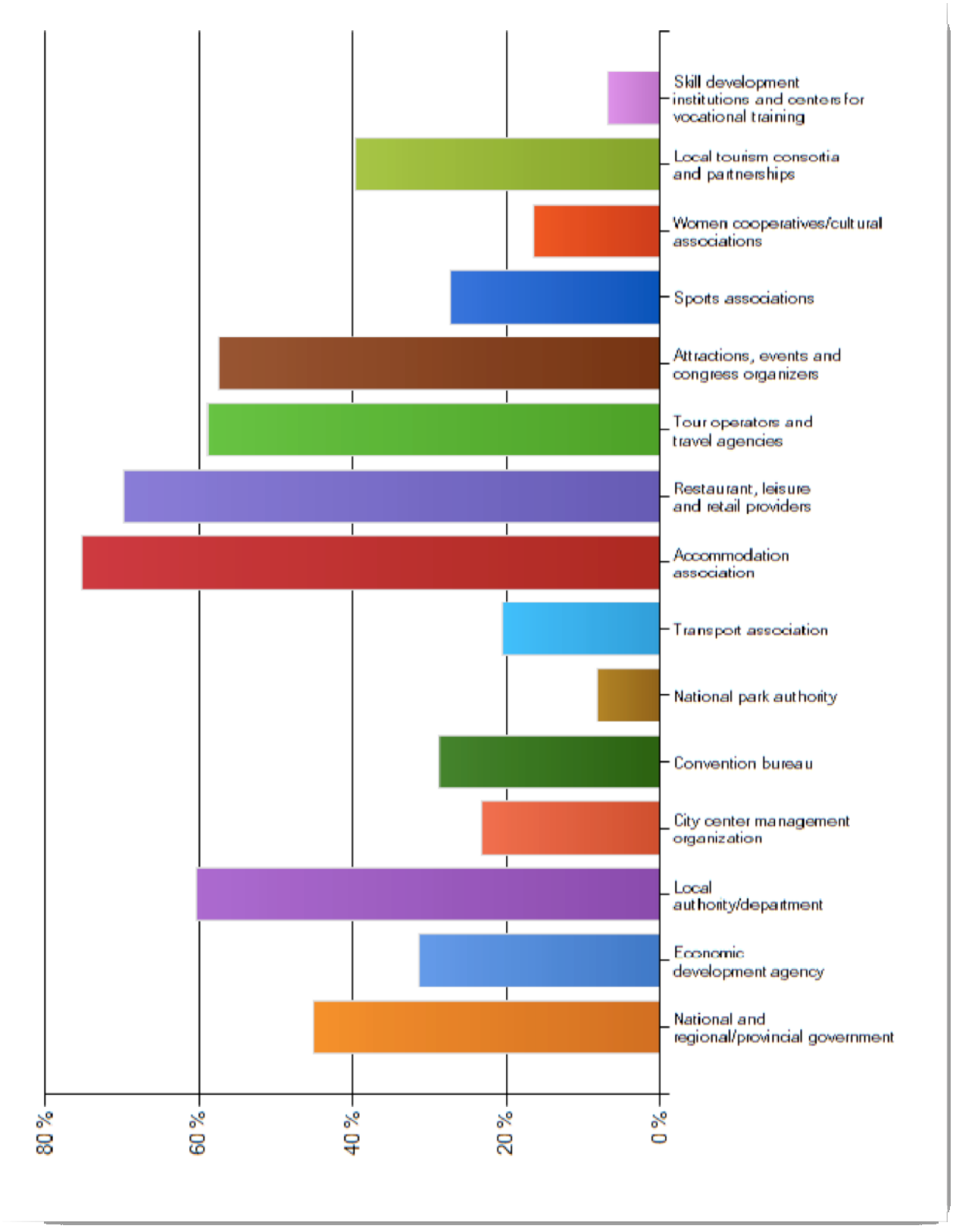
From the graph (3), it can be inferred that the tourism industry is highly represented in the majority of the (DMOs). Accommodation associations, restaurants, tour operators, travel agencies, attractions/special events organizers and sport unions are the basic stakeholders in almost 90% of coastal, rural and mountain areas; they represent 80% in urban destinations and around 70% in re gional tourism organizations. On the contrary, transport associations accounted extremely low as partners in the vast majority of insular and small states and relatively low in many urban destinations.

There is also a clear indication of the dynamic involvement of the local stakeholders in destination management. It is estimated that local tourism consortia represent some 60% of the basic partners for urban areas and regional tourism organiza tions and almost 80% of the stakeholders in coastal, rural and mountain destinations. Additionally, the local authorities, (CVBs) and the national/regional governments are identified as the basic partners in 60,3% of the (DMOs), whereas in some cases chambers of commerce and economic development agencies participated in the organizational structure of the (DMOs) mainly during their initial phase of operation.

Vocational training centers, women cooperatives and national parks are the less frequent partners of the (DMOs). It should be mentioned though, that in a few urban destinations and regional tourism organizations some of the basic partners have a distinct function or role (e.g. agrotourism companies, film and video producers, international alliance of convention centers, etc).

Graph 3

Main stakeholders and basic partners of the (DMOs)

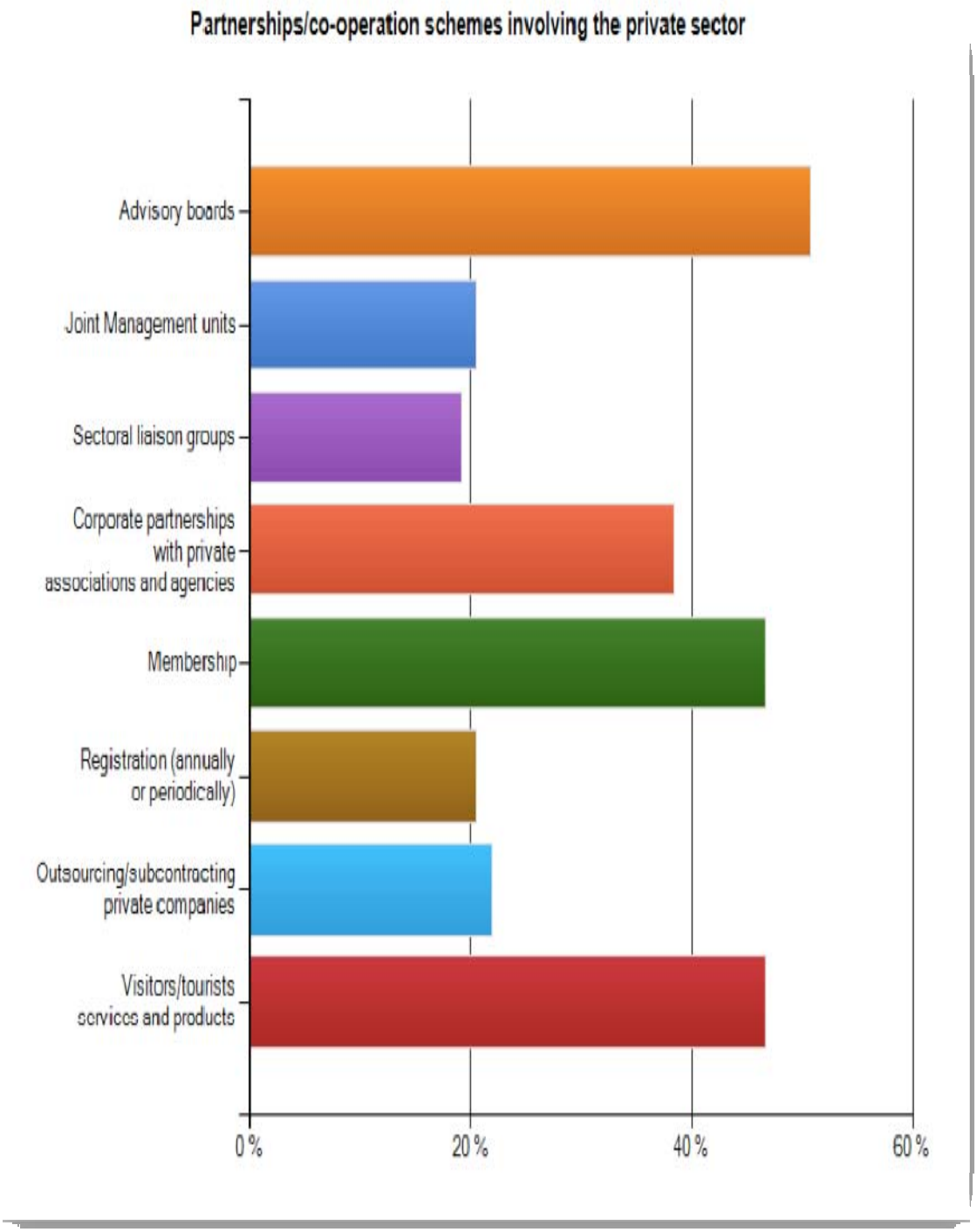


5.1. The Role of the Private Sector in Destination Governance

It is generally agreed that the involvement of private sector in destination management, particularly in strategic planning and decision making, is a fundamental requirement for good governance and there are several forms through which private stakeholders may contribute to the operational efficiency and performance of a DMO.

The respondents were asked to indicate the types of partnerships and co-operation schemes in which the private sector has been involved. The participation of the private stakeholders in the advisory boards of 50,7% of (CVBs) and in the joint management units of 30,5% (DMOs) in urban destinations reflect that the tourism industry is significantly involved in decision making. Furthermore, it seems that the level of collaboration with the private sector is considerably strong for many (DMOs) in urban and coastal areas, with 38,4% of them establishing corporate partnerships, 19,2% setting up sectoral liaison groups and 21,9% outsourcing or subcontracting private companies for the execution of multiple tasks. Furthermore, membership schemes and periodical registration served as a platform for the private sector to get involved in the operational processes of 46,6% and 20,5% of (CVBs) respectively. Finally, the tendency of the private sector to provide qualitative tourism services and integrated products indicates that the ultimate objective of the governance in almost 52% of urban destinations is visitors' satisfaction. (see graph 4).

Graph 4


Partnerships/co-operation schemes involving the private sector
Advisory boards
Joint Management units
Sectoral liaison groups
Corporate partnerships with private associations and agencies
Membership
Registration (annually or periodically)
Outsourcing/subcontracting private companies
Visitors/tourists services and products
0 %
20 %
40 %
60 %

Specifically, the level of involvement and collaboration of the private sector was measured with regards to five key areas of operation, namely:

- Strategic planning
- Product development
- Positioning, branding and marketing
- Funding
- Monitoring and follow up

As indicated in graph (5), the tourism industry participates significantly in the strategic planning and tourism product development in almost 40% of the destinations.

The involvement of tourism stakeholders is particularly high in 80% of the regional tourism organizations and high in 73% of urban destinations. Furthermore, it is evident that the local tourism industry collaborates strongly with the vast majority of (DMOs) at urban and coastal destinations for 'tourism products and services start-ups'. On the contrary the participation of local stakeholders in decision making and planning processes is quite low, particularly in recently established regional tourism promotion companies.

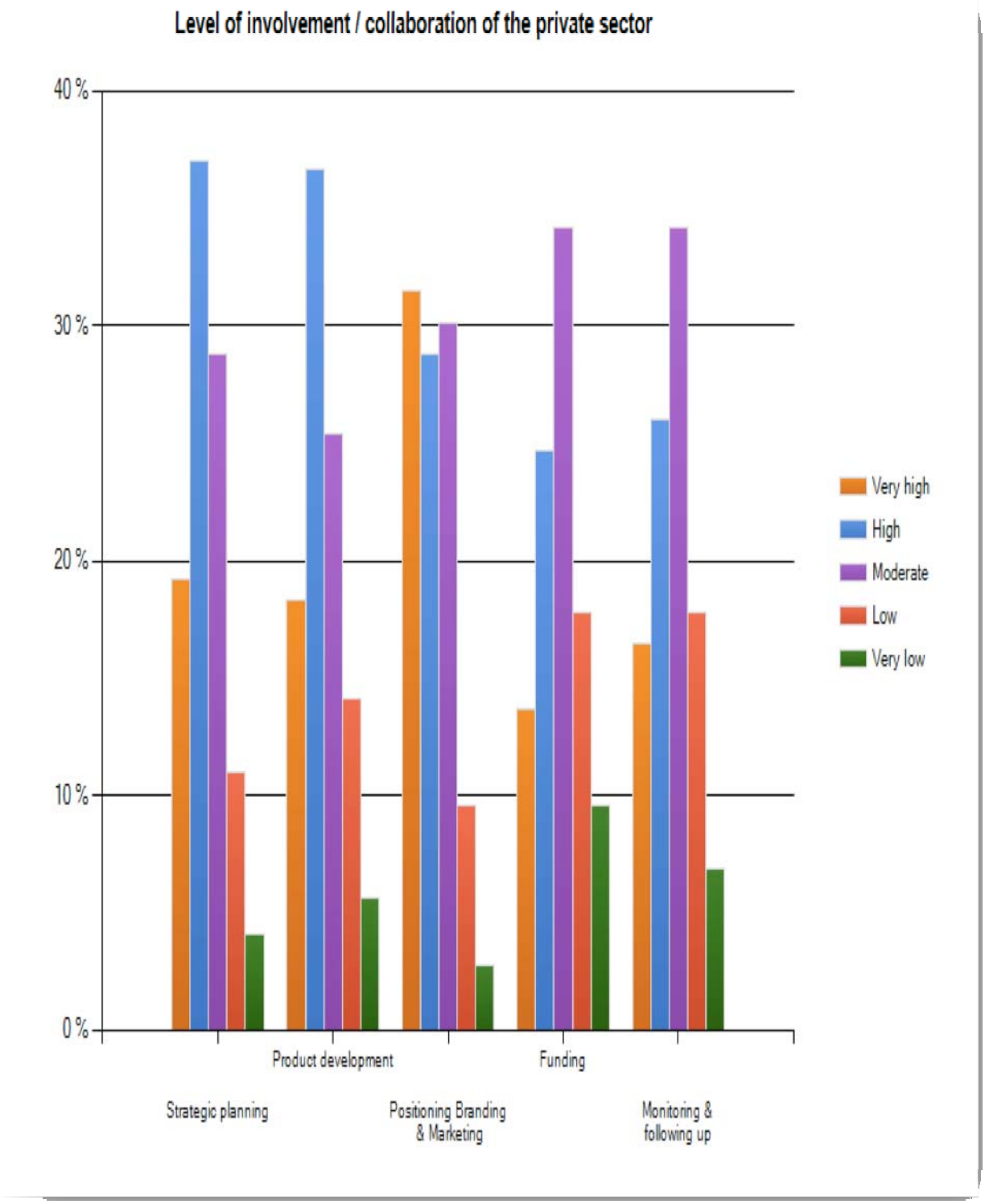
Subsequently, it seems that the collaboration of the private sector in marketing, positioning and branding is relatively high for the majority of the (DMOs). Some regional, coastal and several urban (DMOs) in collaboration with the accommodation and transportation industry have taken joint marketing activities for launching sustainable tourism products and services, primarily targeted to the domestic market. Many of the national tourism promotion boards and most of the major urban destinations are working closely with the tourism industry in marketing campaigns and co-promotional activities.

In many cases, a significant amount of the financial resources of the organizations are generated by the private sector. It is estimated that more than 40% of the budget in many (CVBs) and urban and coastal destinations come from private stakeholders.

Also, the local tourism industry has contributed 20% of the annual funds in several provincial promotional tourism companies. On the contrary, most of the regional tourism boards are depending on government funding.

It is clear that the overall involvement of private stakeholders in monitoring the implementation process of various activities and actions of the (DMOs) is moderate. However, almost 90% of urban destinations and 95% of national tourism promotion boards believe that the participation of the private sector in the follow up processes of their organization varies from high to very high. On the contrary, around 70% of the (CVBs) claim that tourism professionals and local stakeholders are not interested much in the evaluation of current actions.

Graph 5


Level of involvement / collaboration of the private sector
40 %
30 %
20 %
10 %
0 %
Very high
High
Moderate
Low
Very low
Strategic planning
Product development
Positioning Branding & Marketing
Funding
Monitoring & following up

5.2. Benefits and Disadvantages of Different Forms of Governance

It seems that the effectiveness of the current managing and operating processes is quite high for the majority of the (DMOs). According to the opinions of the directors and/or executive managers of several organizations, the benefits from the applied governance structures outweigh the disadvantages. This could only be an encouraging message for the future of the organizations signaling that their efforts to promote and develop the destination have an increasing corporate orientation.

Benefits

It should be underpinned that each form of destination governance offers different benefits for the (DMOs). Three of the immediate advantages of the management structures of the (CVBs) are the following:

1. Capacity to keep pace with emerging tourism trends
2. Resilience in planning and product development
3. Agility in decision making

Those benefits are basically the result of the simple operational system and the extensive participation of the local stakeholders in the management processes of the organization. It is also clear that the higher the level of decentralization from the national administration, the higher the effectiveness of planning, marketing, decision making and management. At least that is the case for most of the (CVBs), industry associations and public-private partnerships in urban destinations and many coastal areas, particularly in the mature ones. An important advantage of the organizational structure of many regional tourism boards in Europe is the relatively low operational costs since their budget does not include permanent staff payments, which are covered directly by national government funds.

Subsequently, the form of governance in many public-private partnerships and local development agencies in coastal, rural and mountain destinations have boosted local economies by helping tourism businesses, particularly the SMME's to promote their services and enhance their human resources. Moreover, many municipal and provincial governments claim that the type of their management structure has fostered the participation of local community to the decision making processes and furthermore increased the synergies with local tourism professionals. The collaboration with the tourism industry associations and the implementation of collective marketing activities are the direct outcomes of the form of governance of several public authorities outsourcing delivery to private companies in major urban destinations. In addition, the management structure of some urban destinations and (CVBs) has given them the privilege to upgrade their communication and information

system and design marketing campaigns for special segments and finally, the main benefits of the governance structure of the majority of single public authorities, partnerships of public agencies and national tourism promotion boards are the following:

- Development of long term strategies
- Capacity to oversight and implement multiple goals
- Build strong partnerships with the private sector
- Create a generic institutional framework for tourism development.

Disadvantages

According to the respondents the political leverage is a major obstacle for the decision making, marketing, and funding for many national tourism boards, single and corporate public authorities and several regional development agencies. Additionally, a major drawback for the majority of the single public authorities and nonprofit public-private partnerships is the high level of bureaucracy and the complexity of the organizational structure. The basic shortcomings of the management system of many municipal governments and regional tourism promotion companies in Europe are:

- Low level of effectiveness and poor functionality
- Lack of flexibility and difficulty in delivering multiple tasks
- Time consuming procedures for tendering
- Inadaptability of the national legislation to current needs of tourism sector

niche markets.

One of the basic problems for many CVBs in the U.S.A is the insufficient funding, which further creates a climate of instability and harbour doubts about the realization of medium and long term goals. As a result, decision making becomes sometimes complicated for many (CVBs) and to reach a consensus, especially on financial issues is rather difficult because some of the partners have contradictory interests and opinions. Apparently, the high dependence on the financial contributions of the private sector has increased the pressure on the members of the board of the (CVBs) to promote services and initiatives which overlook environmental, social and cultural impacts and focus only on economic profits for the destination. Particularly, for those entities which operate within chambers of commerce, the disputes or disagreements between rival political forces often lead to an ineffective decision making and serious delays in implementation of certain actions.

Finally, the relatively low awareness of local professionals regarding sustainable tourism and their limited information about the emerging trends and new tourism markets are major barriers for the development agencies and the municipal governments of less developed mountain, rural and insular areas. The lack of know-how, the limited human resources and the overlapping of the operational duties and responsibilities are the shortcomings for many regional public authorities in Europe and the (CVBs) in major urban destinations in the U.S.A.

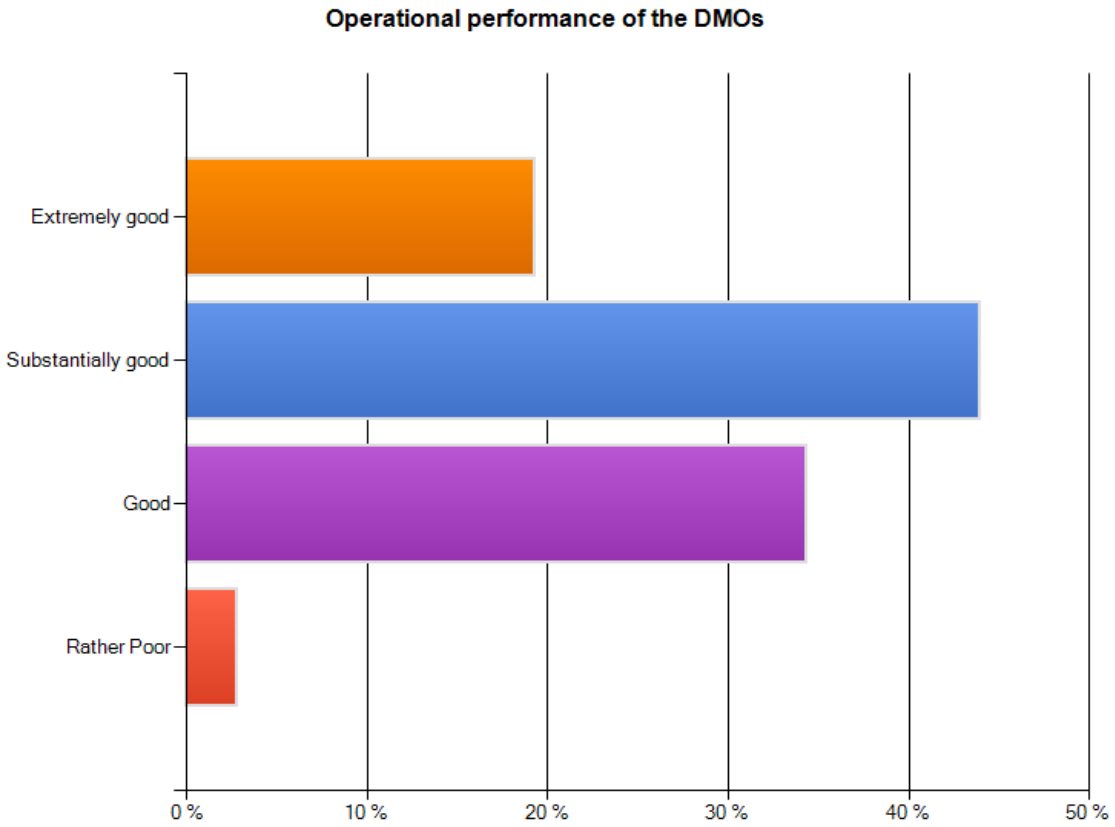
6. Evaluating the Operational Performance of the (DMOs)

One of the primary objectives of this survey is to analyze the performance of different types of (DMOs). In order to do this the representatives of the (DMOs) were asked to evaluate the functionality and the effectiveness of their organization.

According to the views of the senior managers (graph 6), most of the (DMOs) have successfully met their goals and expectations. Particularly, 43,8% of urban destinations and 37,7% of regional tourism offices described the performance of their organizations as 'substantially good'.

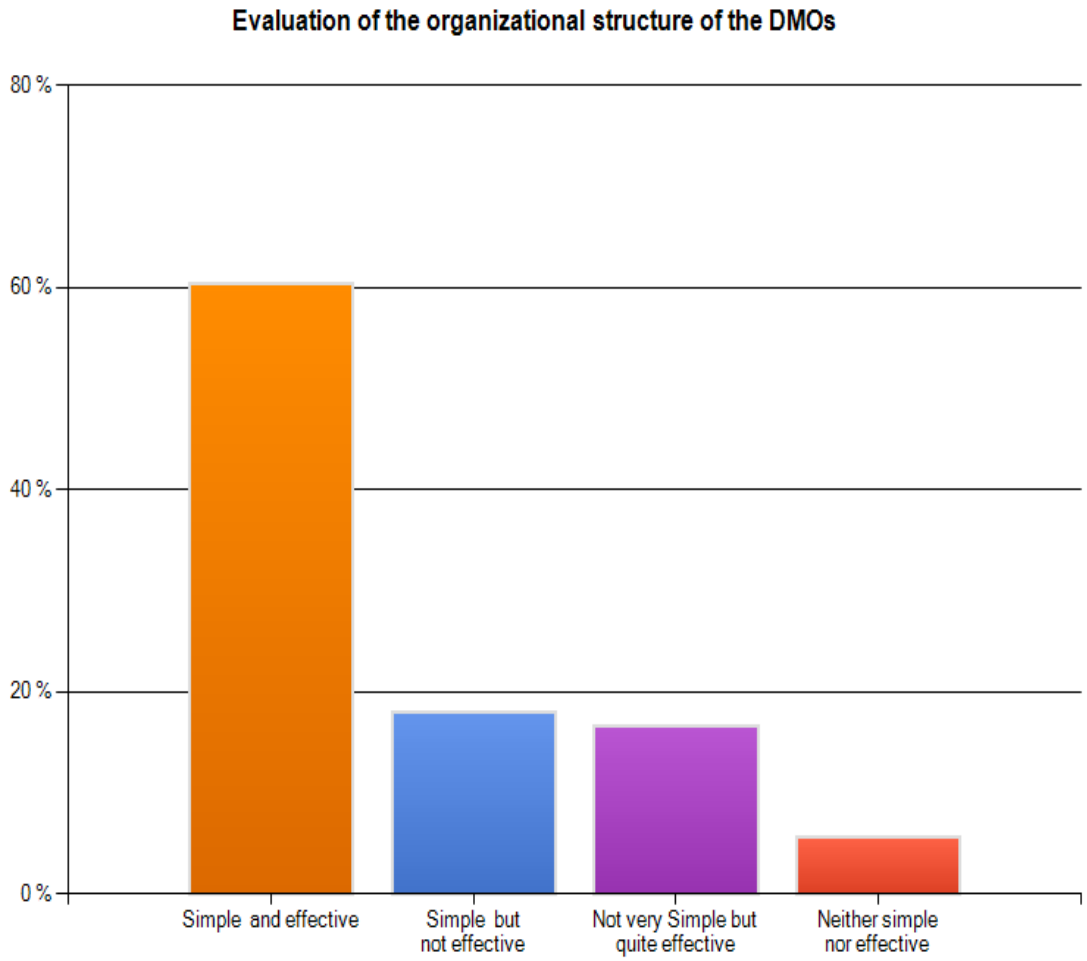
Accordingly, 34,2% of coastal destinations and 78,6% of insular/small state believe that their organizational structure is extremely effective. Finally, 92,3% of the national tourism promotion boards are satisfied with the functionality of their organization. However, it should be noted that 2,7% of regional tourism agencies are quite disappointed with the performance of their organization and they claim that the main reasons for this are the insufficient human resources and/or the inadequate financial support from the central administration.

Graph 6



The management structure was also of major concern for the present study. There is a clear indication that the management system is simple and coherent for the majority of the (DMOs). However, the effectiveness or the level of functionality is questionable by many organizations. Almost 70% of the regional tourism organizations identify their management system quite effective whereas 65% of urban destinations consider their organizational structure very practical. Similarly, around 85% of the coastal destinations claim that their administration is simple and quite effective. On the contrary, 30% of the regional promotion bodies in Europe argue that although their management is quite successful still the bureaucracy is moderately high. Lastly, only a few national tourism boards, mainly from Europe describe their management system as 'complex' and 'not effective' (see graph 7).

Graph 7



7. Goals and Priorities of the (DMOs)

Tourism is an extremely demanding and competitive industry and each (DMO) ought to coordinate and manage successfully various components of the visitor's stay. Although the characteristics and the level of development vary from one destination to another, the ultimate challenge for each organization is to maximize visitor value and ensure certain benefits for the local economy and the host population. However, in order to meet any goals each (DMO) needs an integral plan with specific short, medium and long term actions. The coherence and the feasibility of this plan are crucial elements for the effectiveness of the destination governance.

Present

There is a strong diversification regarding the goals and priorities of different destination entities. Nevertheless, there is a general indication that most of the objectives of (DMOs) focus on the following broad areas of interest:

- Visitors satisfaction
- Tourism industry integration
- Product development and quality

Apart form the obvious overlapping (see graph 8), it seems that the main priority in many (CVBs) and in urban destinations is to deliver excellent value to visitors by providing quality tourism products and services. On the other hand, the basic consideration of coastal, rural and mountain destinations is to develop actions and launch initiatives which are beneficial for the local tourism industry.

➡ Some70% of (CVBs) have focused on promotional activities and publications addressed to the facilitation/information of visitors and the customer relationship management (CRM).

➡ Over 60% of urban destinations have developed a strategic plan, emphasizing on 'event management' and the development of sport and/or cultural activities.

➡ Almost 40% of coastal destinations have designed sustainable services and created innovative tourism products.

Most of the (DMOs) at national and regional level have used their capacity and resources to evaluate the current situation in the tourism sector by collecting information regarding major source markets and emerging tourism trends.

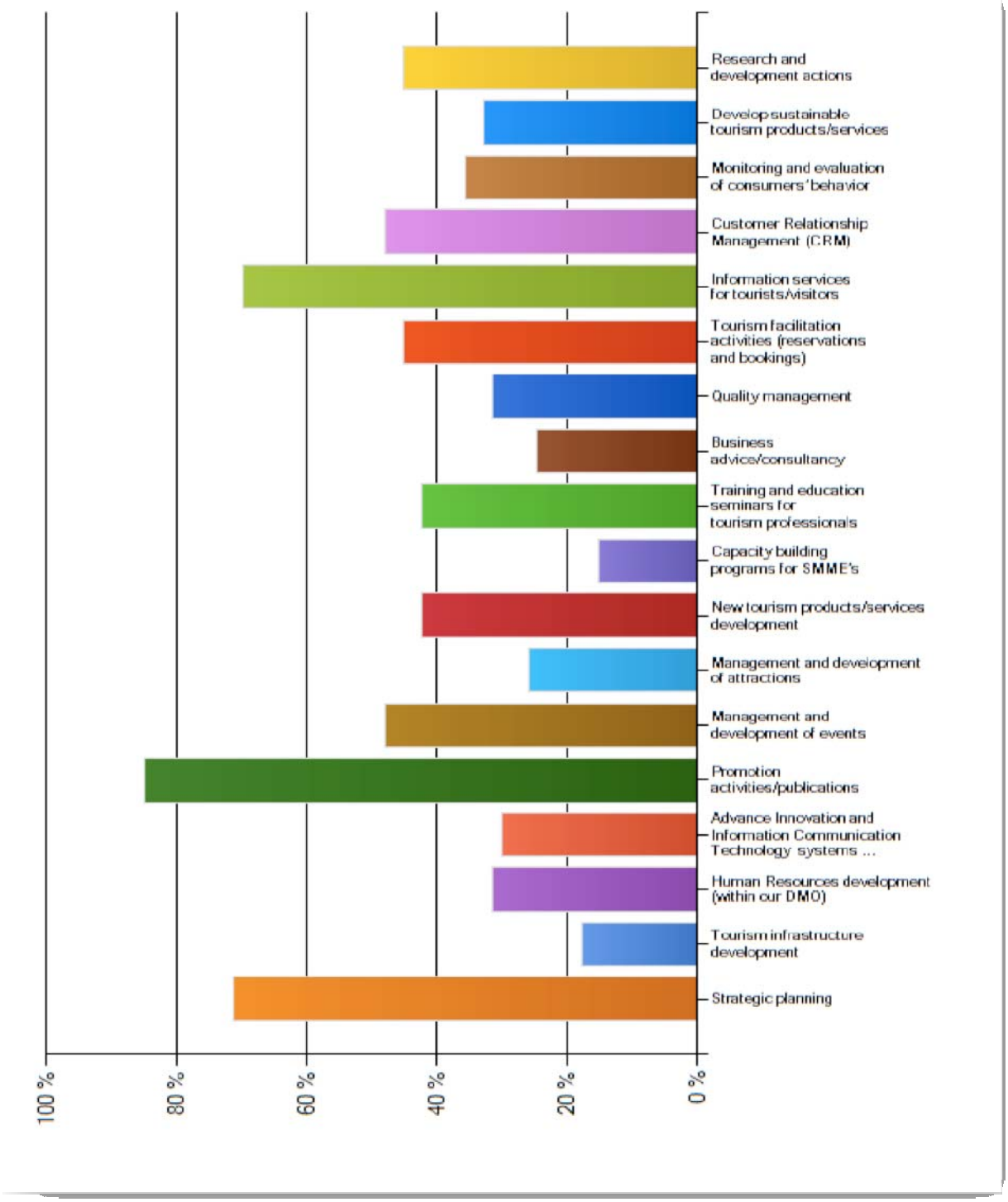
- Around 60% of the national tourism boards and some 40% of regional tourism promotion companies have invested in tourism research and product development.
- Subsequently, 67% of coastal, 79% of rural and 84% of mountain destinations have focused on attractions management.
- More than 75% of regional tourism promotion bodies in Europe have prioritized quality improvement and management functionality.

The majority of the coastal, rural, mountain and small state destinations have realized that a vital factor for improving competitiveness and efficiency is the enhancement of their human resources. Furthermore, many mature destinations have encouraged the synergies and the partnerships with the local tourism industry.

- Almost 90% of the (DMOs) in mountain areas and 75% in coastal destinations have launched training seminars and capacity building programs for tourism SMME's.
- It is estimated that 31,5% of major urban destinations and 45% of (CVBs) provide consultancy services for tourism businesses or participate in advisory boards with tourism professionals.

It seems that very few (DMOs), mainly in mountain, rural and small state regions have taken actions regarding innovation and ICT systems in 2009. The (DMOs) of the less developed or the relatively remote mountain, insular and small state destinations have extensively used the Internet for the promotion of local tourism business and/or the attractions and tourist sites of the area.

Graph 8
List of current activities of the (DMOs)



Future

Most of the (DMOs) are planning several actions or activities for the future which, in general, focus on the following focal areas:

- Funding
- Strategic planning
- Marketing and Promotion
- Partnerships and collaborations
- Human resources management
- Development of new tourism products and services
- Travel facilitation

Although there is a high interrelationship among the above areas, it is quite certain that for the majority of the destinations the main preoccupation is how to increase the economic benefits and find additional funding sources.

➡ Around 90% of the (CVBs), 80% of urban and almost all the coastal, rural and mountain destinations seek for additional funding either from national or regional sources.

➡ About 70% of the (DMOs) in rural and coastal areas stimulate local economy spin-offs by creating new tourism-oriented jobs, increasing the sales taxes and contracting local firms especially.

➡ Many urban destinations and (CVBs) have focused on generating funds from the private stakeholders, attracting new investors and providing incentives to increase overnight arrivals, tourist expenditure and receipts and extent the length of stay.

➡ Some 30% of national tourism promotion boards have announced an increase on sales taxes and lodge tax revenues in their medium term plans.

Although tourism infrastructure is a vital element for the 'destination management', only the national tourism boards in Europe and some (CVBs) in U.S.A have included it in their agenda. The main reason for this is that the development, execution and supervision of major works such as ports, airports, railway and road networks, which are crucial for tourism fall under the full responsibility of the national governments.

Certainly, marketing is a crucial element for all the (DMOs) at any level. The vast majority of national and regional tourism promotion bodies have prioritized certain promotional actions and marketing activities in order to best present the assets and the comparative advantages of

the destination. One of the future goals of some regional tourism organizations, is the creation of a separate private-public promotional body which will be responsible for the development of marketing plans and the coordination of joint advertising campaigns.

➡ Most of the (DMOs) in coastal, mountain and rural areas have acknowledged the necessity of joint marketing actions. In collaboration with the tourism industry and other local stakeholders they have planned specific promotional activities such as launching advertising campaigns, joint participation in conferences, exhibitions etc.

➡ More than 60% of urban destinations focus on the image and the brand of their area as important tools for using their comparative advantages, promoting specific segments of the tourism product and addressing niche markets.

One of the most successful paradigms of destination governance is the development of partnerships and synergies between the (DMO) and the tourism industry. In this line, several (DMOs) in coastal and mountain areas and most of the (CVBs) have expressed their intention to collaborate with private stakeholders and public authorities in order to organize training programs for tourism professionals, and public consultation meetings for raising the awareness of host communities regarding sustainable tourism.

These initiatives may increase the economic viability, ensure the physical integrity, protect natural resources, enhance cultural interaction between hosts and guests and lead to the social equity and prosperity of local communities.

A critical issue for several regional tourism boards is to integrate their human resources. Among their priorities is to increase the number of permanent staff and subcontract tourism experts/consultants on a temporary basis. However, according to the opinions of the directors of the regional tourism bodies a major obstacle for the implementation of these actions is the tight budget which mainly derives from the national administration and it is fixed for every year. Enhancing the know-how of the staff has been identified as a vital objective for the service quality in the majority of coastal, rural destinations and small state areas. Additionally, many (DMOs) in coastal, rural and mountain areas have included the improvement of the entrepreneurial skills of local tourism businesses in their immediate plans.

With the aim of enhancing the destination's competitiveness, some 60% of the urban destinations have streamlined the development of new tourism products and services.

➡ Most of mountain, coastal, rural and small state destinations will focus on special interest tourism such as adventure, sports, M.I.C.E, gastronomic and cultural tourism.

➡ Several urban destinations in Europe and Africa and many (CVBs) in the U.S.A believe that the way to attract high yield visitors and increase tourism revenue can be realized by enriching local product with added-value tourism services and coordinating new events and activities.

Travel facilitation is another important concern for the (DMOs) in relatively new tourism destinations whose major concern is to increase inbound flows. Apart from issues like tax revokes, tourism legislation update and social tourism benefits that are main considerations of the central governments; some regional tourism boards and several (CVBs) in collaboration with local tourism industry have provided special offers for domestic visitors, discounts on off-peak periods, and promotional actions for special interest tourism products/services.

Finally, it seems that the vast majority of the (DMOs) have acknowledged the increasing importance of information technologies (IT) for the promotion, positioning and branding of their destination. Particularly, Internet has been identified as a crucial corporate tool for the customer relations management and the reduction of the operational costs of the (DMOs).

➡ The vast majority of mountain, rural, coastal, and small state destinations have recognized Internet as a primary vehicle for the promotion of local tourism products and attractions.

8. Upcoming Challenges and Further Suggestions

Beyond any doubt, the main preoccupation for many (DMOs) is funding, i.e. sustain or secure the flows from the already existing financial sources and explore new channels for raising funds for the next year. The limited resources and the unprecedented scale of the current economic downturn have increased the level of insecurity for many (DMOs) which are now, more than before, preoccupied about their economic viability.

The abortion of several plans and the cutting off of several costs, appear on the agenda of many national tourism boards and regional tourism companies as an antidote to the crisis. Several coastal, urban and some small state destinations have strengthened their partnerships with local stakeholders or built joint marketing activities. Nevertheless, it appears that the higher the autonomy and the self-sustained the management structure is, the less the economic difficulties for the organizations. The dependence on governmental funding combined with a significant level of overlapping and control, has created few possibilities for the regional tourism boards to be detached from the central administration and launch new initiatives and/or actions.

According to the life cycle approach[5] the tourism products of many mature coastal and urban destinations have reached the level of stagnation and their (DMOs) have realized that the 'business as usual' model will not help tourism economy to recover, especially after the impact of the global economic crisis. Therefore, the (DMOs) of the tourism areas with a significant decline in tourism demand have prioritized the rejuvenation of their image and development of new sustainable products and services.

Current analysis of the consumer perceptions and trends, design of sustainable tourism services and focus on specific tourism segments or markets are some of the immediate actions towards this direction. Eventually, the expectation of the (DMOs) is to establish a competitive identity which will be distinctive, memorable and valuable to visitors. Practically, the pursuit of excellence, the enrichment of tourism services and the improvement of tourism facilities are of first priority for many coastal, rural and mountain areas and the majority of urban destinations and regional development companies.

It appears that emerging destinations primarily in mountain, small state and rural areas are more concerned about upgrading new technologies and information systems so that they can better promote local tourism products to the visitors. The application of knowledge management is essential for the operational performance, the functionality and the productivity for several urban desti-

[5] Butler, R. W. (1980), 'The Concept of a Tourism Area Cycle of Evolution: Implications for Management of |Resources', *Canadian Geographer*, Vol. 14.

nations, coastal areas and many (CVBs).

Human resources integration and capacity building programs have been incorporated in the strategic plans of some newly established (DMOs). Also, some (DMOs) in South Africa, Middle East and South America seek for possible solutions to change the negative 'image' or opinion of the tourism market regarding issues of travel safety and hygiene conditions at the destinations.

Most of the regional development companies suggested that reforming national legislation for tourism and simplifying the tendering procedures for tourism businesses and investments could be a helpful measure not only for the tourism industry but also for the operational effectiveness of their organization. Furthermore, raising awareness of the tourism professionals on sustainability issues and training the staff will help several (DMOs) in rural, mountain and small state destinations to build a value-added product and a customer oriented profile.

Another important challenge is the penetration of (IT) in all promotion and marketing activities. Some urban and coastal destinations explore alternative funding resources, launch new partnerships with the local tourism industry and establish networks with tourism associations and development agencies at national and transnational level.

Last but not least, for many national tourism promotion boards, regional tourism organizations and major urban destinations the innovation in product development, branding and positioning are some feasible objectives in order to maximize destination management quality and deliver excellent value services to the visitors.

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or

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Successful Paradigms of Good Destination Governance

1. A CVB in an urban destination in U.S.A has included two local universities in its management board. The contribution of these educational institutions is crucial since they may provide constant information on current segments and a continuous analysis of the emerging tourism trends. The universities have offered their know-how and their premises to facilitate training seminars and capacity building workshops for local tourism professionals.

2. A non profit public private partnership organization in South East Mediterranean under the supervision and support of the chamber of commerce, has recently established a collaboration scheme, with local tourism associations and transportation providers. The main priority of this scheme is to increase the operational capacity of the local airport by creating direct connections with major source markets.

3. A parastatal tourism department of a regional government in South Africa in collaboration with tourism stakeholders and local authorities has launched an initiative for changing the negative perceptions of international tourists regarding crime and corruption in the area. By designing a whole new marketing strategy the ultimate goal is to promote an image of a safe and friendly tourism destination.

4. A national tourism promotion board from the Middle East has built synergies with private stakeholders and signed agreements with domestic tour operators and transportation providers in order to get special prices for tourism packages that will confront seasonality and promote the country as a year round destination.

5. A partnership of public authorities in north side of the Aegean archipelago has recently jointed a global initiative for destinations' excellence. By following a specific system of measures the ultimate goal for the organization is to develop sustainable tourism services, sustain local attractions, upgrade tourism facilities and establish an enduring essence of the destination.

6. A public authority of a major tourism region in Iberian Peninsula has outsourced to a private company the development of a marketing plan which will include strategies for the promotion of local culture and identity. This action may boost the social interaction between visitors and hosts by giving to their encounters a constructive and beneficial character which eventually increase the satisfaction of tourists and safeguard the integrity of locals.

7. A single public authority in Melanesia has taken the initiative to play the intermediate actor between the private sector and the national tourism authorities in order to improve travel facilitation and upgrade the quality standards of the tourism product. Two of the immediate results of this action were the provision of rebates on travel taxes and the inauguration of business meetings exploring possible collaborations and synergies between tourism and the other economic sectors.

ANNEX I- Questionnaire in English

Benchmarking on Destination Governance/Management Structures

Purpose of the Survey

The purpose of this survey is to analyze the type of governance and benchmark the management structures of different Destination Management Organizations (DMO's) across the world. By completing this questionnaire, you are providing valuable information, which, along with other additional input will allow UNWTO to elaborate specific recommendations. The findings of this survey will help DMO's at the national, regional and/or local levels to implement functional decision-making processes, optimize their human and financial resources, upgrade their performance and put good governance into action.

---

1. **What is the type of your organization?**
   (Please tick one)

	National Tourism Authority (NTA)
	National Tourism Organization (NTO)
	National Tourism Promotion Board
	Regional/provincial tourism organization
	Urban destination
	Coastal/rural/mountain destination
	Insular/small state
	Other (please write in)……

2. What is the form of governance of your organization?
(Please tick one)

	Department of single public authority
	Partnership of public authorities
	Convention bureau
	Public authority outsourcing delivery to private company
	Non profit public-private partnership
	Non profit association of tourism businesses
	Regional/local developmental agency
	Department of national government
	Department of regional/provincial or municipal government
	Other (please write in)…….

3. What was your total budget for the year 2009, including staff fees and overheads?
(Please tick one)

Up to $500.000	
US $ 500.001 – 750.000	
US $750.001 – 1m	
US $1 - 1.5 m	
US $1.5 - 5 m	
US $ 5- 10 m	
US$ 10- 15 m	
More than US$15 m	

4. Please indicate the number of people working at your organization.
(Give the appropriate number for each type of contract)

Permanent staff	Temporary staff	Consultants/ experts

5. What is the accommodation capacity (number of beds) of your areaof jurisdiction?
(Please tick one)

	Up to 500
	501-1000
	1.001 – 2.000
	2.001 – 3.000
	3.001 – 5.000
	5.001 – 10.000
	10.001 – 20.000
	20.001 – 50.000
	More than 50.000

6. According to your available data, what was the number of overnight stays within your area for the period 2008-2009?

	Up to 10.000
	10.001-25.000
	25.000 – 50.000
	50.001 – 75.000
	75.001 – 100.000
	More than 100.000

7. How would you rate the overall operating performance of your DMO?

Extremely good	Substantially good	Good	Poor	oor	Extremely poor

8. Who are the main stakeholders/partners in your organization?
(Please tick as many as appropriate)

National and regional/provincial government	
Economic development agency	
Local authority/department	
City center management organization	
Convention bureau	
National park authority	
Transport association	
Accommodation association	
Restaurant, leisure and retail providers	
Tour operators and travel agencies	
Attractions, events and congress organizers	
Sports associations	
Women cooperatives/cultural associations	
Local tourism consortia and partnerships	
Skill development institutions and centers for vocational training	
Other (Please write in)……	

9. **Please indicate the partnership or co-operation schemes in which the private sector has been involved:**
(Please tick as many as appropriate)

Advisory boards	
Joint Management units	
Sectoral liaison groups	
Corporate partnerships with private associations and agencies	
Membership	
Registration (annually or periodically)	
Outsourcing/subcontracting private companies	
Visitors/tourists services and products	

10. **Please indicate the level of involvement / collaboration of private stakeholders/ partners *in* your organization's functions:**
(Please tick one column for each function)

	Very high	High	Moderate	Low	Very low
Strategic planning					
Product development					
Positioning Branding & Marketing					
Funding					
Monitoring & following up					

Please provide any additional details on each matter (e.g. % funded, role in key decision making, development of specific products/services, etc.):

11. How would you evaluate the managerial and institutional structure of your organization?
(Please tick one)

Simple and effective	Simple but not effective	Not very Simple but quite effective	Neither simple nor effective

12. What is the level of autonomy of your organization from the central administration regarding the management and operational activities?
(Please tick one)

Very high	High	Low	Very low

13. In your opinion, which are the main benefits of your organization's form of governance? *(e.g, develop long term strategies and goals, effective decision making, establish new partnerships, sufficient funding resources, support local SMME's etc)*
(Up to 4 choices)

a. ……..
b. ……..
c. ……..
d. ……..

14.* In your opinion, which are the main drawbacks of your organization's form of governance? *(e.g lack of long term planning, slow and non effective decision making, inadequate use of resources, poor economic benefits, etc)
(Up to 4 choices)

a. ……..
b. ……..
c. ……..
d. ……..

15. Which are the key goals/priorities of your organization?
(Please write in)

_____

_____

_____

_____

16. Which of the following activities / functions are currently being undertaken by your organization?

(Tick as many activities/responsibilities as appropriate)

Type of activity/responsibility	
Strategic planning	
Tourism infrastructure development	
Human Resources development (within our DMO)	
Advance Innovation and Information Communication Technology systems (ICT)	
Promotion activities/publications	
Management and development of events	
Management and development of attractions	
New tourism products/services development	
Capacity building programs for SMME's	
Training and education seminars for tourism professionals	
Business advice/consultancy	
Quality management	
Tourism facilitation activities (reservations and bookings)	
Information services for tourists/visitors	
Customer Relationship Management (CRM)	
Monitoring and evaluation of consumers' behavior	
Develop sustainable tourism products/services	
Research and development actions	

17. In your opinion, what are the main challenges for your organization in the coming years?
(Please write in)

……
……
……

18. Do you have any additional suggestions, comments or ideas that you believe will improve the performance and/or advance the governance process in your organization?
(Please write in)

……
……
……
……

19. Please provide the following contact information:

Name:	
Organization:	
Position:	
Address:	
City/Town:	
ZIP/Postal Code:	
Country:	
Email:	
Phone:	
Fax:	

THANK YOU FOR YOUR CONTRIBUTION AND COOPERATION!

ANNEX II- Questionnaire in French

Étude d'étalonnage sur les structures de gestion et la gouvernance des destinations

Objet de l'enquête

Cette enquête a pour objet de procéder à une analyse comparative des structures de gestion de différents Organismes de gestion des destinations (OGD) dans le monde entier et d'analyser leur type de gouvernance. En complétant ce questionnaire, vous fournissez des informations de valeur qui, combinées à d'autres suggestions, permettront à l'OMT d'élaborer des recommandations précises. Les conclusions de cette enquête aideront les OGD aux échelons national, régional et/ou local à mettre en place des procédures de prise de décisions fonctionnelles, à optimiser leurs ressources humaines et financières, à améliorer leurs résultats et à mettre en pratique une bonne gouvernance.

1. Quel type d'organisation êtes-vous ?
(cochez une case)

☐	Administration nationale du tourisme (ANT)
☐	Organisation nationale du tourisme (ONT)
☐	Comité de promotion du tourisme national
☐	Organisation régionale/provinciale du Tourisme
☐	Destination urbaine
☐	Destination côtière/rurale/de montagne
☐	État insulaire/petit État
☐	Autre (précisez)……

2. Quel est le type de gouvernance de votre organisation ?
(cochez une case)

	Service d'une administration publique
	Partenariat entre autorités publiques
	Office de tourisme de congrès
	Autorité publique sous-traitant à une entreprise privée
	Partenariat public-privé sans but lucratif
	Association d'entreprises touristiques sans but lucratif
	Agence de développement régional/local
	Service de l'administration centrale
	Service de l'administration régionale, provinciale ou municipale
	Autre (précisez)……

3. Quel était votre budget total pour l'année 2009, y compris les salaires et les frais généraux ?
(cochez une case)

Jusqu'à 500 000 dollars É.-U	
Entre 500 001 et 750 000 dollars É.-U	
Entre 750 001 et 1 million de dollars É.-U.	
Entre 1 et 1,5 million de dollars É.-U.	
Entre 1,5 et 5 millions de dollars É.-U.	
Entre 5 et 10 millions de dollars É.-U.	
Entre 10 et 15 millions de dollars É.-U.	
Plus de 15 millions de dollars É.-U.	

4. **Veuillez indiquer le nombre de personnes qui travaillent dans votre organisation.**
(précisez le nombre de personnes pour chaque type de contrat)

Personnel Permanent	Personnel temporaire	Consultants/ experts

5. **Quelle est la capacité de logement (en nombre de lits) de votre circonscription administrative ?**
(cochez une case)

	Jusqu'à 500
	Entre 501 et 1 000
	Entre 1 001 et 2 000
	Entre 2 001 et 3.000
	Entre 3 001 et 5 000
	Entre 5 001 et 10 000
	Entre 10 001 et 20 000
	Entre 20 001 et 50 000
	Plus de 50 000

6. **D'après les données dont vous disposez, combien de nuits ont été passées sur place dans votre circonscription administrative pour la période 2008-2009 ?**

	Jusqu'à 10 000
	Entre 10 001 et 25 000
	Entre 25 001 et 50 000
	Entre 50 001 et 75 000
	Entre 75 001 et 100 000
	Plus de 100 000

7. Quelle appréciation d'ensemble portez-vous sur les résultats de votre OGD ?

Excellente	Très bonne	Bonne	Moyenne	Mauvaise	Très Mauvaise

8. Qui sont les principaux participants et partenaires dans votre organisation ?
(cochez autant de cases que nécessaire)

Administration régionale, provinciale ou nationale	
Organisme de développement économique	
Service/autorité locale	
Organisme de gestion du centre ville	
Office de tourisme de congrès	
Parc national	
Association de transports	
Association de logements	
Restaurants, organismes de loisirs et détaillants	
Tour opérateurs et agences de voyage	
Organisateurs de divertissements, d'événements et de congrès	
Associations sportives	
Associations culturelles/coopératives de femmes	
Partenariats et consortiums touristiques locaux	
Établissements de renforcement des compétences et centres de formation professionnelle	
Autre (préciser)……	

9. Parmi les activités, organes ou partenariats suivants, lesquels ont été souscrits ou rejoints par le secteur privé de votre région ?

Comités consultatifs	
Unités de gestion conjointe	
Groupes de liaison sectorielle	
Associations avec des entreprises et des organismes privés	
Membres	
Inscriptions (annuelle ou périodique)	
Entreprises privées faisant de la sous-traitance	
Services et produits pour les visiteurs et les touristes	

10. Veuillez préciser le niveau de participation et de collaboration des intervenants et partenaires privés dans les fonctions de votre organisation :

(cochez une case pour chaque fonction)

	Très élevé	Élevé	Moyen	Bas	Très bas
Planification stratégique					
Création de produits					
Positionnement, gestion de l'image de marque et commercialisation					
Financement					
Contrôle et suivi					

Veuillez donner des précisions pour chaque point (par exemple le pourcentage du financement, le rôle joué dans la prise de décisions importantes, la création de produits et de services particuliers, etc.) :

_____

_____

_____

_____

11. Quelle appréciation portez-vous sur la structure de direction et institutionnelle de votre organisation ?

(cochez une case)

Simple et efficace	Simple mais pas efficace	Pas très simple mais assez efficace	Ni simple ni efficace

12. Quel est le degré d'autonomie de votre organisation par rapport à l'administration centrale pour ce qui est des activités de gestion et opérationnelles ?

(cochez une case)

Très élevé	Élevé	Bas	Très bas

13. À votre avis, quels sont les principaux avantages que présente la forme de gouvernance de votre organisation ? *(par exemple l'élaboration de stratégies et d'objectifs à long terme, une prise de décisions efficace, l'établissement de nouveaux partenariats, des sources de financement suffisantes, un soutien aux PMME locales, etc.)*

(4 avantages maximum)

a. ……..
b. ……..
c. ……..
d. ……..

14.* À votre avis, quels sont les principaux inconvénients que présente la forme de gouvernance de votre organisation ? *(par exemple l'absence de planification à long terme, un processus de prise de décisions lent et inefficace, une mauvaise utilisation des ressources, des retombées économiques faibles, etc.)

(4 inconvénients maximum)

a. ……..
b. ……..
c. ……..
d. ……..

15. Quels sont les principaux objectifs ou les principales priorités de votre organisation ?

(précisez)

16. Parmi les activités et fonctions ci-dessous, lesquelles sont actuellement menées ou remplies par votre organisation ?
(Cochez autant d'activités et de responsabilités que nécessaire)

Type d'activité ou de responsabilité	
Planification stratégique	
Création d'infrastructures touristiques	
Développement des ressources humaines (au sein de votre OGD)	
Renforcement des systèmes d'innovation et des technologies de l'information et des communications	
Publications et activités de promotion	
Gestion et organisation d'événements	
Gestion et organisation de divertissements	
Création de nouveaux produits et services touristiques	
Programmes de renforcement des capacités pour les PMME	
Séminaires de formation et d'enseignement pour les professionnels du tourisme	
Missions de conseil/consultation pour les entreprises	
Gestion de la qualité	
Activités de facilitation du tourisme (réservations et enregistrements)	
Services d'information pour les touristes et les visiteurs	
Gestion de la relation client	
Contrôle et évaluation du comportement des consommateurs	
Élaboration de produits et services du tourisme durable	
Programmes de renforcement des capacités pour les PMME	

17. À votre avis, quels sont les principaux défis que votre organisation devra relever au cours des prochaines années ?
(précisez)

_____

_____

_____

_____

_____

18. Avez-vous d'autres propositions, observations ou idées qui, à votre avis, permettront d'améliorer les résultats et/ou le processus de gouvernance de votre organisation ?
(précisez)

_____

_____

_____

_____

19. Veuillez fournir vos coordonnées.

Nom:
Organisation:
Poste:
Adresse:
Ville:
Code postal:
Pais:
E-mail:
Tel:
Fax:

MERCI DE VOTRE PARTICIPATION ET DE VOTRE COLLABORATION !

ANNEX III- Questionnaire in Spanish

Análisis comparativo de estructuras de gobernanza y gestión de destinos

Propósito de la encuesta

El propósito de esta encuesta es analizar el tipo de gobernanza y referenciar las estructuras de gestión de las diferentes organizaciones de gestión de destinos (OGD) del mundo. Al cumplimentar este cuestionario, nos proporciona una valiosa información que, sumada a otras aportaciones, permitirá a la OMT elaborar recomendaciones específicas. Los resultados de esta encuesta ayudarán a las OGD a escala nacional, regional y local a aplicar procesos de adopción de decisiones funcionales, a optimizar sus recursos humanos y financieros, a mejorar su actuación y a poner en práctica una buena gobernanza.

1. ¿Qué tipo de organización es la suya?
(Marque la opción que corresponda)

☐	Autoridad nacional de turismo (ANT)
☐	Organización nacional de turismo (ONT)
☐	Oficina nacional de promoción del turismo
☐	Organización regional/provincial de turismo
☐	Destino urbano
☐	Destino costero/rural/montañoso
☐	Estado insular/pequeño
☐	Otro (indique cuál)……

2. ¿Qué tipo de gobierno existe en su organización?
(Marque la opción que corresponda)

	Departamento de autoridad pública única
	Asociación de autoridades públicas
	Oficina de congresos
	Autoridad pública que subcontrata trabajos a empresas privadas
	Consorcio público-privado sin ánimo de lucro
	Asociación sin ánimo de lucro de empresas turísticas
	Organismo de desarrollo regional/local
	Departamento del gobierno nacional
	Departamento del gobierno regional/provincial o municipal
	Otro (indique cuál)……

3. ¿Cuál fue su presupuesto total para el año 2009, incluidos los gastos de personal y los gastos generales?
(Marque la opción que corresponda)

Menos de 500.000 dólares de los EE.UU.	
Entre 500.001 y 750.000 dólares de los EE.UU.	
Entre 750.001 y 1 millón de dólares de los EE.UU.	
Entre 1 y 1,5 millones de dólares de los EE.UU.	
Entre 1,5 y 5 millones de dólares de los EE.UU.	
Entre 5 y 10 millones de dólares de los EE.UU.	
Entre 10 y 15 millones de dólares de los EE.UU.	
Más de 15 millones de dólares de los EE.UU.	

4. Indique el número de personas que trabajan en la organización
(Indique el número que corresponda para cada tipo de contrato)

Personal fijo	Personal temporal	Consultores/ expertos

5. ¿Qué capacidad hotelera (número de camas) tiene su área de jurisdicción?
(Marque la opción que corresponda)

	Menos de 500
	501-1000
	1.001 – 2.000
	2.001 – 3.000
	3.001 – 5.000
	5.001 – 10.000
	10.001 – 20.000
	20.001 – 50.000
	Más de 50.000

6. Según los datos de que dispone, indique el número de estancias con pernoctación en su zona para el periodo 2008-2009.

	Menos de 10.000
	10.001-25.000
	25.001 – 50.000
	50.001 – 75.000
	75.001 – 100.000
	Más de 100.000

7. ¿Cómo calificaría el funcionamiento operativo de su OGD?

Extraordinariamente bueno	Notablemente bueno	Bueno	Más bien mediocre	Mediocre	Extraordinariamente mediocre

8. ¿Quiénes son los principales interesados/socios de su organización? (Marque todas las opciones que estime apropiadas)

Gobierno nacional y regional/provincial	
Organismo de desarrollo económico	
Autoridad/departamento local	
Organización de gestión del centro urbano	
Oficina de congresos	
Autoridad de parque nacional	
Asociación del ámbito del transporte	
Asociación del ámbito del alojamiento	
Restaurantes, proveedores de ocio y comercio minorista	
Operadores turísticos y agencias de viaje	
Organizadores de atractivos turísticos, eventos y congresos	
Asociaciones deportivas	
Cooperativas de mujeres/asociaciones culturales	
Consorcios y asociaciones locales de turismo	
Instituciones de desarrollo de habilidades y centros de formación profesional	
Otros (Indique cuáles)……	

9. ¿A qué tipo de estructura o asociación se ha unido el sector privado en su zona?

Comités consultivos	
Unidades de gestión conjunta	
Grupos sectoriales de enlace	
Consorcios corporativos con asociaciones y agencias privadas	
Estructuras de miembros	
Inscripciones (anuales o periódicas)	
Externalización/subcontratación de empresas privadas	
Servicios y productos para visitantes/turistas	

10. Indique el grado de participación / colaboración de los interesados/socios privados en las funciones de su organización:
(Marque una columna para cada función)

	Muy alto	Alto	Moderado	Bajo	Muy bajo
Planificación estratégica					
Desarrollo de productos					
Posicionamiento, creación de marca y marketing					
Financiación					
Control y seguimiento					

Indique cualquier detalle adicional sobre cada punto (p. ej. % financiado, papel en decisiones clave, desarrollo de productos/servicios específicos, etc.):

11. ¿Cómo evaluaría la estructura gestora e institucional de su organización?
(Marque la opción que corresponda)

Simple y efectiva	Simple pero poco efectiva	No demasiado simple pero bastante efectiva	Ni simple ni efectiva

12. ¿Qué grado de autonomía tiene su organización con respecto a la administración central en cuanto a gestión y actividades operativas?
(Marque la opción que corresponda)

Muy alto	Alto	Bajo	Muy bajo

13. En su opinión, ¿cuáles son las principales aportaciones de la forma de gobernanza de su organización? *(p. ej. formulación de estrategias y objetivos a largo plazo, adopción efectiva de decisiones, forja de nuevas asociaciones, recursos financieros suficientes, apoyo local a las pymes y microempresas, etc.)*
(Indique hasta 4 opciones)

a. ……..
b. ……..
c. ……..
d. ……..

14.* En su opinión, ¿cuáles son las principales deficiencias de la forma de gobernanza de su organización? *(p. ej. falta de planificación a largo plazo, adopción de decisiones lenta y poco efectiva, uso inadecuado de los recursos, escasos beneficios económicos, etc.)
(Indique hasta 4 opciones)

a. ……..
b. ……..
c. ……..
d. ……..

15. ¿Cuáles son los principales objetivos/prioridades de su organización?

_____

_____

_____

_____

16. ¿Cuáles son las principales actividades/funciones que está emprendiendo actualmente su organización?
(Marque todas las actividades/responsabilidades que considere apropiadas)

Tipo de actividad/responsabilidad	
Planificación estratégica	
Desarrollo de infraestructura turística	
Desarrollo de recursos humanos (en nuestra OGD)	
Promoción de la innovación y la información: sistemas de tecnologías de la comunicación (TIC)	
Actividades de promoción/publicaciones	
Gestión y desarrollo de eventos	
Gestión y desarrollo de atractivos turísticos	
Desarrollo de nuevos productos/servicios turísticos	
Programas de capacitación para pymes y microempresas	
Seminarios de formación y educación para profesionales del turismo	
Asesoramiento/consultoría empresarial	
Gestión de la calidad	
Actividades de facilitación del turismo (reservas)	
Servicios de información para turistas/visitantes	
Gestión de las relaciones con los clientes	
Seguimiento y evaluación del comportamiento de los consumidores	
Desarrollo de productos/servicios turísticos sostenibles	
Planificación estratégica	

17. **En su opinión, ¿cuáles son los principales retos para su organización en los próximos años?**

……
……
……

18. Indique cualquier sugerencia, comentario o idea adicional que crea que puede mejorar el funcionamiento y el proceso de gobernanza de su organización:

……
……
……
……

19. Favor proporcionar su información de contacto.

Nombre:
Organización:
Cargo:
Dirección:
Ciudad:
Código postal:
País:
Correo electrónico:
Teléfono:
Fax:

GRACIAS POR SU COOPERACIÓN !