



**World Tourism Organization
Survey of
Destination Management
Organisations
Report
April 2004**

Executive Summary

This large-scale research of Destination Management Organisations (DMOs) has been undertaken for the World Tourism Organization by Tourism Enterprise and Management (TEAM), and is the first of its kind carried out on a global basis. It is intended as a benchmark survey to track the development and activities of these organisations on a regular basis and future surveys will target a broader range of National and Regional organisations as well as looking in more depth at individual countries.

The study includes specific data relating to the size and scale of DMOs as well as their opinions on key issues and the role of international organisations like the WTO. Future surveys will build upon the knowledge gathered here, and may focus on specific topics in addition to those covered within the initial research.

Of the 550 DMOs approached, 44% responded, mostly through an on line survey; giving a robust sample of organisations at the National Tourism Organisation or Authority (NTO/NTAs), Regional or State/Provincial DMOs and City DMOs. This report therefore examines in outline the profile of these three types of organisation against the total sample.

At the national level, the governance of tourism management organisations has a high level of consistency - 88% are either a department of National Government or an agency accountable to National Government. At the provincial or regional level, the pattern is less consistent. There, a majority of regions and 39% of city DMOs are accountable to regional, provincial or state government, but there are various other governance models and there is a much higher level of private sector involvement, through some form of public-private partnership, particularly at the city level.

A substantial number of the organisations surveyed have significant size and spending power - 60% of NTO/NTAs having operational budgets in excess of US\$15million, more than 150 staff and marketing budgets in excess of US\$10 million. The report identifies core marketing and product development activities, information collection and reservations roles undertaken by each type of DMO. Provincial/regional organisations tend to be smaller and have more limited resources, although a small proportion are substantial operations, on a scale similar to NTOs. All DMOs engage in a wide range of marketing activities, and that range of activities does not necessarily reduce where budgets are lower. It is clear that, in the majority of smaller DMOs, resources are thinly spread, seeking to meet the needs of different groups of stakeholders.

For all types of DMOs, the use of 'new media' activities will represent an increasingly important aspect of their marketing. These anticipated growth areas include:

- CRM
- Email Marketing
- The use of IT systems that enable the input of information and content to be handled on a distributed basis - i.e. not having to be channelled through a central department
- Real-time (immediate) Web reservations services

Probably the greatest change in the operating environment for these organisations has been the switch to the Internet as the preferred medium for consumers to obtain destination information and, to a more limited extent, the growth of online purchasing of travel products.



The study focused specifically on the degree to which DMOs had adopted and implemented an e-business strategy. It is evident that the most significant progress in this respect has been at a national level - 86% of NTO/NTAs have an e-business strategy, of which 75% consider it to have had a major impact on the way they work, compared to figures of just 43% and 63% for city DMOs.

25% of the sample were Members of the WTO (their definition might include Associate Members and Affiliates) 21% were members of ETC and IACVB and 11% members of PATA. Of the roles seen as important for International Tourism Organisations the most highly ranked were market research and the publication of international tourism trends. WTO members also ranked highly the development of international standards and training.

The study asked DMOs for their opinions on both the way tourism structures worked in their own country and the role of the public sector in promoting tourism. At a regional level the sample was pretty much divided between those who thought that the tourism structure in their country works well most of the time and those who thought the tourism structure in their country sometimes does not work well. At the national level, there was a higher degree of apparent satisfaction with the status quo - only one third of NTOs stating that the structure might sometimes not work well.

Almost all the organisations supported a continuing important role for the public sector in destination management and marketing, but the most strongly endorsed view was that "A public private partnership is the best way to promote and organise destinations". There was also a very high level of agreement that tourism development, management, marketing and promotion should be managed within an integrated structure.



1 Introduction

1.1 Background

Destination Management Organisations (DMOs) are the organisations responsible for the management and/or marketing of destinations and generally fall into one of the following categories:

- National Tourism Authorities (NTAs) or Organisations (NTOs), responsible for management and marketing of tourism at a national level
- Regional, provincial or state DMOs (RTOs), responsible for the management and/or marketing of tourism in a geographic region defined for that purpose, sometimes but not always an administrative or local government region such as a county, state or province
- Local DMOs, responsible for the management and/or marketing of tourism based on a smaller geographic area or city/town

The market environment facing DMOs has changed dramatically during the last decade, there are new issues facing these organisations and priorities are changing. Specifically the paramount importance of promoting and selling tourism products over the Internet has given rise to the need for new types of activity and new supporting technologies.

This is the first time that a global study of DMOs on this scale and range of topics has been attempted. In commissioning this research, it was realised that the diversity and geographic spread of the survey would present considerable challenge but that the rewards of collecting and disseminating the resulting information would be considerable.

The first survey has been kept relatively simple in order to gain valuable results and ensure a high response rate, but also to test the methodology and develop a robust platform for development of future surveys and to identify issues that might be examined in more detail in future surveys.

1.2 Objectives

The objectives established for the survey were:

- To develop a reliable basis of knowledge about the structure, scale, status, activities, resources and priorities of DMOs on a country-by-country basis, throughout the world.
- To understand the institutional framework within which DMOs work and, more specifically, the ways in which DMOs relate to government (national, regional/provincial and local) and to other public agencies, and their relative roles and responsibilities
- To measure DMO attitudes and actions on key policy issues – exploring an initial set of issues in the first phase, with the facility to look at other issues subsequently



- To identify potential examples of best practice
- To establish the position of DMOs relating to international tourism organisations:
 - The extent of their current involvement
 - Their potential interest in participating in WTO activities for DMOs
 - The types of benefits that they require
- To understand the extent to which DMOs, individually or jointly, are involved in performance measurement and in economic impact measurement and the methodologies that are used.
- To provide relevant data for key factors, to facilitate benchmarking of DMO performance.
- To understand the needs of DMOs for shared and/or supported services (such as web site assessment, research tools and ASP services)

1.3 Methodology

A list (included in Appendix 1) of DMOs and senior management contacts was drawn up including:

- Affiliates of WTO
- Agreed major DMOs in a range of target countries
- A greater number and depth of DMOs in selected agreed countries, to allow a more in depth examination of regional DMOs

Initially, an e-mail was sent to each DMO contact (usually the CEO or Director), asking them to visit the survey website through a link within the email and complete the questionnaire online. Where this was not possible due to malfunctioning or unavailable email, a fax was sent requesting a fax or mail response. In a few cases where no operating fax or email was available, the surveys were mailed.

Both the email or fax communication and the questionnaire were sent in the most appropriate of the four languages used: English, German, French and Spanish. A German version of the questionnaire was not originally planned but introduced at a relatively late stage when it became apparent that this was necessary to produce a satisfactory response level.

The survey was administered through completion of the questionnaire online, generally by DMOs themselves or, in a few cases only, on their behalf from a completed faxed questionnaire.

Up to three further follow up emails or faxes were sent and at least one telephone call made to promote completion of the questionnaire. Telephone calls were not pursued when it became clear that language was a barrier – principally in Japan and China.



1.4 Sample and scope

More than 550 DMOs were approached in 29 countries. The complete sample, indicating those who responded, is included in Appendix 1. The sample consists of:

- National Tourism Organisations (NTOs) and Authorities (NTAs)
- Regional, provincial and state tourism organisations
- City tourism organisations
- Other DMOs such as resort management organisations

Response was just under 44% yielding a total sample of 241 DMOs taking part in the survey. It should be noted that respondents were permitted by the system to skip questions, in order to ensure as full a response as possible. For a few questions the skip rate was as high as 40%, probably indicating some difficulty with the subject matter or an unwillingness to disclose (for example) financial data.

Response rates by country indicate that the language of the questionnaire and supporting information may have been a major factor in promoting response:

Countries with over 50% of DMOs responding (#)	25-49% Responding (#)	Under 25% response rate (#)
UK (34)* Ecuador (4) Slovenia (4) Canada (24)* New Zealand (10) South Africa (7) Spain (23)* France (21)* Argentina (9) Australia (17)* Austria (9) Bahrain (1) Malta (1)	Brazil (9)* Mexico (14)* Caribbean (7) Sweden (7) Italy (7) Finland (6) Germany (13)* Ireland (4) Netherlands (4) Maldives (2)	China (3) Malaysia (2) Seychelles (1) India (2) Egypt(1) Indonesia (1) Thailand (1) Morocco (1) Japan (0) UAE (0)

*Countries where a deeper focus was targeted

A key lesson of this research was that, in order to promote a high response rate, the questionnaire should be wherever possible in the native tongue. Response is significantly higher in countries where TEAM has strong relationships with DMOs and we should try, as originally intended, to develop similar response levels elsewhere through the relationships of WTO regional representatives.

The majority (145) of respondents answered the questionnaire in English. The largest grouping of one type of DMO was at the regional/provincial or state level (126) with 54 City DMOs, and the sample includes a combined total of 33 NTA and NTO DMOs



Which one of the following terms best describes the role of your organisation?		
	Total Responses	%
National Tourist Authority (NTA)	15	6
National Tourism Organisation (NTO)	18	7
Regional provincial/state tourist organisation	126	52
City tourism organisation	54	22
Coastal resort organisation	6	2
Ski or other sports resort organisation	0	0
Other (please specify)	22	9
(Base)	(241)	

Those responding 'other' mainly included:

- Organisations that fulfilled more than one of the above roles, such as 'City and regional tourist organisation' or 'City, Regional & Provincial Convention Bureau'
- Sub regional or smaller area DMOs
- Convention Bureaux

The samples of each 'other' type are too small for meaningful analysis but it may be considered useful in later stages of the research to focus on these different types of organisation in greater numbers.

1.5 Future development

This research was not intended to constitute a 'one-off' survey, but to establish an ongoing Web-based source of knowledge about DMOs, which can be updated, extended and analysed relatively quickly and economically. This will facilitate the tracking of trends and provide a very useful tool in monitoring the effects of WTO and other development initiatives.

Now the survey infrastructure has been established and the initial sample of DMOs created, e-mails can be sent out regularly (say, once or twice per year) asking each DMO contact to go to the survey Website and update their information themselves. Results can then be drawn off automatically, as and when required.

This initial survey produced a sample of 250 DMOs. On the basis of the experience gained in this survey it is envisaged that a programme will 'roll-out' the survey 'horizontally' to other countries and 'vertically' to include more and perhaps smaller DMOs. The target might be to include 800-1000 DMOs by the end of Year 3.



2 Detailed Findings – Metrics of DMOs

2.1 DMOs Compared

2.1.1 Status of organisation

In addition to asking DMOs about their role, reported above in section 4, they were also asked to select the status of their organisation from a preset list of options.

Which one of the following best describes the status of your organisation?				
	NTO/NTA %	Region %	City %	Total Sample %
A national government department	47	2	0	7
An agency accountable to national government	41	3	0	7
A department of regional provincial/state or local government organisation	0	18	19	14
An agency accountable to a regional provincial/state or local government organisation	0	36	20	25
A 'not for profit' public-private partnership	13	21	33	24
A 'not for profit' association of tourism businesses	0	14	9	12
A profit-driven commercial company	0	2	6	3
Other (please specify)	0	5	13	7
<i>(Base)</i>	<i>(32)</i>	<i>(126)</i>	<i>(54)</i>	<i>(239)</i>

The simplest status models exist at the NTO and NTA level, where 88% of organisations are either a department of National Government or an agency accountable to National Government. Four of the NTOs/NTAs are not for profit public-private partnerships. Throughout this research we have grouped together NTOs and NTAs in order to gain a large enough sample for analysis of tourism structures at a national level.

At a regional level the status of organisations is more varied. The majority are accountable to regional, provincial or state government, either as an agency or in fewer cases (18%) as a department of local government. However, 37% have private sector involvement (21% within a public private partnership), which is much higher at the regional level than the national level.

39% of City DMOs have regional, provincial or local government accountability, and the percentage of public private partnerships (33%) and profit driven companies (6%) is highest in this sector.

In all cases where an 'other' is specified it is similar to, but phrased differently, or a combination of more than one of, the check list definitions of organisation status above



2.1.2 Overall budgets and sources of finance

Respondents were asked which of a number of ranges of expenditure described their last financial year's overall operating budget and to attribute the sources of that finance to a number of categories.

How much was your organisation's last annual <u>overall</u> budget including staffing and overheads?				
	NTO/NTA %	Region %	City %	Total Sample %
Up to US\$500,000	0	19	15	15
US\$500,001 – 750,000	0	6	13	7
US\$750,001 – 1million	4	9	9	8
US\$1-1.5 million	4	10	15	9
US\$1.5-5 million	4	35	23	30
US\$5-10 million	13	12	15	12
US\$10-15 million	9	4	9	6
More than US\$15 million	65	5	2	12
<i>(Base)</i>	<i>(23)</i>	<i>(100)</i>	<i>(47)</i>	<i>(191)</i>

The scale of the operations of the DMOs taking part in this questionnaire is evident from the level of spending, with almost two thirds of national DMOs having an annual operating spend in excess of US\$15 million. Although there is more of a range of budgets in city and regional DMOs, overall 60% of these DMOs had an annual budget in excess of US\$1.5million.

The next three tables show, for each of the main types of DMO interviewed, the sources of funding to support these budgets.

NTO/NTAs

What percentage of this budget comes from each of the following sources? (NTO/NTAs) <i>percentage of total sample base with income in each range</i>					
	1-20%	21-40%	41-60%	61-80%	81-100%
National Government	0	0	4	22	48
Regional provincial/state or local government	5	0	4	0	0
Hotel tax or other specific indirect tax	5	5	4	0	0
Membership fees from tourism businesses	10	0	0	0	0
Activity related or advertising income from tourism businesses	19	19	4	0	0
Other	14	0	0	0	0
<i>(Base 27 NTO/NTA DMOs)</i>					

Unsurprisingly the majority of NTO and NTA funding comes from National Government, 70% of NTO/NTA respondents derive more than 60% of funding from this source. The next most significant source is activity related or advertising income from tourism businesses, which accounts for up to 20% of income for 5 respondents, and between 20 and 40% for a further 5.



Regions

What percentage of this budget comes from each of the following sources? Region/provincial/state DMOs - percentage of total sample with income in each range					
	1-20%	21-40%	41-60%	61-80%	81-100%
National Government	14	11	1	0	3
Regional provincial/state or local government	10	11	12	20	16
Hotel tax or other specific indirect tax	6	5	2	0	1
Membership fees from tourism businesses	26	5	1	1	2
Activity related or advertising income from tourism businesses	29	9	4	3	0
Other	14	4	7	1	0
<i>(Base – 100 regional, provincial/state or local DMOs)</i>					

29% of Regional DMOs receive funding from a National Government and 48% receive more than 40% of their budget from regional provincial/state or local government. Other significant sources of finance at the regional level are membership fees and activity or advertising related income from tourism businesses, but in the majority of cases these account for less than 20% of budget

Cities

What percentage of this budget comes from each of the following sources? – City DMOs) percentage of total sample with income in each range					
	1-20%	21-40%	41-60%	61-80%	81-100%
National Government	17	0	0	0	0
Regional provincial/state or local government	11	19	19	23	21
Hotel tax or other specific indirect tax	17	2	4	0	0
Membership fees from tourism businesses	38	6	2	2	2
Activity related or advertising income from tourism businesses	38	17	4	4	2
Other	26	4	4	4	2
<i>(Base 47 city DMOs)</i>					

It is at city level that membership fees, and activity or advertising related income from tourism businesses assume their greatest importance, with 44% and 55% respectively drawing up to 40% of budget from these areas. Even so all but two of the city DMOs interviewed drew some funding from regional provincial/state or local government, with 44% drawing more than 60% from this source.



2.1.3 Staff

The number of staff (as full time equivalents) is also an important factor in defining the size of DMOs. The scale of NTO/NTA operations in comparison to regions and cities becomes immediately apparent, with 21 out of the 25 NTO/NTAs having more than 50 staff, and 15 having more than 150 staff

How many staff work within your organisation?				
	NTO/NTA %	Region %	City %	Total Sample %
Up to 10	0	26	20	22
11-20.	4	19	24	20
21-30	4	18	14	14
31-40	8	8	4	8
41-50	0	8	10	7
51- 100	16	13	22	15
101 –150	8	4	4	4
More than 150	60	5	2	12
<i>(Base)</i>	<i>(25)</i>	<i>(102)</i>	<i>(50)</i>	<i>(199)</i>

2.1.4 Tourism beds

The number of tourism beds within the area for which the DMO is responsible illustrates the variation in tourism market sizes, in many cases regions are accounting for more tourism beds than NTOs or NTAs

How many tourism beds are available within your area?				
	NTO/NTA %	Region %	City %	Total Sample %
Up to 500	0	0	2	1
501-1,000	0	4	6	4
1,001 – 2,000	0	6	2	4
2,001 – 3,000	0	4	14	7
3,001 – 5,000	10	13	14	14
5,001 – 10,000	5	21	8	14
10,001 – 20,000	10	15	16	16
20,001 – 50,000	24	11	31	18
More than 50,000	52	26	6	23
<i>(Base)</i>	<i>(21)</i>	<i>(100)</i>	<i>(49)</i>	<i>(191)</i>



2.1.5 Marketing spend

How much was your organisation's marketing budget for 2003 excluding staff and overheads?				
	NTO/NTA %	Region %	City %	Total Sample %
Up to US\$100,000	4	17	24	17
US\$100,001 to 200,000	0	13	9	11
US\$200,001 to 300,000	0	4	7	4
US\$300,001 to 500,000	0	16	16	14
US\$500,001 to 1 million	0	15	16	13
US\$1 to 5 million	26	26	24	26
US\$5 to 10 million	9	4	4	4
More than US\$10 million	61	5	0	11
(Base)	(23)	(100)	(45)	(190)

More than 60% of NTO/NTAs and 15% of all DMOs included in the survey have a marketing budget excluding staff and overhead costs in excess of US\$10 million. Nevertheless there are significant numbers of DMOs, 46% in all, operating on marketing budgets of under US\$500,000

2.2 Activities

2.2.1 Promotions and Marketing Activities

	NTO/NTA		Region		City		Total	
	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %
Production and distribution of brochures and print	100	96	96	86	100	94	97	90
International market planning	96	91	69	72	63	73	71	75
Domestic market planning	65	61	83	73	82	90	82	78
International advertising	91	87	60	65	61	63	64	69
Domestic advertising	61	61	88	74	84	86	83	77
Operation of a web site	96	91	94	83	98	94	95	88
Direct mail	70	74	64	57	55	57	63	59
Email marketing	70	83	47	67	39	80	48	73
Customer relationship management (CRM)	43	70	43	62	33	61	42	64
Travel exhibitions fairs and trade shows - organisation	83	74	69	57	59	55	66	58
Organisation of other events	91	87	76	70	57	65	72	71
Travel exhibitions fairs and trade shows - attending	96	91	95	84	96	92	95	88
Marketing to the travel trade	87	83	79	72	76	78	78	75
Convention Bureau operations	39	48	40	44	67	73	49	55
Market research	96	87	67	68	65	76	70	73
Other	30	30	24	23	14	14	21	21
None of these	0	0	0	0	0	0	0	0
(Base)	(23)	(23)	(102)	(102)	(49)	(49)	(195)	(195)



Respondents were asked, for a list of alternative promotions and marketing activities, to indicate those that they had undertaken in the last three years and those they anticipated undertaking in the next three years. More than 90% of DMOs interviewed across all three main types currently undertake the four core marketing activities of:

- Production and distribution of brochures and print
- Operation of a web site
- Attending travel exhibitions fairs and trade shows
- Organisation of events

The majority of all types of DMOs also undertake:

- Direct mail
- Trade marketing

The responsibility for market research, international market planning and advertising, and organisation of events, including travel exhibitions and fairs, is more likely to rest with the NTO/NTAs. Conversely the regional and city level are more likely to be involved in domestic marketing.

There are three areas of activity that are projected to be undertaken by significantly more DMOs of all types in the next three years

- Email Marketing
- Customer Relationship Management (CRM)
- Convention Bureau operations

All other promotional and marketing activities are either projected to be static or slightly declining in terms of the number of DMOs undertaking them.

Other marketing and promotion not on the prompted list, listed under 'other' and not picked up by subsequent questions included:

- Media and PR
- Media and trade familiarisation trips
- Events/conferences/festivals

These will be added to the prompt list for future surveys



2.2.2 Information Collection Activities

Which of the following types of tourism information collection activities has your organisation you undertaken in the last 3 years? And which do you anticipate undertaking in the next 3 years?								
	NTO/NTA		Region		City		Total	
	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %
Collection of a wide range of tourist information including accommodation	91	83	90	78	91	89	90	82
Operation of an information/content management system	65	74	62	75	47	66	58	71
Operation of Information Centres for visitors	83	65	59	58	79	81	66	65
Other	9	9	12	13	9	13	12	13
None of these	0	0	2	0	2	2	3	2
<i>(Base)</i>	<i>(23)</i>	<i>(23)</i>	<i>(100)</i>	<i>(100)</i>	<i>(47)</i>	<i>(47)</i>	<i>(190)</i>	<i>(190)</i>

Almost all DMOs are involved in the collection of information to some extent and none saw themselves dropping this function altogether in the future, there was a slight decline in the number of organisations that anticipated undertaking the collection of a wide range of tourist information.

However, significantly more anticipated the operation of an information/content management system in the next three years than had operated such a system in the past three years. This trend is broadly similar across the three main DMO categories, with more than two thirds anticipating operating such a system over the next three years.

2.2.3 Reservation Services

Which of the following types of reservation services has your organisation itself provided in the last 3 years? And which do you anticipate undertaking in the next 3 years?								
	NTO/NTA		Region		City		Total	
	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %
Provision of a reservation service through Information Centres	19	24	34	35	47	59	38	42
Provision of a reservations service to telephone callers	29	29	32	38	39	51	33	41
Provision of a live (real-time) web based reservation service	24	38	15	41	31	61	20	47
Other	5	10	1	2	0	2	2	3
None of these	52	38	41	31	29	18	37	27
<i>(Base)</i>	<i>(21)</i>	<i>(21)</i>	<i>(91)</i>	<i>(91)</i>	<i>(49)</i>	<i>(49)</i>	<i>(180)</i>	<i>(180)</i>



37% of DMOs overall and more than half of NTO/NTAs provide no reservation service at all currently, potentially reflecting the difficulty that a significant number of DMOs have in processing commercial transactions, competing with the trade, or engaging in the reservations process

Although the provision of reservations through TICs remains relatively static overall, more city DMOs anticipate offering this type of reservation service over the next three years than did so in the past three years.

Significantly more of both city and regional DMOs anticipate providing of a reservations service to telephone callers over the next three years than the past three, and the provision of a real-time web based reservation service looks set to double, with increases anticipated across all DMO types.

Respondents were also asked – for this type of activity only - whether they anticipated outsourcing reservation services rather than operating in house

Please also indicate if these are or will be outsourced rather than delivered by your organisation				
	NTO/NTA %	Region %	City %	Total Sample %
Provision of a reservation service through Information Centres	5	18	8	12
Provision of a reservations service to telephone callers	5	18	12	14
Provision of a live (real-time) web based reservation service	14	22	10	17
<i>(Base)</i>	<i>(21)</i>	<i>(91)</i>	<i>(49)</i>	<i>(180)</i>

2.2.4 Product Related Activities

Which of the following product-related activities have you undertaken in the last 3 years? And which do you anticipate undertaking in the next 3 years?								
	NTO/NTA		Region		City		Total Sample	
	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %	Past 3 %	Next 3 %
Package development and operation	41	41	44	52	52	63	44	53
Classification and/or licensing of tourism businesses	64	50	31	27	17	23	28	28
Development of physical resources such as visitor centres signage etc	50	50	56	53	50	63	50	52
Regulation of the industry	45	45	21	28	10	19	21	27
Human resource development and vocational training	59	45	55	56	35	48	50	52
Advice and/or finance to assist tourism businesses	64	68	71	67	33	46	57	59
Other	5	5	12	11	0	0	7	6
None of these	5	5	2	2	6	4	5	4
<i>(Base)</i>	<i>(21)</i>	<i>(21)</i>	<i>(95)</i>	<i>(95)</i>	<i>(48)</i>	<i>(48)</i>	<i>(185)</i>	<i>(185)</i>



Almost all DMOs appear to be involved in some sort of product development activity, with more than half of the total sample providing:

- Development of physical resources such as visitor centres signage etc
- Human resource development and vocational training
- Advice and/or finance to assist tourism businesses

NTO/NTAs are more likely to be involved in classification and/or licensing of tourism businesses and regulating the industry but there is significant regional involvement in this area of activity and more regional and city DMOs anticipate undertaking regulation of the industry in the next three years.

Overall, more DMOs say they will undertake package development and operation in the next three years than did so in the past 3 years

2.2.5 E-business strategy and implementation

Respondents were asked a series of questions relating to their implementation of e-business strategy, its progress to date and its impact upon the way that the organisation works.

Does your organisation have a strategy for the implementation of e-business?				
	NTO/NTA %	Region %	City %	Total Sample %
Yes	86	53	43	54
No (base)	14 (21)	47 (96)	57 (24)	46 (184)
Is this e-business strategy leading to substantial changes in the way your organisation works?				
Yes	75	63	63	66
No	15	22	21	21
Don't know (base)	10 (20)	16 (51)	17 (24)	13 (106)
How well advanced are you in implementing your e-business strategy?				
Not started	11	17	4	12
Less than half way	26	46	39	42
More than half-way	53	35	48	41
Complete (Base)	11 (19)	2 (52)	9 (23)	5 (105)

More than half of DMOs overall are implementing an e-business strategy, only 5% have completed implementation, 12% have not started implementation yet. In two thirds of cases the strategy is anticipated to have a major impact upon the way that the DMO works.

At an NTO/NTA level e-business strategy seems to be more advanced. 86% of participating national DMOs claimed to have a strategy for the implementation of e-business strategy and almost two thirds of these were more than halfway to completing or had completed implementation. Three quarters of NTOs and NTAs believed that their e-business strategy would lead to substantial changes in the way they worked.



2.2.6 Impact of e-business strategy on activities

For those who have in place an e-business strategy and anticipate a substantial change in the way they work, referred to here as 'E-Business Adopters' the responses to current and projected activities have been re-analysed:

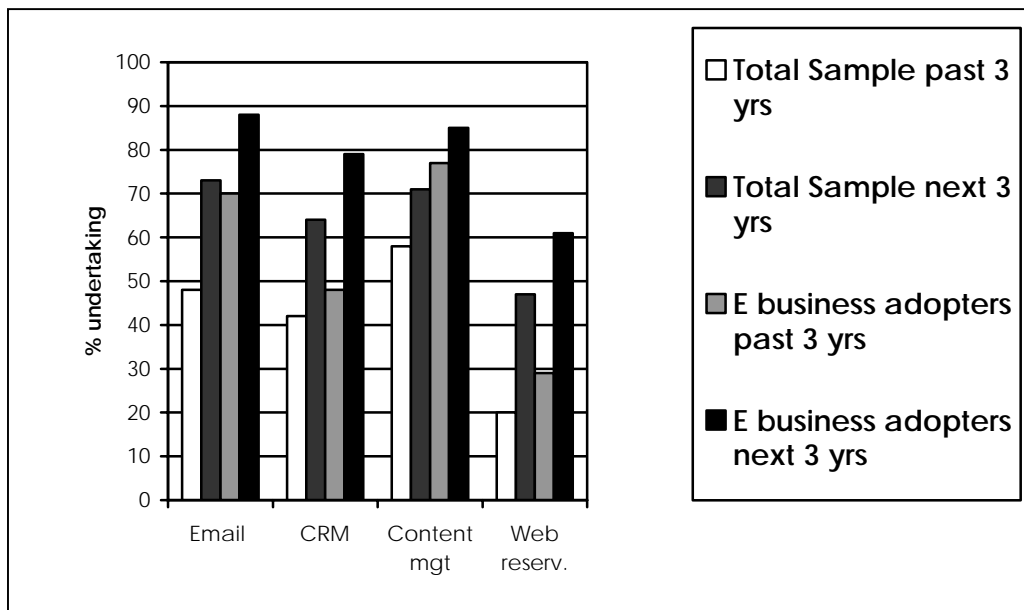
DMOs with e-business strategy and anticipating substantial change in the way they work – 'E business Adopters'		
Promotions and marketing activities	Past 3 years %	Next 3 Years %
Production and distribution of brochures and print	100	90
International market planning	85	85
Domestic market planning	87	84
International advertising	76	81
Domestic advertising	84	81
Operation of a web site	100	93
Direct mail	76	70
Email marketing	70	88
Customer relationship management (CRM)	48	79
Travel exhibitions fairs and trade shows - organisation	76	69
Organisation of other events	84	84
Travel exhibitions fairs and trade shows - attending	97	90
Marketing to the travel trade	90	85
Convention Bureau operations	55	58
Market research	90	88
Other	27	28
None of these	0	0
Information Collection activities		
Collection of a wide range of tourist information including accommodation	95	82
Operation of an information/content management system	77	85
Operation of Information Centres for visitors	70	68
Other	12	15
None of these	0	0
Reservation services		
Provision of a reservation service through Information Centres	45	47
Provision of a reservations service to telephone callers	42	44
Provision of a live (real-time) web based reservation service	29	61
Other	3	9
None of these	17	15
Product related activities		
Package development and operation	45	56
Classification and/or licensing of tourism businesses	33	32
Development of physical resources such as visitor centres signage etc	47	47
Regulation of the industry	20	26
Human resource development and vocational training	53	53
Advice and/or finance to assist tourism businesses	65	68
Other	5	5
None of these	6	6
<i>(base)</i>	<i>(66)</i>	<i>(66)</i>



From this sub sample it is evident that the areas in which e-business strategy is anticipated to have most impact are consistent with the trends within the total sample, these 'E-business Adopters' appear to be already further ahead in undertaking these four core e-business activities:

- Email marketing
- CRM
- Content and information management systems
- Real time web based reservations

Past three years and next three years – core e-business activities



The impact on other reservations systems, information collection, product related and marketing activities is not significantly greater than the slight decline noted in the sample as a whole. However the question relates to whether these activities will be undertaken at all, not to the anticipated level of each activity or budget allocated.

2.3 Evaluation of performance

Is your organisation's performance evaluated quantitatively?				
	NTO/NTA %	Region %	City %	Total Sample %
Yes	83	74	69	74
No	17	26	31	26
(Base)	(23)	(100)	(48)	(193)

Three quarters of DMOs responding said that their performance was evaluated quantitatively. For NTAs and NTOs this rose to 83%.



2.3.1. Key performance indicators

Respondents were asked this question in an open ended format and the responses indicated that there are eight key performance indicators, a mixture of which apply to most DMOs

- Tourist nights/overnight stays
- Numbers of tourists and visitors of special events/attractions
- Period of stay
- Occupancy
- Tourist tax income
- Number of city guided tours
- New investments
- Number of visitors in information centres

2.4 The influence of destination size

The sample consisted of not only a broad range of DMO types but also a broad range of destination sizes, expressed here by the number of tourist beds. This section looks at some of the metrics of destinations according to size, grouping destinations as follows:

- 29 destinations with under 3,000 tourist beds
- 26 destinations with between 3,001 and 5,000 beds
- 27 destinations with between 5,001 and 10,000 beds
- 31 destinations with between 10,001 and 20,000 beds
- 35 destinations with between 20,001 and 50,000 beds
- 43 destinations with more than 50,000 beds
-

2.4.1 Budgets by numbers of tourist beds

Overall operating budget

How much was your organisation's last annual <u>overall</u> budget including staffing and overheads? By number of tourist beds (000=K)						
	<3K	3-5K	5-10K	10-20K	20-50K	50K +
Up to US\$500,000	32	26	22	10	6	2
US\$500,001 – 750,000	21	13	4	6	6	0
US\$750,001 – 1million	18	17	7	10	0	2
US\$1-1.5 million	11	26	19	10	3	0
US\$1.5-5 million	14	17	26	42	33	41
US\$5-10 million	4	0	11	10	27	12
US\$10-15 million	0	0	7	10	6	10
More than US\$15 million	0	0	4	3	18	32
(Base)	(28)	(23)	(27)	(31)	(33)	(41)



Marketing budget

How much was your organisation's marketing budget for 2003 excluding staff and overheads? By number of tourist beds (000=K)						
	<3K	3-5K	5-10K	10-20K	20-50K	50K +
Up to US\$100000	46	21	22	13	9	5
US\$100001 to 200000	31	21	15	10	0	0
US\$200001 to 300000	0	13	0	3	9	2
US\$300001 to 500000	12	21	19	23	12	7
US\$500001 to 1 million	12	8	11	16	18	10
US\$1 to 5 million	0	17	22	32	29	41
US\$5 to 10 million	0	0	7	0	12	2
More than US\$10 million*	0	0	4	3	12	32
<i>(Base)</i>	<i>(26)</i>	<i>(24)</i>	<i>(27)</i>	<i>(31)</i>	<i>(34)</i>	<i>(41)</i>

Generally speaking there is a wide range of budget levels within each tourism bed based category and clearly in a minority of cases there are extremely large tourism markets with quite low spends and vice versa

2.4.2 Staff numbers by tourist beds

How many staff work within your organisation? By number of tourist beds (000=K)						
	<3K	3-5K	5-10K	10-20K	20-50K	50K +
Up to 10	41	44	22	16	9	12
11-20.	38	32	26	10	17	7
21-30	3	20	15	23	3	19
31-40	3	0	11	19	3	7
41-50	7	0	11	3	11	9
51- 100	3	4	11	26	26	12
101 -150	0	0	4	3	11	5
More than 150	3	0	0	0	20	30
<i>(Base)</i>	<i>(29)</i>	<i>(25)</i>	<i>(27)</i>	<i>(31)</i>	<i>(35)</i>	<i>(43)</i>

Again for each tourism bed based category the number of staff within a DMO varies to a great degree and it is quite difficult to identify norms on this basis

2.5 Spend versus activity

The sample was further divided into four spending categories based upon overall spend of the organisation:

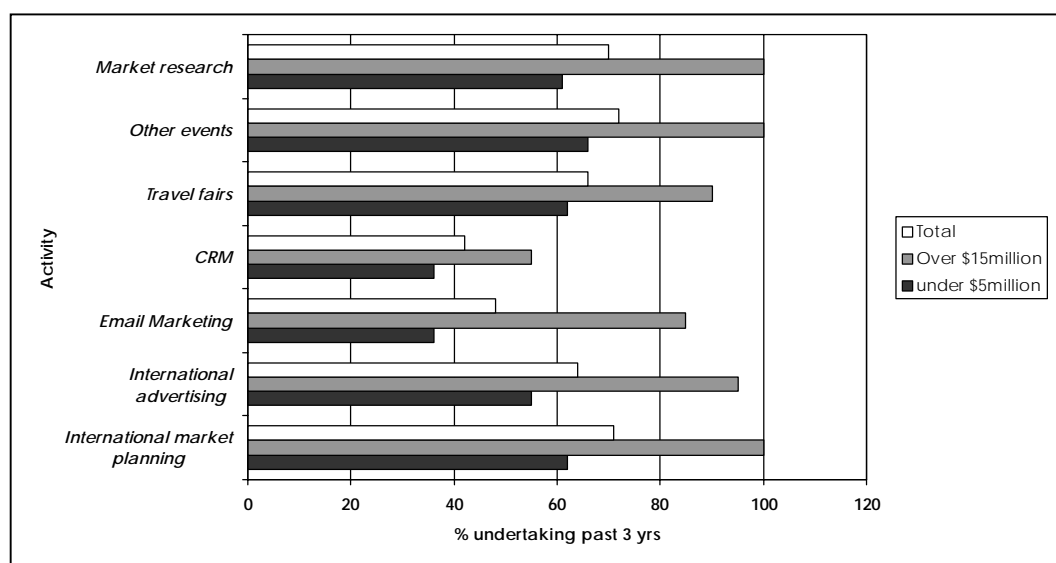
- DMOs spending under US\$5 million overall
- DMOs spending US\$5 –10 million overall
- DMOs spending US\$10 - 15 million overall
- DMOs spending more than US\$15 million overall



Activities over past three years by overall operating budget spending categories					
Promotions and marketing activities	<\$5m	\$5-10m	\$10-15m	\$15m+	Total
Production and distribution of brochures and print	96	100	100	100	97
International market planning	62	86	100	100	71
Domestic market planning	80	95	91	75	82
International advertising	55	73	100	95	64
Domestic advertising	83	86	82	75	83
Operation of a web site	95	95	100	100	95
Direct mail	61	68	64	80	63
Email marketing	36	68	73	85	48
Customer relationship management (CRM)	36	45	73	55	42
Travel exhibitions fairs and trade shows - organisation	62	77	64	90	66
Organisation of other events	66	77	73	100	72
Travel exhibitions fairs and trade shows - attending	92	95	100	100	95
Marketing to the travel trade	72	86	91	95	78
Convention Bureau operations	48	55	82	40	49
Market research	61	95	82	100	70
Other	15	27	36	45	21
None of these	0	0	0	0	0
<i>(Base)</i>	<i>(132)</i>	<i>(22)</i>	<i>(11)</i>	<i>(20)</i>	<i>(195)</i>

- The lower spending DMOs, which constitute the majority of the sample, all undertake some of these activities. They fall significantly below the average for some key activities:

Comparison of 20 highest spending DMOs with 132 lowest spending vs average – key differences in marketing and promotion activity



Note low base for high spenders in this and the following section – most reliable comparison is lowest spending with average

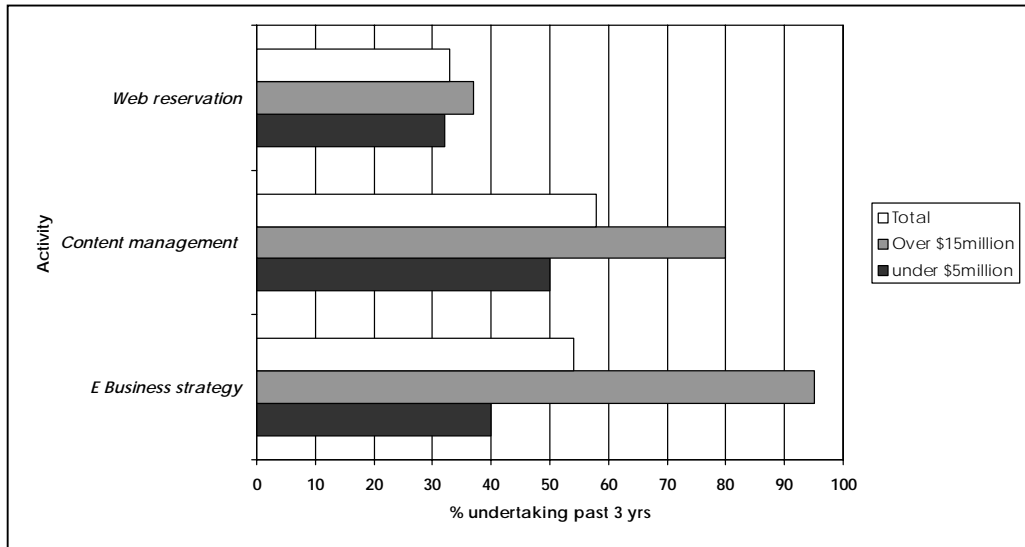


Activities over past three years by overall operating budget spending categories					
Information Collection activities	<\$5m	\$5-10m	\$10-15m	\$15m+	Total
Collection of a wide range of tourist information including accommodation	86	100	100	90	90
Operation of an information/content management system	50	71	80	80	58
Operation of Information Centres for visitors	62	81	70	80	66
Other	8	33	10	15	12
None of these	4	0	0	0	3
<i>(Base)</i>	<i>(130)</i>	<i>(21)</i>	<i>(10)</i>	<i>(20)</i>	<i>(190)</i>
Reservation services	<\$5m	\$5-10m	\$10-15m	\$15m+	Total
Provision of a reservation service through Information Centres	38	62	45	26	38
Provision of a reservations service to telephone callers	32	38	55	37	33
Provision of a live (real-time) web based reservation service	14	43	45	32	20
Other	2	5	0	5	2
None of these	36	29	9	47	37
<i>(Base)</i>	<i>(120)</i>	<i>(21)</i>	<i>(11)</i>	<i>(19)</i>	<i>(180)</i>
Product related activities	<\$5m	\$5-10m	\$10-15m	\$15m+	Total
Package development and operation	44	55	45	42	44
Classification and/or licensing of tourism businesses	21	40	45	53	28
Development of physical resources such as visitor centres signage etc	42	65	64	58	50
Regulation of the industry	16	10	36	32	21
Human resource development and vocational training	46	40	73	63	50
Advice and/or finance to assist tourism businesses	52	65	55	84	57
Other	6	15	9	5	7
None of these	6	0	0	5	5
<i>(Base)</i>	<i>(125)</i>	<i>(20)</i>	<i>(11)</i>	<i>(19)</i>	<i>(185)</i>
E- business strategy					
Yes	40	75	82	95	54
No	60	25	18	5	46
<i>(Base)</i>	<i>(125)</i>	<i>(20)</i>	<i>(11)</i>	<i>(19)</i>	<i>(185)</i>

Lower spending DMOs are less likely than average to have an e-business strategy and have undertake core e-business activities such as operation of an information/content management system and provision of a live (real-time) web based reservation service, in the past three years.



**Comparison of 20 highest spending DMOs with 132 lowest spending vs average
- key differences in e-business strategy and core systems activity**



Lower spending DMOs are also less likely than average to undertake classification and/or licensing of tourism businesses and development of physical resources such as visitor centres signage etc.



3 Role and membership of international organisations

3.1 International organisations- Membership

Respondents were asked which international organisations their DMO belonged to from a list provided.

Of which international organisations is your organisation a member?				
	NTO/NTA %	Region %	City %	Total Sample %
World Tourism Organization	45	27	12	25
Pacific Asia Travel Association	27	13	5	11
European Travel Commission	32	0	2	6
European Cities Tourism	5	5	59	21
International Association of Convention and Visitor Bureaus	14	8	39	21
Other (please specify)	45	42	39	44
<i>(Base)</i>	<i>(23)</i>	<i>(64)</i>	<i>(41)</i>	<i>(142)</i>

The range of 'other' organisations was considerable and included other membership bodies and regional bodies, as well as commercial travel organisations and certification bodies:

- ICCA
- EFCT
- MPI
- SITE
- UIA
- IATA
- ASTA
- European Festival and Events Ass
- Inbound Tour Operator's Council
- Caribbean Tourism Organisation
- Indian Ocean Tourism Organisation
- Etc....

3.2 Roles and services

Respondents were asked for a range of activities that might be provided by international organisations, how important they thought each was to their organisation.



Please tell us the importance to your organisation of the following services that might be provided by international tourism organizations – Total Sample						
	Very Important (3)	Important (2)	Moderately important (1)	Not very important (-1)	Not at all important (-2)	Mean score (+3 to -2)
Market research	52	34	11	2	1	2.3
Publication of international tourism trends	41	36	18	4	1	2.1
Development of international product standards	28	35	18	12	3	1.5
Development of standard tourism terminologies and concepts	22	36	23	14	4	1.4
Training	27	34	19	12	5	1.5
Provision of an international or global Web portal	26	28	24	17	2	1.4
Other international marketing initiatives	26	34	22	12	2	1.5
<i>(base=183)</i>						

The majority of respondents believed all the list of activities were 'very important' or 'important', however the most important activities by some considerable margin were:

- Market research
- Publication of international tourism trends

Respondents from DMOs in membership of WTO consider some of these elements rather more important than the sample as a whole, particularly in the areas of publication of tourism trends, development of international standards and 'other marketing initiatives'

Please tell us the importance to your organisation of the following services that might be provided by international tourism organisations – Total Sample versus WTO members		
Mean scores (+3 to -2)	WTO Members	Total Sample
Market research	2.3	2.3
Publication of international tourism trends	2.4	2.1
Development of international product standards	2.0	1.5
Development of standard tourism terminologies and concepts	1.6	1.4
Training	1.8	1.5
Provision of an international or global Web portal	1.3	1.4
Other international marketing initiatives	2.1	1.5
<i>(base)</i>	(33)	(183)



4 – Attitudes and opinions

4.1 How well tourism structures work

Respondents were asked to select a statement describing how well the tourism structure in their country worked, in their opinion:

With which of these statements do you agree?				
	NTA/NTO	Region	City	Total Sample
The tourism structure in my country works very well all the time (+2)	0	5	2	4
The tourism structure in my country works well most of the time (+1)	67	47	56	49
The tourism structure in my country sometimes does not work well (-1)	33	44	36	43
The tourism structure in my country works badly (-2)	0	4	7	4
Mean score (+2 to -2)	0.3	0.1	0.1	0.1
(Base)	(21)	(94)	(45)	(180)

53% of the total sample believed the tourism structure their country worked well all or most of the time, regions and cities were marginally more inclined than NTO/NTAs to be negative about the way tourism structures worked.

4.2 Views on public sector involvement

Respondents were asked to agree or disagree on a five point scale with a series of statements relating to the role of the public sector in tourism promotion:

Please tell me how much you agree or disagree with each of the following statements						
(Base = 181)	Agree strongly (+2)	Agree (+1)	Neither agree nor disagree	Disagree slightly (-1)	Disagree strongly (-2)	Mean score (+2 to -2)
The public sector should take the lead in promoting destinations	36	58	39	32	13	0.4
A public private partnership is the best way to promote and organise destinations	88	71	18	3	1	1.3
The public sector is often out of touch with the way the industry actually works	25	59	38	36	19	0.2
It is not good use of public money to promote destinations	6	9	13	30	122	-1.4
Tourism businesses should lead in promoting destinations	23	56	39	43	17	0.1
Tourism development management marketing and promotion should be managed within an integrated structure	106	56	14	1	3	1.5



There was strong general **agreement** to the statement 'Tourism development management marketing and promotion should be managed within an integrated structure' and 'A public private partnership is the best way to promote and organise destinations'

There was strong **disagreement** with the statement 'It is not good use of public money to promote destinations'

4.2.1 *Opinion on public sector involvement in tourism by type of DMO*

Please tell me how much you agree or disagree with each of the following statements				
	NTA/NTO	Region	City	Total Sample
Mean scores (+2 to -2)				
The public sector should take the lead in promoting destinations	0.2	0.6	0.4	0.4
A public private partnership is the best way to promote and organise destinations	1.3	1.3	1.3	1.3
The public sector is often out of touch with the way the industry actually works	-0.2	0.1	0.4	0.2
It is not good use of public money to promote destinations	-1.5	-1.3	-1.5	-1.4
Tourism businesses should lead in promoting destinations	0.3	0.1	0.2	0.1
Tourism development management marketing and promotion should be managed within an integrated structure	1.7	1.4	1.3	1.5
<i>(Base = 181)</i>	<i>(21)</i>	<i>(95)</i>	<i>(45)</i>	<i>(181)</i>

When results to this question are analysed by type of DMO, the responses are virtually identical, with NTO/NTAs marginally less likely to agree that the public sector is out of touch and that the tourism businesses rather than the public sector should take the lead.



Appendix 1 – sample and responding DMOs

Response levels by country - as per 11 March 2004.

Country	Language	No. emailed	No. Faxed/mailed	Total Sent	No. Responses	% of responses
Argentina	Spanish	15	0	15	9	60
Australia	English	29	1	30	17	57
Austria	English	9	0	9	8	89
Austria	German	6	0	6	1	17
Austria						60
Bahrain	English	0	2	2	1	50
Brazil	Spanish	17	0	17	9	53
Canada	French	7	0	7	6	86
Canada	English	31	1	32	18	56
Canada						62
Caribbean	Spanish	2	0	2	1	50
Caribbean	English	13	0	13	6	46
Caribbean						47
China	English	10	5	15	3	20
Ecuador	Spanish	5	1	6	4	67
Egypt	English	2	11	13	1	8
Finland	English	16	0	16	6	38
France	French	35	0	35	21	60
Germany	English	7	0	7	3	43
Germany	German	20	0	20	10	50
Germany						48
India	English	13	7	20	2	10
Indonesia	English	11	1	12	1	8
Ireland	English	15	0	15	4	27
Italy	English	17	1	18	7	39
Japan	English	14	1	15	0	0
Malaysia	English	10	0	10	2	20
Maldives	English	7	1	8	2	25
Malta	English	2	0	2	1	50
Mexico	Spanish	32	1	33	14	42
Morocco	French	1	14	15	1	7
Netherlands	English	15	0	15	4	27
New Zealand	English	15	0	15	10	67
Seychelles	English	6	0	6	1	17
Slovenia	English	6	0	6	4	67
South Africa	English	11	1	12	7	58
Spain	Spanish	40	0	40	23	58
Sweden	English	15	0	15	7	47
Thailand	English	12	0	12	1	8
UAE	English	3	1	4	0	0
UK	English	41	0	41	34	83
Total		510	49	559	249	45



List of DMOs who have completed the Questionnaire

Argentina	Argentina Secretaría de Turismo Gobierno de la Provincia de Corrientes Subsecretaría de Turismo Gobierno del Chubut Secretaría de Turismo La Rioja Agencia Provincial de Turismo Municipalidad de Puerto Madryn Secretaria de Turismo y Deportes Municipalidad de La Costa Secretaría de Turismo Municipalidad de Ushuaia Secretaría de Turismo Provincia de Buenos Aires Secretaría de Turismo y Deportes Provincia del Neuquén Subsecretaría de Turismo
Australia	Australian Tourism Commission Australia Capital Tourism Corporation Blue Mountains Tourism Ltd Brisbane Marketing Cairns City Council Canberra Convention Bureau Gold Coast Convention Bureau Combination of Kimberley Tourism Association/Pilbara Tourism and Convention Bureau Melbourne Convention + Visitors Bureau Northern Territory Tourist Commission Perth Convention Bureau Tourism Queensland Tourism Sydney Tourism Tasmania Tourism Top End Tourism Tropical North Queensland Tourism Victoria
Austria	Austrian National Tourist Office Bregenzerwald Tourism Innsbruck Tourism Lech Zuers Tourism Salzburg City Tourist Office Salzburg State Board of Tourism Styrian Tourist Board Tirol Tourist Board Vienna Tourist Board
Bahrain	Bahrain Convention & Exhibition Bureau
Brazil	EMBRATUR - Instituto Brasileiro de Turismo Blumar Tourism Empresa de Turismo da Bahia S.A. BAHIATURSA Iguassu Convention & Visitors Bureau Paraná State Tourism Authority - PARANATUR Porto Alegre Convention & Visitors Bureau Recife Convention & Visitors Bureau Rio Convention & Visitors Bureau São Paulo Conventions & Visitors Bureau
Canada	Association touristique régionale de Duplessis Association touristique régionale de la Gaspésie



	<p>Association Touristique régionale de L'Outaouais Cambridge Tourism Convention & Visitors Bureau of Windsor, Essex County & Pelee Island Destination Halifax Destination Winnipeg Inc. Fredericton Convention & Visitors Bureau Greater Montreal Convention & Tourism Bureau Greater Vancouver Convention and Visitors Bureau Ottawa Tourism & Convention Authority Nova Scotia Department of Tourism and Culture Red Deer Visitor & Convention Bureau Southern Ontario Tourism Organization Toronto Convention & Visitors Association Tourism Calgary (CCVB) Tourism Whistler Tourism Niagara - Niagara Economic and Tourism corporation Tourism Burlington Tourisme Centre-du-Québec Tourism Quebec Travel Alberta Travel Manitoba Yukon Tourism Marketing Partnership</p>
Caribbean Responded	<p>Caribbean Tourism Organization Cayman Islands Department of Tourism Curaçao Tourist Board Jamaica Tourist Board Puerto Rico Tourism Company St Lucia Tourist Board St Vincent and the Grenadines Department of Tourism</p>
China	<p>Hong Kong Tourism Board Yunnan Provincial Tourism Bureau Taiwan Tourism Bureau, Ministry of Transportation and Communications</p>
Ecuador Responded	<p>Ministry of Tourism - Undersecretary of Tourism Camara provincial de Turismo del Guayas Camara Provincial de Turismo de Galapagos (CAPTURGAL) Quito Metropolitan Corporation of Tourism</p>
Egypt	<p>La Playa Taba Resort</p>
Finland	<p>Finnish Tourist Board Åland Tourist Information Office Central Finland - Holiday Finland City of Tampere - Touristbureau Espoo Convention & Marketing Northern Lapland Travel Ltd</p>
France	<p>Maison de La France Bordeaux Gironde Convention Bureau Comité Départemental du Tourisme de l'Aveyron</p>



Comité Départemental du Tourisme du Calvados
 Comité du Tourisme de la Réunion
 Comité Régionale du Tourisme d'Ile-de-France
 Comité Régional du Tourisme de Bretagne
 Comité Régional du Tourisme de Bourgogne
 Comité Régional du Tourisme de L'Alsace
 Comité Régional du Tourisme de Normandie
 Comité Régional du Tourisme Languedoc-Rousillon
 Comité Régional du Tourisme Midi-Pyrenees
 Nouvelles-Caledonie Tourisme Point Sud
 Office du Tourisme de Paris
 Office du Tourisme et de Congres de Nice
 Office du Tourisme d'Aix-en-Provence
 Office de Tourisme et des Congres Antibes Juan-les-Pins
 Office de Tourisme de Grenoble
 Office de Tourisme de Nantes Atlantique
 Office du Tourisme de Saint-Tropez
 Office du Tourisme et des Congrès de Saint-Etienne

Germany (25)

German National Tourist Board
 Bayern Tourismus Marketing GmbH (Bavaria)
 Black Forest Tourist Board Ltd
 Dresden Werbung & Tourismus GmbH
 Düsseldorf Marketing & Tourismus GmbH
 Frankfurt am Main Tourismus+Congress GmbH
 Köln Tourismus Office
 Leipzig Tourist Service e.V.
 Region Bonn Tourismus & Congress GmbH
 Tourismus Marketing Gesellschaft Sachsen mbH (Saxony)
 Thüringer Tourismus GmbH
 Tourismusverband Mecklenburg-Vorpommern e.V.
 Verkehrsverein Bad Aachen e.V.

India

Ministry for Culture and Tourism - Government of India
 Indiatourism Bhubaneswar (Orissa)

Indonesia

Maya Ubud Resort

Ireland

Tourism Ireland
 Cork Kerry Tourism
 Dublin Regional Tourism Authority Ltd
 South East Tourism

Italy

Assessorato Provinciale al Turismo de Bologna
 Assessorato Regionale al turismo de Toscana
 Assessorato Regionale al turismo de la Valle d'Aosta
 Azienda di Promozione Turistica del Comune di Roma
 Azienda di Promozione Turistica de Pisa
 Azienda di Promozione Turistica de Venezia (Venice)
 Turismo Torino

Malaysia

Labuan Tourism Action Council
 Langkawi Tourism Action Council

Maldives

Maldives Tourism Promotion Board
 Mirihi Island Resort



Malta	Malta Tourism Authority
Mexico	<p>Acapulco Convention and Visitors Bureau Comité de Turismo y Convenciones de Tijuana Dirección de Turismo del Estado de Durango Leon Convention & Visitors Bureau Oficina de Convenciones y Visitantes de Puebla Oficina de Convenciones y Visitantes de Tabasco Puerto Vallarta Convention and Visitors Bureau Secretaría de Desarrollo Turístico del Estado de Oaxaca - SEDETUR Secretaría de Fomento al Turismo del Estado de Sonora Secretaría de Turismo del Estado de Morelos Secretaría de Turismo del Estado de Puebla Secretaría de Turismo del Estado de Yucatán Sub-Secretaría de Comercio y Turismo del Estado de México Veracruz Oficina de Visitantes y Convenciones</p>
Morocco	Conseil Regional de Tourism de Fes
Netherlands	<p>Netherlands Board of Tourism Amsterdam Tourist Board BV Region Eindhoven Convention Bureau Utrecht Convention Bureau</p>
New Zealand	<p>Tourism New Zealand Christchurch & Canterbury Marketing Destination Fiordland Destination Manawatu Destination Queenstown Hawke's Bay Tourism Positively Wellington Tourism Tourism Bay of Plenty Tourism Coromandel Tourism Dunedin</p>
Seychelles	Seychelles Tourism Marketing Authority
Slovenia	<p>Slovenian Tourist Board Ljubljana Tourist Board Maribor Tourist Board Bohinj Tourist Board</p>
South Africa	<p>South African Tourism Cape Town Convention Bureau Gauteng Tourism Authority Johannesburg Tourism Company Knysna Tourism Tourism KwaZulu Natal Western Cape Tourism Board</p>
Spain	<p>Cordoba Patronato Provincial de Turismo Girona Convention Bureau Patronato de Turismo de Lanzarote Turgalicia, Sociedad de Imagen y Promoción Turística de Galicia, S.A.</p>



Ajuntament de Palma de Mallorca Seccion de Turismo
 Benidorm Tourist Board
 Bilbao Iniciativas Turísticas, S.A.
 Burgos Tourist Board
 Costa Daurada (Patronat de Turisme de la Diputació de Tarragona)
 Federacion Espanola de Municipios y Provincias (FEMP)
 Ibiza Tourist Board
 Jaen Tourist Promotion Board / Oficina de Promocion Turistica
 Oficina de promocion Turistica de la Diputacion de Barcelona
 Patronato Municipal de Turismo de Zaragoza Auditor
 Patronato Provincial de Turismo de Granada
 Patronato de Turismo de Gran Canaria
 Salamanca Tourist Board
 Torremolinos Tourist Office
 Turisme de Barcelona
 Turisme de Lleida
 Turismo Andaluz
 Turismo de Sevilla
 Valladolid Tourist Board

Sweden

Gotlands Turistförening
 Länsurismen i Örebro län
 Mitt Sverige Turism
 Norrbotten/Lappland
 Sörmlandsturism
 Stockholm Visitors Board AB
 Uppsala Tourism AB

Thailand

Phulay Beach Krabi Aprime Resort

UK

VisitBritain
 Aberdeen & Grampian Tourist Board
 Angus & Dundee Tourist Board
 Ayrshire & Arran Tourist Board
 Bath Tourism Plus
 Brighton & Hove Visitor & Convention Bureau
 Bristol Tourism & Conference Bureau
 Causeway Coast and Antrim Glens
 Cheltenham Tourism
 Dumfries & Galloway Tourist Board
 Edinburgh & Lothians Tourist Board
 English Riviera Tourist Board
 Experience Nottingham
 Greater Glasgow & Clyde Valley Tourist Board
 Highlands of Scotland Tourist Board
 Jersey Tourism
 Leicester Shire Promotions Ltd
 Marketing Birmingham
 Marketing Manchester
 Mid Wales tourism partnership
 Newcastle Gateshead Convention Bureau
 Northumbria Tourist Board
 North Wales Tourism Partnership
 Scottish Borders Tourist Board
 South Warwickshire Tourism



South West Tourism
Sperrins tourism
The Mersey Partnership
Visit Heart of England
Visit London
VisitScotland
Wales Tourist Board
Western Isles Tourist Board
Yorkshire Tourist Board





World Tourism Organization Global Study of DMOs

Thank you for your assistance in completing this questionnaire. By doing so you are helping WTO to develop a reliable basis of knowledge about the structure, scale, status, activities, resources and priorities of Destination Management Organisations (DMOs) throughout the world.

1 Which one of the following terms best describes the role of your organisation?

(Tick one)

- Regional, provincial/state tourist organisation
- City tourism organisation
- Ski or other sports resort organisation
- National Tourism Organisation (NTO)
- Coastal resort organisation
- National Tourist Authority (NTA)
- Other *(please write in)* _____

2 Which one of the following best describes the status of your organisation? *(Tick one)*

- A department of regional, provincial/state or local government organisation
- An agency accountable to national government
- A 'not for profit' public-private partnership
- A profit-driven commercial company
- An agency accountable to a regional, provincial/state or local government organisation
- A 'not for profit' association of tourism businesses
- A national government department
- Other *(please write in)* _____

3 How much was your organisation's last annual overall budget including staffing and overheads? *(Tick one)*

- Up to US\$500,000
- US\$500,001 – 750,000
- US\$750,001 – 1million
- US\$1-1.5 million
- US\$1.5-5 million
- US\$5-10 million
- US\$10-15 million
- More than US\$15 million



4 What percentage of this budget comes from each of the following sources?
(please write in percentage against each item)

%

- National Government
- Regional, provincial/state or local government
- Hotel tax or other specific indirect tax
- Membership fees from tourism businesses
- Activity related or advertising income from tourism businesses
- Other (Please write in) _____

5 How many staff work within your organisation? – Please indicate the full time equivalents (ie 2 half time = 1 full time) ? (Tick one)

- Up to 10
- 11-20
- 21-30
- 31-40
- 41-50
- 51- 100
- 101 –150
- More than 150

6 How much was your organisation's marketing budget for 2003, excluding staff and overheads? (Please tick one)

- Up to US\$100,000
- US\$100,001 to 200,000
- US\$200,001 to 300,000
- US\$300,001 to 500,000
- US\$500,001 to 1 million
- US\$1 to 5 million
- US\$5 to 10 million
- More than US\$10 million

7 How many tourism beds are available within your area? (Please tick one)

- Up to 500
- 501-1000
- 1001 – 2000
- 2001 – 3000
- 3001 – 5000
- 5001 – 10,000
- 10,001 – 20,000
- 20,001 – 50,000
- More than 50,000

8 Of which international organisations is your organisation a member? (Please tick each organisation that your organisation holds membership for)

- World Tourism Organization
- Pacific Asia Travel Association
- European Travel Commission
- European Cities Tourism
- International Association of Convention and Visitor Bureaus
- Other (please write in) _____



9 Is your organisation's performance evaluated quantitatively?

- Yes
- No

10 How is your organisation's performance evaluated? (Please write in)

11 Which promotions and marketing activities have you undertaken in the last 3 years? And which do you anticipate undertaking in the next 3 years? (Please tick as many activities as appropriate in both columns)

Last 3 years	Next 3 years	
<input type="checkbox"/>	<input type="checkbox"/>	Production and distribution of brochures and print
<input type="checkbox"/>	<input type="checkbox"/>	International market planning
<input type="checkbox"/>	<input type="checkbox"/>	Domestic market planning
<input type="checkbox"/>	<input type="checkbox"/>	International advertising
<input type="checkbox"/>	<input type="checkbox"/>	Domestic advertising
<input type="checkbox"/>	<input type="checkbox"/>	Operation of a web site
<input type="checkbox"/>	<input type="checkbox"/>	Direct mail
<input type="checkbox"/>	<input type="checkbox"/>	Email marketing
<input type="checkbox"/>	<input type="checkbox"/>	Customer relationship management (CRM)
<input type="checkbox"/>	<input type="checkbox"/>	Travel exhibitions, fairs and trade shows - organisation
<input type="checkbox"/>	<input type="checkbox"/>	Organisation of other events
<input type="checkbox"/>	<input type="checkbox"/>	Travel exhibitions, fairs and trade shows - attending
<input type="checkbox"/>	<input type="checkbox"/>	Marketing to the travel trade
<input type="checkbox"/>	<input type="checkbox"/>	Convention Bureau operations
<input type="checkbox"/>	<input type="checkbox"/>	Market research
<input type="checkbox"/>	<input type="checkbox"/>	Other (Please write in) _____
<input type="checkbox"/>	<input type="checkbox"/>	None of these

12 Other marketing and promotion activity not on this list? (Please write in)

Last 3 years _____
Next 3 years _____

13 Which of the following types of tourism information collection activities has your organisation you undertaken in the last 3 years? And which do you anticipate undertaking in the next 3 years?

Last 3 years	Next 3 years	
<input type="checkbox"/>	<input type="checkbox"/>	Collection of a wide range of tourist information, including accommodation
<input type="checkbox"/>	<input type="checkbox"/>	Operation of an information/content management system
<input type="checkbox"/>	<input type="checkbox"/>	Operation of Information Centres for visitors
<input type="checkbox"/>	<input type="checkbox"/>	Other (Please write in) _____
<input type="checkbox"/>	<input type="checkbox"/>	None of these

14 Other tourism information collection activity not on this list? (Please write in)



Last 3 years _____
Next 3 years _____

15 Which of the following types of reservation services has your organisation itself provided in the last 3 years? And which do you anticipate undertaking in the next 3 years? Please also indicate if these are or will be outsourced rather than delivered by your organisation

Last 3 years	Next 3 years	Out- sourced	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provision of a reservation service through Information Centres
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provision of a reservations service to telephone callers
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Provision of a live (real-time) web based reservation service
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other <i>(Please write in)</i> _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None of these

16 Other reservation services not on this list? *(Please write in)*

Last 3 years _____
Next 3 years _____

17 Which of the following product-related activities have you undertaken in the last 3 years? And which do you anticipate undertaking in the next 3 years?

Last 3 years	Next 3 years	
<input type="checkbox"/>	<input type="checkbox"/>	Package development and operation
<input type="checkbox"/>	<input type="checkbox"/>	Classification and/or licensing of tourism businesses
<input type="checkbox"/>	<input type="checkbox"/>	Development of physical resources such as visitor centres, signage etc
<input type="checkbox"/>	<input type="checkbox"/>	Regulation of the industry
<input type="checkbox"/>	<input type="checkbox"/>	Human resource development and vocational training
<input type="checkbox"/>	<input type="checkbox"/>	Advice and/or finance to assist tourism businesses
<input type="checkbox"/>	<input type="checkbox"/>	Other <i>(Please write in)</i> _____
<input type="checkbox"/>	<input type="checkbox"/>	None of these

18 Other product related services not on this list? *(Please write in)*

Last 3 years _____
Next 3 years _____

19 Does your organisation have a strategy for the implementation of e-business?

Yes
 No
(If No please skip to Question 22)

20 Is this e business strategy leading to substantial changes in the way your organisation works?

Yes
 No
 Don't know



21 How well advanced are you in implementing your e-business strategy?

- Not started
- Less than half way
- More than half-way
- Complete

22 Please list in descending order the five most important activities your organisation undertakes, in your opinion

23 Please tell us the importance to your organisation of the following services that might be provided by international tourism organisations (Tick one column for each service)

	Very important	Important	Moderately important	Not very important	Not at all important	Don't know
Provision of an international or global Web portal						
Market research						
Publication of international tourism trends						
Development of international product standards						
Other international marketing initiatives						
Development of standard tourism terminologies and concepts						
Training						

24 Does your destination provide any 'best practice' examples of destination management or marketing, from which other destinations could learn?

- Yes
 - No
- (If No please skip to Question 27 on the next page)*



25 What types of best practice examples would you like to share? (Please write in)

26 May we contact you again for further information about best practice examples?

- Yes
- No

27 With which of these statements do you agree? (Please tick one answer, the individual answers to this question remain confidential even if you opt to display an individual profile at the end of this questionnaire.)

- The tourism structure in my country works very well all the time
- The tourism structure in my country works well most of the time
- The tourism structure in my country sometimes does not work well
- The tourism structure in my country works badly

28 Please tell me how much you agree or disagree with each of the following statements

	Agree strongly	Agree	Neither agree nor disagree	Disagree slightly	Disagree strongly
It is not good use of public money to promote destinations					
Tourism businesses should lead in promoting destinations					
A public private partnership is the best way to promote and organise destinations					
The public sector is often out of touch with the way the industry actually works					
Tourism development, management, marketing and promotion should be managed within an integrated structure					
The public sector should take the lead in promoting destinations					

