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Operationalisation of Destination Management Organisations in Romania.

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Operationalisation of Destination Management Organisations in Romania

This report provides an analysis of the state of play for tourism in Romania and examines opportunities and challenges for destination development at the subnational level. In addition, it includes an operating manual providing practical guidance for tourism practitioners, setting out the steps required to establish and operate an effective DMO. It has been produced to help public and private sector stakeholders in Romania to work in partnership to plan, develop, manage and market their destinations. The aim is to strengthen tourism structures at local, regional and national levels, so that Romania is able to compete effectively in international markets, in a way that will bring maximum benefit to the country and its destinations. Examples of international best practices, and recommendations to develop an effective and self-sustaining network of regional DMOs are also presented.

Keywords: destination management organisation, tourism, Romania, regional development, regional attractiveness, tourism promotion, marketing

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The report was co-ordinated and edited by Peter Haxton, Policy Analyst (CFE), under the supervision of Alain Dupeyras, Head of the Regional Development and Tourism Division (CFE), and Jane Stacey, Head of the Tourism Unit (CFE), and with the support of Anna Bolengo, Consultant (CFE), who undertook substantial co-ordination, drafting and editing. Laetitia Reille, Statistician (CFE), managed statistical information tables. Monserrat Fonbonnat, Assistant (CFE), provided administrative support. Pilar Philip (CFE) served as publication co-ordinator.

This report was produced in close collaboration with the former Ministry of Tourism, now the Ministry of Economy, Energy and Business Environment in Romania. From the Ministry, it benefited from the comments and contributions of Camelia Tărniceru, Mihaela Parteca, and Manuela Liliana Muresan, who played an essential co-ordination role. The report benefitted from significant contributions, feedback and guidance from the European Commission, in particular from Iulia Serban and Valentin Ariton.

The diagnostic component of the report was drafted by Aidan Pender, Aidan Pender Consulting, and the operating manual was drafted by Roger Carter, Managing Director, TEAM Tourism Consulting, with significant inputs from the Secretariat. In addition, the report benefitted from contributions and feedback provided by OECD colleagues in the Centre for Entrepreneurship, SMEs, Regions and Cities (CFE).

The report benefitted from significant contributions, feedback and guidance from policy makers from OECD member countries and partner economies. It builds on responses to a survey and inputs from 132 respondents, including Romanian DMO-like organisations, County Councils, Local Councils, Tourism Information Centres, Regional Development Agencies, and tourism-related Ministries (Ministry of Education, Ministry of Agriculture and Rural Development, Ministry of Regional Development and Public Administration, Ministry of Business Environment). This report was informed by discussions at three technical workshops held in February 2019 in Bucharest, in May 2019 in Constanta, and in July 2019 in Brasov.

* This document was produced with the financial assistance of the European Union. The views expressed herein can in no way be taken to reflect the official opinion of the European Union.

Foreword

This report has been produced to help public and private sector stakeholders in Romania to work in partnership to plan, develop, manage and market their destinations with maximum effectiveness. It is intended for use by those who are setting up new Destination Management Organisations (DMOs) at local or county/regional[1] level; and for those who will be responsible for the operation of such DMOs in the future, whether as professional staff, members of governing boards or active stakeholders. The purpose is to strengthen the tourism structure at every level, local, regional and national, so that Romania is able to compete effectively in international markets, in a way that will bring maximum benefit to the country and its destinations.

The report has been developed in response to a request from the former Romanian Ministry of Tourism, now the Ministry of Economy, Energy and Business Environment (the Ministry), following the introduction of a new Destination Management Organisation (DMO) law (LAW no. 275 of November 23, 2018 regarding the approval of the Government Ordinance no. 15/2017 for amending and supplementing Government Ordinance no. 58/1998) regarding the organization and conduct of tourism activity in Romania. The introduction of the legal provision creates a range of challenges including a new organisational and co-operation model and supporting activities.

The diagnostic component incorporates an in-depth SWOT analysis (from a national and regional perspective), informed by regional capacity-building workshops held in Constanta and Brasov. Examples of international best practices, and recommendations[2] to respond to key challenges raised in order to develop an effective and self-sustaining network of regional DMOs are also presented.

The operating manual builds on and aligns with the diagnostic report, reviewing existing structures and circumstances in the Romanian tourism sector, and providing proposed responses to key opportunities and challenges.

The report provides practical guidance to tourism practitioners, setting out the steps required to establish and operate an effective DMO. The end result should be a strategic and co-ordinated system of destination management across Romania – one which is structured and consistent, with the opportunity to mobilise the financial and other resources necessary for sustainability.

[1] The term “regional” has a functional meaning in this context and is used exclusively to convey the practicalities of tourism destination management and development – i.e. a multi-county DMO structure that should be better resourced to operate as a high-performing tourism destination (as opposed to a single county structure). In this usage, the term “regional” has no administrative, political, or legal meaning.

[2] The report provides policy recommendations that the government of Romania is invited to consider in its future work on the establishment of destination management organisations in Romania.

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Part I Diagnostic component

1. Introduction

Following the introduction of legal provisions on DMOs in the ordinance regulating tourism activities (275/2018), the Romanian Ministry of Tourism, now the Ministry of Economy, Energy and Business Environment, requested the assistance of the OECD in addressing the consequential challenges arising in relation to developing new organisational structures and the development of new working partnerships involving both public and private agencies. This work was subsequently undertaken with the financial support of the European Commission's Structural Reform Support Programme (SRSP), which provides support for the preparation and implementation of growth-enhancing administrative and structural reforms in member states. The aim of this activity is to support public and private sector stakeholders to work together in partnership to develop an effective and self-sustaining network of Romanian Destination Management Organisations (DMOs) at sub-national level (Box 1.1).

Box 1.1. DMO Definition

The UN World Tourism Organization's (UNWTO) Committee on Tourism and Competitiveness (CTC) defines DMOs as :

> *The leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision. The governance structures of DMOs vary from a single public authority to a public/private partnership model with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and convention bureau activities.*
>
> *The functions of the DMOs may vary from national to regional and local levels depending on the current and potential needs as well as on the decentralization level of public administration. Not every tourism destination has a DMO.*

Tourism is typically an industry characterised by a great many small firms providing a wide array of tourism services. Because these firms are small, they tend to remain totally focused on their own business and they may lack the time, resources, and perhaps the expertise to look at the industry more widely. Consequently, they may fail to recognise opportunities for skills development, product development or innovation, and market development. They may also fail to understand the business and training supports that might be available to them.

A DMO can help to fill these gaps. A well-functioning DMO will act as a local "tourism broker" that brings together a range of organisations – tourism firms, public sector bodies, business associations, regulatory bodies, universities and technical colleges, marketing associations, local NGOs, and media organisations – and mobilises them to work together in their local or regional area to ensure that their coordinated and combined efforts produce a stronger and economically more valuable outcome for the tourism sector in the destination.

A DMO will do this by brokering linkages between local stakeholders. In practice, this will mean building effective vertical and horizontal linkages between the government sector, the business sector, and the community and NGO sector.

Prevailing commentary on the operational focus of DMOs tends to contrast narrow and broad interpretations of how the organisation should function. Contemporary opinion, generally supported by practices in OECD countries, tends to emphasise the broader functional view rather than an earlier understanding that a DMO was in effect solely a marketing entity. This contemporary and more managerialist view suggests that a DMO should be concerned with tourism development in its widest sense – involving product development, people development, experience development, promotions, sales, and marketing, and the physical development, appearance, and presentation of the destination itself as it is encountered by the visitor. This broader view, based on destination management in addition to marketing, is the approach adopted in the development of this report on the Operationalisation of DMOs in Romania.

In addition to regional capacity-building workshops held in Constanta and Brasov, the primary output from this activity is a consolidated report including a diagnostic component (reviewing existing structures and circumstances in the Romanian tourism sector, and providing recommendations in response to key opportunities and challenges), and a DMO operating manual (setting out the steps required to establish and maintain a functioning DMO network). Presented as an annex to the report, a DMO roadmap outlines the necessary actions, roles and indicative timeline to work towards the development of a network of Romanian DMOs.

Following the analysis of unique characteristics of the Romanian tourism sector, and extensive consultations with various stakeholder groups, the following key points in relation to the development of an effective network of DMOs at subnational level have been identified, which are further developed within the body of the report (Box 1.2).

Box 1.2. Towards a Tourism DMO Network in Romania

- **Two-tier tourism DMO structure.** The size of Romania as a country and the scale of its tourism potential is such that it requires a two-tier tourism DMO structure below the national level. This two-tier structure could be referred to as “local” and “regional”. Regional DMOs should be designed to form an effective network.
- **Dynamic national-regional partnership.** This network of regional DMOs should coordinate with the Ministry of Economy, Energy and Business Environment as the lead national agency, in a strong and dynamic partnership to deliver aligned regional strategies with a particular focus on the development of international target markets.
- **Entrepreneurial culture.** These regional DMOs should operate on a fully professional basis, within an innovative, entrepreneurial ethos/culture. They should be guided by an evidence-based regional tourism strategy, focused on competitiveness in target markets, and including the establishment of an effective implementation structure, of which the DMO will form part.
- **Institutional support from RDAs.** Consideration could be given to inviting Regional Development Agencies (RDAs) to act as a ‘parent body’ upon the establishment of a DMO in their region. This would be consistent with the RDA focus on the development of SMEs and microenterprises. This would also provide some institutional support for the DMO, allow it to access research and business insight developed by the RDA, and to gain an understanding of the channels to EU funding.
- **Mapping of destinations.** The Ministry of Economy, Energy and Business Environment, the RDAs and all the relevant stakeholders in the destination, including the existing destination partnerships could work together to prepare a map of the optimum destination areas for ‘regional ’ DMOs. Depending on circumstances, DMOs could operate at the level of a single county or on the basis of a multi-county tourism cluster.
- **Authenticity preservation.** Local DMOs should focus on bringing all the key players together in a strong local destination management partnership, ensuring that Romania’s cities, towns, villages and countryside are attractive, authentic, and well-maintained places for visitors to spend time and money.
- **Four-year planning framework.** The development of the DMO network should be undertaken over a four-year planning framework, with a pilot exercise scheduled for the first year. This initial pilot could involve the establishment of two regional DMOs and four local DMOs.
- **Well-defined structural relationship.** The roll-out of the proposed sub-national network should be delivered over four years and managed with a consistent approach across the country, in terms of SMART objectives, mission, financial models, and governance. It should also be based on a well-defined structural relationship between the board who set policy, and the staff who implement it.

2 Recent tourism performance and planning in Romania

Tourism performance

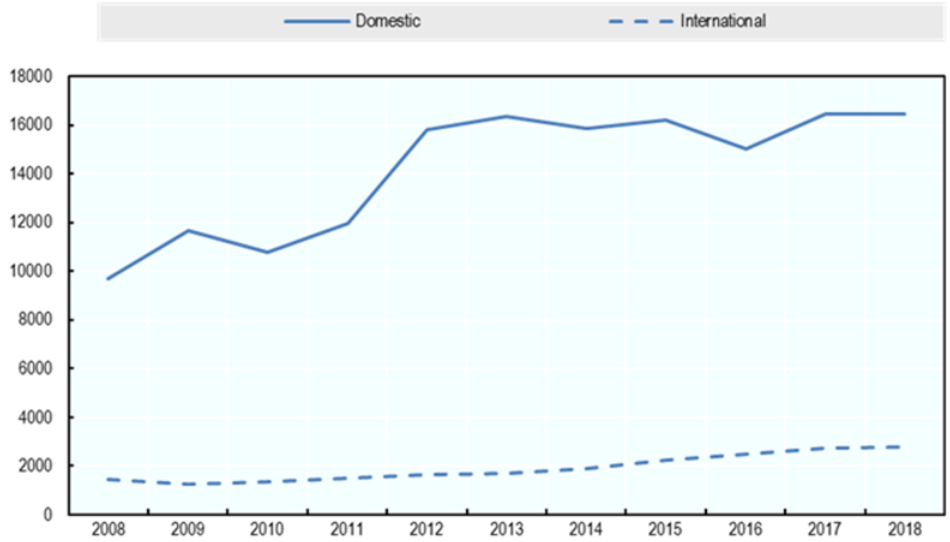
In 2017 tourism directly contributed 2.8% of GDP in Romania (RON 23.9 billion), compared to an average share of 4.2% in OECD countries. Tourism directly supported 373 074 jobs in 2017. Tourism employment represents around 4.0% of total employment, compared to an OECD average of 6.9%.

Romania enjoys some potential for expansion in the tourism sector before it catches up with mean values for tourism in the OECD. With strong support from the Ministry of Economy, Energy and Business Environment and the government more broadly, and based on areas with real tourism potential, it seems reasonable to believe that Romania should develop the capacity to reach OECD mean tourism values over the medium to longer term. Moving the national tourism policy focus to an increased emphasis on developing international tourism will be necessary to achieve tourism's potential as a driver of jobs and growth.

Visitor numbers

The international and the domestic overnight markets demonstrated strong growth over the period from 2008 – 2018, increasing from 1.6 million to 2.8 million (87% growth) and from 10 million to 16.5 million (65%) respectively (Figure 2.1).

Figure 2.1. Growth in International and Domestic Overnight Visitors 2008-2018 ('000s)



Source: OECD Tourism Database.

Total domestic trips have grown by 29% over the decade from 2009 to 2018 (Table 2.1). A notable feature is that overnight visitors in Romania are significantly outnumbered by same day visitors (also referred to as excursionists – visitors that stay less than 24 hours).

Table 2.1. Domestic Tourism 2009 – 2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total Domestic Trips (millions)		41	41	54	52	50	53	47	51	52
Overnight Visitors – tourists (millions)	12	11	12	16	16	16	16	15	16	16
Same Day Visitors (millions)		30	29	38	36	34	37	32	35	36
Nights – in all types of accommodation (millions)	15	13	15	16	16	17	10	21	22	23
Length of Stay (Nights)	1.3	1.2	1.2	1.0	1.0	1.0	1.2	1.4	1.3	1.4

Source: OECD Tourism Database, National Institute for Statistics, Survey of Tourism Demand of Residents, Occupancy of Accommodation Establishments

However, the ratio of day visitors to overnight visitors over the decade fell from a peak of 2.7 in 2010 to a low of 2.1 in 2018 (Table 2.2). Similarly, the ratio of international day visitors to international overnight visitors also decreased over the same period, from a relatively high 4.8 in 2010 to 3.2 in 2018 (a drop of 33%). These are encouraging trends, and should be monitored with the aim of repeating this performance over the next decade.

Table 2.2. Ratio of Day Visitors to Overnights 2010 – 2018

Day Visitors : Overnight	2010	2011	2012	2013	2014	2015	2016	2017	2018
Domestic	2.7	2.4	2.4	2.2	2.2	2.3	2.1	2.1	2.1
Inbound	4.8	4.1	3.6	3.6	3.4	3.2	3.1	3.0	3.2

Source: OECD

In most countries the majority of tourism expenditure is captured in the “evening economy” through spending in the hospitality sector (hotels, restaurants and bars), and through local entertainment and transport providers. By contrast, tourists who visit Romania to engage in activities (for example) such as hill-walking, cycling, or visiting archaeological sites, might not spend a great deal of money on these activities during the day. For most tourists these activities represent “primary demand” and so represent the principal reason a tourist has decided to visit Romania. Yet spending on these areas of “primary demand” is limited, and so for many destinations the challenge is to hold the interest and attention of the visitor into the “evening economy”- which in effect operates as a source of secondary demand. Secondary demand is where money is spent, where jobs are created, and where tourism can support local communities to become economically and socially sustainable.

A further point in this respect relates to “length of stay” as shown in Table 2.1. This indicates that in Romania, length of stay in the domestic tourism market has hardly changed in a decade and remains at a little above one overnight. Consequently, the challenge arising from this data is twofold:

- Romanian domestic tourism needs to convert more day visitors into overnight visitors
- Romanian domestic tourism needs to convert more one-night visitors into two- or three-night visitors.

From an international arrivals perspective, over the decade from 2009 to 2018 a 58% increase in total arrivals was recorded (Table 2.3). The length of stay has hardly changed over the decade – moving from 2.1 to 2.0 – indicating that although tourists are motivated to visit Romania for short breaks (approximately

two days), they have not yet been given a compelling reason to stay longer. This may also reflect a lack of long-haul tourists who tend to stay longer in a destination, but who need to be convinced that there is enough to see and do in the destination before committing to the cost and time of long haul travel.

Table 2.3. International Tourism 2009 – 2018

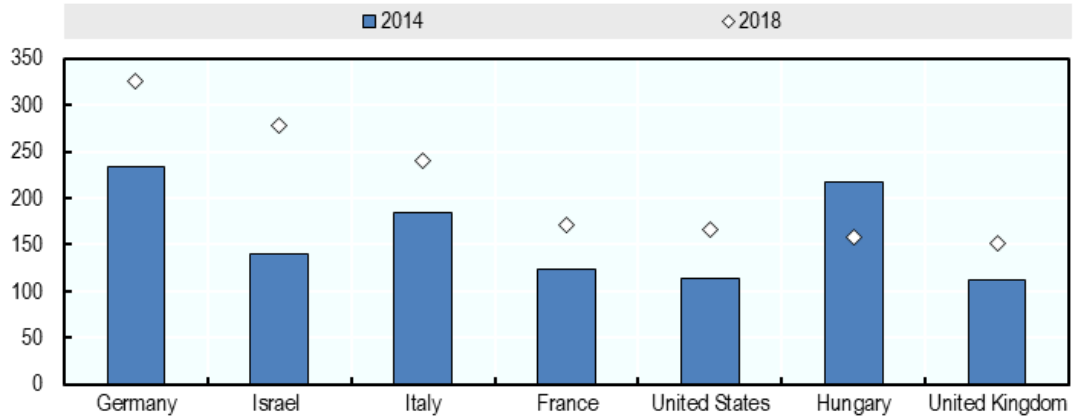
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total International Arrivals (millions)	7.6	7.5	7.6	7.9	8.0	8.4	9.3	10.2	10.9	12.0
Overnight Visitors – tourists (millions)	1.3	1.3	1.5	1.7	1.7	1.9	2.2	2.5	2.7	3.1
Same Day Visitors (millions)	6.3	6.2	6.1	6.2	6.3	6.5	7.1	7.7	8.2	8.9
Nights – all types of accommodation (millions)	2.7	2.7	3.1	3.3	3.5	3.8	4.5	4.8	5.3	5.3
Length of Stay (Nights)	2.1	2.1	2.1	1.9	2.1	2.0	2.0	1.9	2.0	2.0

Source: OECD Tourism database, National Institute for Statistics, International Travels registered at the Romanian Borders, Occupancy of Accommodation Establishments

This observation on inbound tourism in Romania merits some further comment. Domestic tourism is the fundamental platform upon which the industry operates. It represents the expression of consumer demand that sustains hotels, restaurants, bars, visitor attractions, as well as the land, sea and air access sectors that facilitate the movement of visitors around a particular destination. In economic terms, however, domestic tourism is essentially about moving existing money around an existing domestic economic framework. International visitors therefore are especially important as they validate the concept of tourism as an important part of the national "export economy", which supports new and additional economic activity that generates new jobs and helps to sustain local and resilient communities. Trade in tourism services generates significant value added in the global economy, and an important share of this value added remains in national economies, compared with overall exports. In OECD countries, on average 89% of non-resident expenditure results in domestic value added, directly and through backward linkages with the rest of the economy (OECD, 2019).

Considering the inbound visitor mix from 2018, 1.5 million visitors came to Romania from the top seven source markets (Figure 2.2), representing 48.5% of total international tourists Apart from these core markets, there are other markets which are "warm" to the idea of a holiday in Romania, and who are currently delivering between 75 000 to 150 000 visitors.

Figure 2.2. International Tourism: Top Source Markets 2014 to 2018 (Overnight) ('000s)



Source: National Institute for Statistics, International Travels registered at the Romanian Borders, Occupancy of Accommodation Establishments

This view is reinforced by the fact that the “top seven” source markets have in relative terms declined in recent years from representing 52% of all international visitors to Romania in 2014 to 48% in 2018 – a decline over of 9% over a five-year period.

The implication of this is that while the top seven markets remain a strong and primary source of visitors for Romanian tourism, and should remain a strong focus for international marketing, by 2018 over half of all inbound visitors were coming from “growth” markets outside the top seven. Although still a relatively minor change, this diversification into source markets of international scale represents a positive development. This would suggest that Romania is gaining traction in a number of other markets, which need to be better understood in terms of their capacity to deliver greater tourism growth in Romania.

Visitor numbers at county level

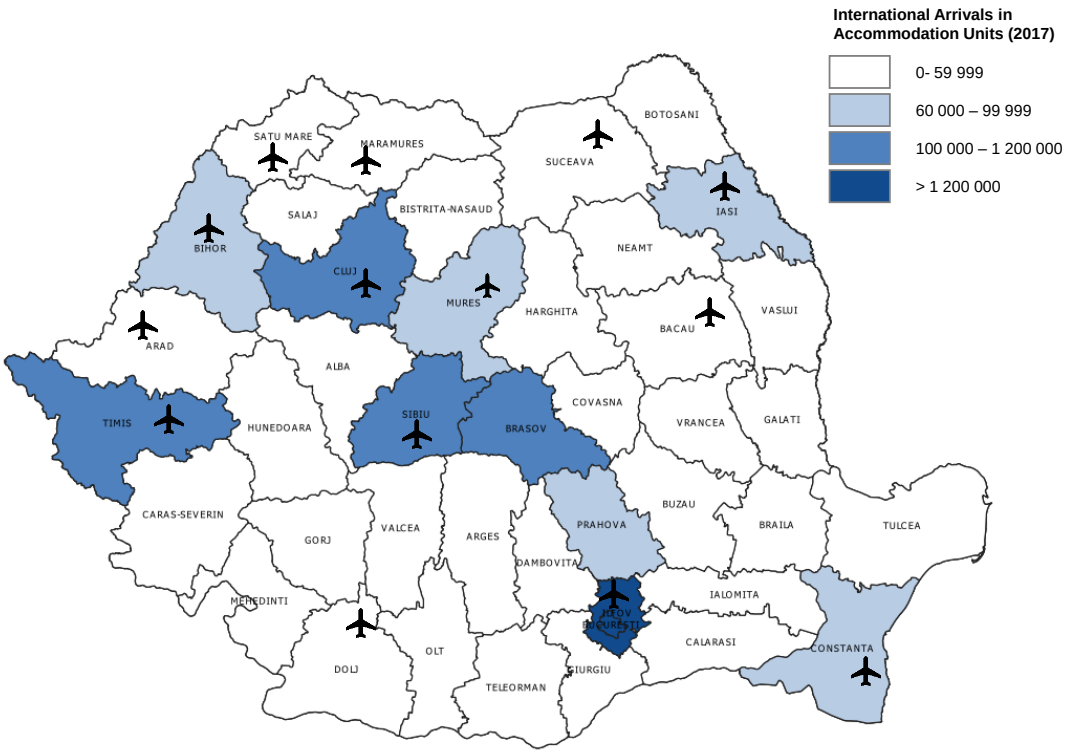
The spatial spread of visitors is an important aspect of any tourism diagnostic process**.** This facilitates an understanding of: i) where tourists visit and stay; ii) which areas are, relatively speaking, more “tourism-centric”; iii) which parts of the country are actually benefitting from expenditure in the local tourism economy; iv) what policy conclusions should be drawn by senior government decision-makers, and; v) what investment decisions should be made by entrepreneurs and business decision-takers.

In Romania, visitor numbers are very heavily clustered around Bucharest-Ilfov, which was visited by 46% of all visitors to Romania in 2017 (up 122% from 2007), and is by far the most tourism-centric location in Romania. It is likely that business tourism and the MICE sector also plays a significant role in Bucharest’s tourism dominance. As a significant European capital city, Bucharest is well positioned to attract corporate, business, and major entertainment events to the city to an extent that other cities in Romania may not.

The “top ten counties” for international arrivals are highlighted in Figure 2.3 which also presents those counties that have an airport. These counties are currently demonstrating a capacity to attract the attention of overseas visitors (accounting for 81.9% of total arrivals in accommodation) and are likely to possess the tourism asset base to grow these visitor numbers even further. Three in particular – Brasov (+94%), Cluj (+99%), and Bihor (+91%) – have demonstrated strong growth over the period 2007 – 2017. The task for tourism policy makers will be to consider how to support further tourism growth across the ten counties and beyond, and in so doing, re-balance somewhat the regional spread of further tourism development in the country.

It is in this context of considering how to support “further tourism growth” that the potential contribution of a sub-national DMO network must be assessed. An immediate and obvious action in this respect would be to look to the existing “winners”. In terms of further tourism growth, the top ten counties – or perhaps more effectively small groups of those counties joining together in a multi-county clustered DMO, could contribute to driving further expansion in the tourism sector. Equally some assessment must be made of those counties currently outside the “top ten” in order to establish whether they are fundamentally non-touristic locations or whether they possess undeveloped potential to deliver tourism experiences and contribute to the development of tourism in Romania.

Figure 2.3. Spatial distribution of international tourism arrivals in accommodation units (2017)



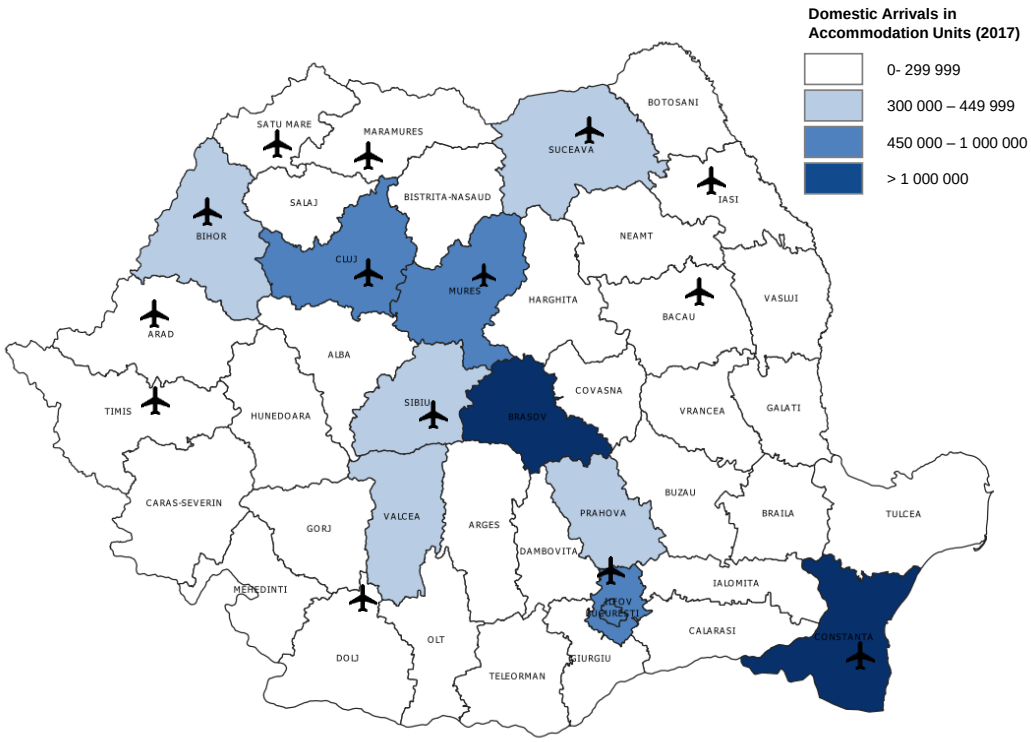
Source: OECD

With the top ten counties for domestic visitation accounting for only 65% of the total in 2017, domestic tourism is less concentrated than its international equivalent (Eight counties however are common to both the international and domestic "top ten" lists – Constanta, Brasov, Bucharest-Ilfov, Cluj, Mures, Prahova, Bihor and Sibiu). In terms of an immediate comparison between the international and domestic data sets, Timis and Iasi do not appear in the latter, and are replaced by Valcea and Suceava (Figure 2.4).

In order to sustain such a position of market dominance over a significant period of time, the top ten counties must enjoy some natural "comparative advantage" in the tourism sector over other counties in Romania. This may take the form of a naturally superior tourism asset base, a higher level of skills and professionalism in tourism service delivery, and/or a more creative and compelling marketing strategy than other counties.

This in turn prompts the observation that perhaps – in tourism development terms – not all counties are "tourism equivalent". Some may have more compelling advantages in natural and/cultural attractions, more sophisticated business systems than others, or better/more convenient transport connectivity. Such an observation could begin to inform the geographical and spatial shape of any future sub-national DMO network.

Figure 2.4. Spatial distribution of domestic tourism arrivals in accommodation units (2017)



Source: OECD

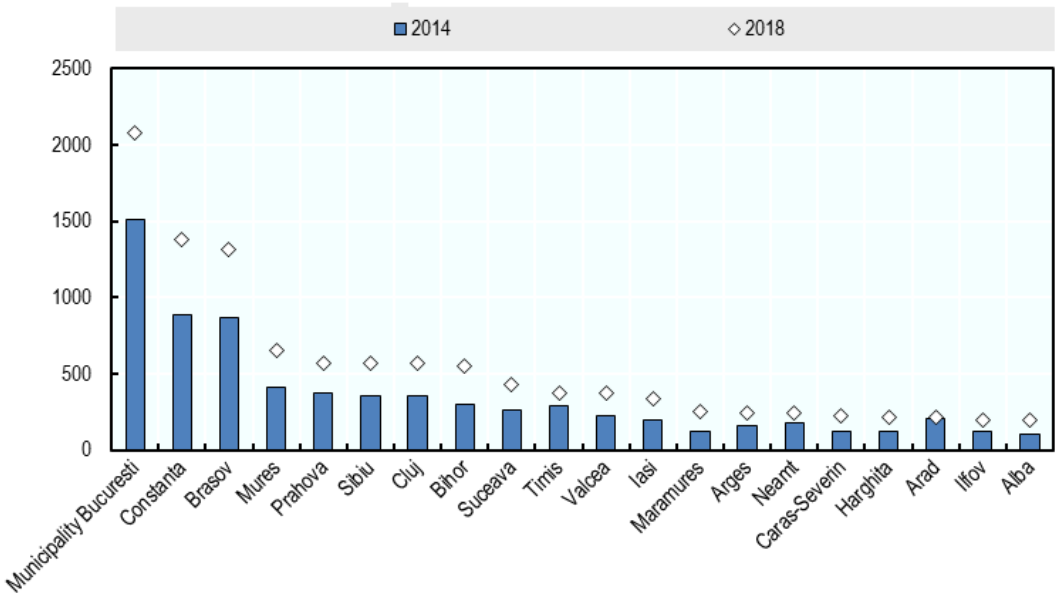
The maps show strong tourism-active central spine from the north-west of the country, through central Romania, and on to the south-east. The implication of the spatial pattern is that these counties should be at the top of the consideration set, as the implementation phase of DMO development gets underway.

A final note on this data relates to infrastructure and air transport connectivity. If Bucharest is ommitted from the analysis, there are thirteen regional airports in Romania. Of these thirteen, seven are in location that do not appear on the domestic top ten list, and six are in location that do not appear on the international top ten list. Approximately 50% in each case. The conclusion drawn from this analysis is that while strong regional air transport connectivity is often presented as a requirement for regional tourism development, it cannot of itself produce increased tourism visitor numbers. These are more likley to be driven by a strong tourism asset base. Transport connectivity is a central concern in tourism policy development, but in the absence of a strong tourism asset base, connectivity alone may not deliver the anticipated tourism growth. This is certainly an important consideration in terms of regional tourism development.

Drawing on other available data, some further aspects of tourism activity at county level can be examined. Figure 2.5 presents data for all tourists (domestic and international) for the period 2014 to 2018. Figure 2.6 presents a count of hotel stock across the top twenty counties, while *Source:* OECD, Ministry of Economy, Energy and Business Environment, County Level Statistics

Figure 2.7 presents a similar ranking for tourism employment. A set of seven counties consistently appear in the top ten while a set of fourteen appear in the top twenty counties for each. This is to be expected as there is a very close correlation between the three variables chosen – visitor numbers, hotels, and employment. There is an inevitable clustering effect that gives a sense of “tourism density” in these locations, as over time visitor numbers drive demand for accommodation (hotels) and the development of hotels drives demand locally for labour.

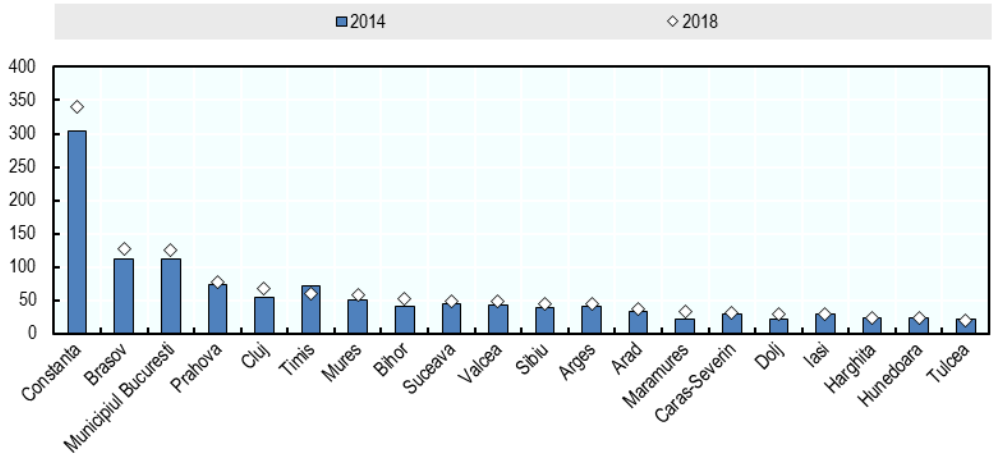
Figure 2.5. Total Visitors in Romania by County 2014 – 2018 ('000s)



Source: Ministry of Economy, Energy and Business Environment, County Level Statistics

Not all Romanian counties are tourism equivalent. This is the case in most countries. High performing tourism counties share common attributes – they are fortunate to possess a strong asset base rooted in the three core tourism resources of natural heritage, built heritage, and cultural heritage. Over time, hotels are built in the locations that tourists visit – workers are employed in the locations where tourists visit and in which hotels have been built. The individual sovereign consumer[3], making travel decisions based on the features that they find interesting in a particular country (as opposed to where a Tourist Board may wish to send them), essentially shape the resultant outcomes in terms of tourism density or tourism paucity.

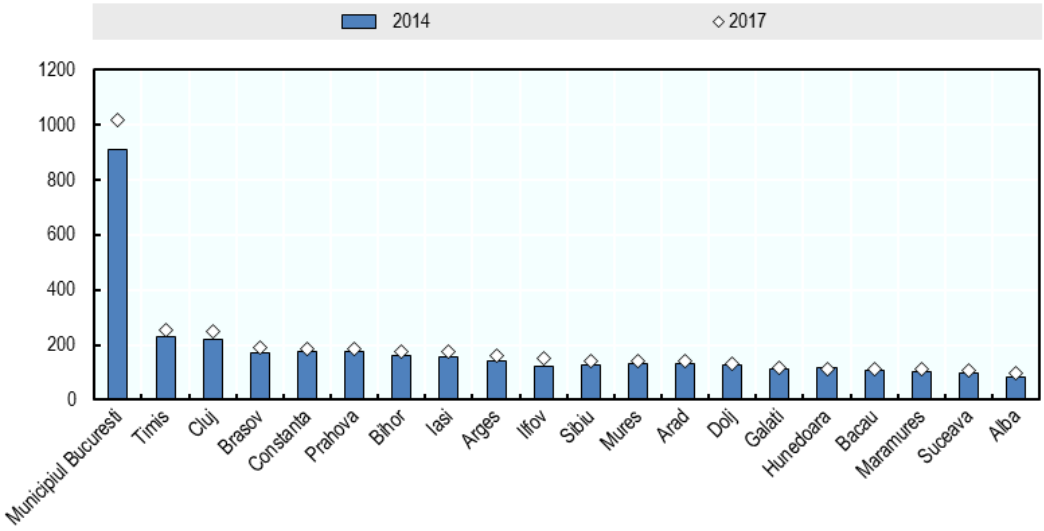
Figure 2.6. Total Hotel Stock in Romania by County 2014 – 2018 ('000s)



Source: OECD, Ministry of Economy, Energy and Business Environment, County Level Statistics

[3] Consumer Sovereignty: the situation in an economy where the desires and needs of consumers essentially influence, direct, and control the output of producers

Figure 2.7. Total Tourism Employment in Romania by County 2014 – 2017 ('000s)



Source: OECD, Ministry of Economy, Energy and Business Environment, County Level Statistics

Tourism planning

The current tourism plan for Romania is the *Romanian National Tourism Master Plan 2007-2026*. This plan was produced in 2006, and at that time the Romanian government commissioned the United Nations World Tourism Organisation (UNWTO) to undertake the compilation of the tourism plan. It was subsequently noted that an earlier master plan had been produced in 1996 but that "*much to the frustration of stakeholders in the tourism sector, its recommendations were never implemented*"[1]. The 2007-2026 plan was developed in order to align with the EU structural funds which Romania was eligible to receive following its accession to the EU in January 2007.

Within the 2007 Master Plan, Romania is positioned in a comparator set of countries for a number of factors, one of which is competitiveness, which can be defined as "the set of institutions, policies and factors that determine the level of productivity of a country"[2]. This is based on analysis prepared by the World Economic Forum (WEF) and is presented in Table 2.4. Competitiveness Ranking for Selected Countries (2007 versus 2017)

Table 2.4. Competitiveness Ranking for Selected Countries (2007 versus 2017)[3]

Country	2007 Ranking	2017 Ranking
Bulgaria	54	45
Croatia	38	32
Czech Republic	35	39
Hungary	40	49
Romania	**76**	**68**
Ukraine	78	88

Source: World Economic Forum Global Competitiveness Report 2017

Romania is one of three countries from this comparator set to have improved its overall competitiveness position over the period 2007 to 2017, albeit that it occupies a space within the latter half of this group. The overall score of 68 for Romania in 2017 is a composite of fourteen separate "pillars" which are used

to determine an aggregate outcome. Individual scores across these fourteen pillars are presented in Table 2.5. The scores show that in seven out of these fourteen measures, Romania is positioned in the latter half of the distribution across 136 countries. One of these - Prioritisation of Travel and Tourism, which measures the extent to which the government actively promotes and orchestrates the development of the travel and tourism sector - is in the bottom quartile; a further five pillars - Human Resources and Labour Market, Business Environment, Price Competitiveness, Air Transport Infrastructure, Ground and Port Infrastructure – are in the third quartile. Whilst it is acknowledged that some degree of qualitative judgement is involved in arriving at these outcomes, the scores may provide some insight into recent tourism performance in Romania. It is notable that in respect of prioritisation of tourism, human resources, and infrastructure, the SWOT analysis presented later in the diagnostic tends to support the challenges identified in these particular areas.

Table 2.5. Pillar Scores for Romania (2017)

Pillar	Rank (out of 136)	Pillar	Rank (out of 136)
International Openness	45	Price Competitiveness	85
Prioritisation of Travel & Tourism	108	Environmental Sustainability	43
ICT Readiness	60	Air Transport Infrastructure	82
Human Resources and Labour Market	81	Ground and Port Infrastructure	92
Health and Hygiene	31	Tourist Service Infrastructure	62
Safety & Security	39	Natural Resources	68
Business Environment	76	Cultural Resources & Business Travel	46

Source: World Economic Forum Global Competitiveness Report 2017

In terms of the *Romanian National Tourism Master Plan 2007-2026* it is not clear to what extent the objectives of that plan have been realised to date, however, the establishment and development of destination management organisations was not highlighted as a key element. The Ministry of Economy, Energy and Business Environment has indicated that the current Master Plan will soon be superseded by a new national tourism strategy, building on the current Plan and informed by other relevant public policy documents.

It is understood that this national tourism strategy has now been finalised, although it has not yet been circulated more widely or released into the public domain. Commentary on tourism planning and plan execution in Romania is limited and is largely confined to a number of academic commentators with an interest in tourism development. Other commentators suggested that the Master Plan was aimed primarily at public bodies and had little guidance to offer the private sector. Some have pointed to what they consider to be legal factors that can frustrate tourism planning and development. One report noted that *"the existing legal regime is over-crowded with normative acts and in urgent need of a new vision of Romanian tourism and a legal frame"*[4]. This would appear to suggest that an emphasis on legal precision in the establishment of DMOs, should not be so absolute that it suffocates the capacity of these DMOs to behave in a nimble and tactical manner in their subsequent business operations.

Some implications of this analysis for the establishment of DMOs to help achieve tourism's potential as a catalyst for jobs and growth in Romania, are summarised in Box 2.1:

Box 2.1. Considerations for the Establishment of DMOs in Romania

- In 2018 Romania had 16.5 million domestic overnight visitors and 2.5 million international overnight visitors. As in many OECD countries, the industry is significantly dependent on the domestic market.
- In terms of economic development in Romania, a focus of tourism policy – and of DMO development as a delivery channel for that policy - must be to attract more international arrivals and convert more international day visitors to overnight visitors.
- In so far as possible, DMOs should be designed on the basis of compelling tourism consumer propositions rather than local administrative boundaries.
- Where a single county cannot sustain a wider tourism proposition, it should consider working closely with a neighbouring county/ies to develop a suite of tourism products and services with the potential to attract a critical mass of domestic and international visitors. This process may benefit from the development of a multi-county clustered DMO based on that wider geography.
- Due to the need for critical mass, DMO's based on local administrative (council) boundaries, should only be considered for those counties currently established as domestic and/or international destinations (e.g. top twenty counties).
- Not all Romanian counties are tourism equivalent, as is the case in most countries. High performing tourism counties share common attributes – they are fortunate to possess a strong asset base rooted in the three core tourism resources of natural heritage, built heritage, and cultural heritage. The top-ten Romanian counties possess these assets – those at the bottom of the 41-county table most likely do not.
- In terms of developing a sub-national network of regional DMOs it would seem reasonable to expect that in the first wave of DMO development over the next four years, that no more than two regional (county or multi-county) and four local DMOs (either based on a tourism proposition or a local administrative boundary) should be approved each year for investment and development in the initial pilot phase.

3 Context and challenges

Legal and governance

The current legal framework governing DMOs in Romania is described below (Box 3.1).

Box 3.1. Romanian Tourism Law – relevant sections for DMOs

Key legal provisions on DMOs:

- Tourism destination - area with a variety of tourist products, having a unitary and coherent marketing image, having a general and specific service network that contributes to the development of tourism products
- Destination Management Organization is a legal entity, which carries out the policy of the tourist development of the destination, including the destination marketing policy, in accordance with the legal provisions in force; "
- The Destination Management Organization shall be established by associating the local public authority of the destination with special taxpayers for tourism promotion, respectively:
  - members from the destination of representative employers' confederations / federations, with activities in the field of tourism;
  - owners' organizations;
  - employers within the tourist destination.
- The decisions of the members, paying the tourist promotion tax, in order to fulfil the objectives of the Management Organization of the tourist Destination, shall be taken by vote, in proportion to the amount of the tourist promotion fee established and paid.
- The local councils, the county councils and the General Council of the Municipality of Bucharest respectively have the following responsibilities in the field of tourism:
  - association for the purpose of setting up destination management organizations, with the obligation to ensure a representativeness of at least 50%;
- to provide the financing sources necessary for the functioning of the destination management organization, from the special taxes (established under the provisions of art. 484 of Law no. 227/2015, as subsequently amended and supplemented), and/or from other amounts collected for the purpose of promoting and developing tourism.

In introducing this legislation, the intention is to establish new sub-national tourism organisational structures that will facilitate the public sector, private sector, and NGOs to co-operate in partnership to deliver better tourism outcomes for local communities and consumers than might otherwise arise if all three actors were to behave in a unilateral, and disconnected fashion.

Notwithstanding the intention behind the law, in the course of the consultative engagements with private sector tourism organisations (a workshop in Bucharest and two regional workshops in Constanta and Brasov), and including organisations acting as de facto DMO structures, a sense of anxiousness was expressed in relation to the potential introduction of new legislation. In summary, industry concerns arose from three anticipated effects of the implementation of the legislation, as follows:

1. The DMO provisions in the current legal framework or the implementation of the provisions from the draft of the new Tourism Law will remove or displace existing DMO-like structures in Romania, in favour of new structures to be established under the provisions of the new legislation.
2. The arrangements through which any tourist taxes or other revenue raising mechanisms would pass through to the DMO, and the degree of discretion the DMO might enjoy in relation to the disbursement of such revenues, is a source of concern.
3. A particular concern was expressed by private sector tourism operators in relation to a situation where a voting majority could be attributed to the “local public administration authority” which grants the public authority the determining vote, in relation to the allocation of public resources in the public interest. It is understood that this approach is intended to prevent public/tax-payer money being spent on projects that may not contribute to the wider public good.

Of these legislative provisions, particular concern has been expressed by private sector tourism operators in relation to the position of the voting majority attributed to the “local public administration authority” which grants the public authority the determining vote, in relation to the allocation of public resources in the public interest. It is understood that this approach is intended to prevent public/tax-payer money being spent on projects that may not contribute to the wider public good.

However, from a private sector point of view there is a concern that a mechanism providing such a casting vote to the public sector, could simply be used to frustrate innovative and entrepreneurial propositions brought forward by the business community. Furthermore, in the workshops and meetings conducted within this action, various private sector representatives have argued that local tourism-based revenues collected should not be considered “tax-payers money”, but rather levies paid by tourists visiting Romania, which are collected at source by a local tourism operator, then remitted to the local public authority, and ultimately redirected for use by a local DMO. Within this understanding of the monies concerned, no vulnerability to the improper use of public funds arises. This interpretation may not be shared by others, but it is an interpretation articulated in discussions with private sector stakeholders, and for that reason it is referenced in this diagnostic report.

Nevertheless, this is a challenge for the establishment and functioning of a sub-national network of DMOs in Romania. Much of the commentary on this matter to date appears to have been legalistic and regulatory in nature. While clarity and precision in organisational process is important, it will not serve as the binding agent that supports a high-performing DMO. A DMO structured within a public private partnership (PPP) will work best when it can establish operating procedures that are considered equitable to all parties concerned.

Supply side bias and consumer centricity

Supply side bias is an inherent challenge in tourism development, particularly where the tourism proposition being offered is structured along the boundaries of a local government territorial unit. The terminology in this case follows conventional economic usage. The supply side is occupied by the producer

of the good or service in question while the demand side is occupied by the consumer of the good or service in question. If product development is undertaken on the supply side with a limited or insufficient understanding of the requirements of the consumer (demand side), then the ultimate economic outcome will be sub-optimal.

For example, it is common for a small town/municipality to in effect say, “come and visit our town” and to produce a brochure or website providing an inventory of all the tourism assets in the town. This can seem reasonable to those familiar within the town and who are accustomed to looking inward at it. However, this behaviour opens the consumer engagement with a risk of supply-side bias. The implicit premise in the statement may not always be valid – (i.e.) the town in question may not be inherently attractive and compelling to potential visitors.

A better way to open the consumer engagement would be first to ask, “What does the consumer want”? And then as a second step in the process, consider whether the town/county/region in question has what the consumer is looking for - and if not, will it be able to develop it in the future. An additional step might be to consider whether the town could meet consumer demand by developing partnerships and/or working closely with nearby towns to develop a more attractive ‘destination’. In effect, these would represent steps to forming a DMO that could perform at a higher level than the town could on its own (Box 3.2).

Box 3.2. Local DMOs network in Trentino region, Italy

Trento, based in the Eastern Alps, has been transformed into a successful tourist destination (from 100 000 overnight stays in 1989 to 1 million in 2015) through public and private investment and policies, aimed primarily at making it a liveable, cultural and sustainable city. The success of Trento as a tourist destination is primarily the result of a mix of strategies and initiatives: focus on liveable and sustainable city, experiential tourism, networking strategies at international level, brand ‘Trentino’, product diversification and niche markets, events, festivals and itineraries.

Trento’s experience demonstrates the success of strengthening the relationships of a city with its surrounding region where the city is the core, the starting point for exploring a wider region. Trento achieved this through improved transport links and marketing of the city and the wider region together. Trento is the Heart of Trentino, and Trentino Marketing promotes Trento as an integral part of Trentino. APT Trento focuses on promoting its own territory; however, APT Trento provides also information for the whole of Trentino.

There is a high degree of co-operation and synergy among the various local DMOs in Trentino region with the intention of offering the tourist a complete experience package, optimise the use of resources for projects involving more than one destination and avoid duplications and overlapping of events.

Trentino Marketing is the DMO at Province level, financed and led by the Province, which leads the marketing strategies for Trentino through legislation, policies and strategic plans which set the guidelines for the city council own policies and plans, as well as the DMOs at Province and local levels. The 14 local DMOs including Trento DMOs are independent private companies with public and private partnerships, partially financed by the Province, and with City Council representatives on their boards of directors. The APTs engage in information, marketing, organisation and visitor assistance services at local level in strict coordination with Trentino Marketing and the other local DMOs.

The implication of this for DMO development can be summarised as follows:

- There is no reason why a DMO should not be developed on the basis of a local administrative area. However, the DMO may function more effectively if it is built, not on a geographic county unit but

on the basis of a strong consumer-centric tourism proposition (a mountain trail, a river delta, a heritage castle trail, a gastronomy trail etc.) which could span one or more county areas.

- Understanding what the consumer wants – being consumer centric – requires current market intelligence derived from good market research and consumer segmentation analysis. The avoidance of supply-side bias and the development of good consumer-centric market intelligence could serve as two guiding principles for DMO operations.
- The tourism marketing domain is a very cluttered and noisy space, at both the national and international level. It is exceptionally difficult for a small tourism entity – for example a small municipality - to cut through this noise and make itself heard. In tourism marketing terminology, failure to achieve "cut through" is a well-recognised challenge.
- One way to respond to this challenge is to build critical mass. This could be achieved if a municipality was able to build organisational scale by joining its tourism endeavours with those of other public and private sector organisations in the wider area (tourism or tourism-related). Developing critical mass in this way also generates economies of scale and associated cost reduction, as costs in areas such as marketing, research, skills development, and product and experience development are shared across a number of partner agencies. Building critical mass and achieving marketing "cut through" are two reasons within a wider array of compelling reasons to consider the establishment of a tourism DMO (Box 3.3).

Box 3.3. Strategic partner development by the Istria Tourist Board, Croatia

The Istria Tourist Board is a county-based DMO founded in December 1994 with its headquarters in Poreč. The rights and obligations of the tourist board are regulated by the Act on Tourist Boards and the Promotion of Croatian Tourism, and by the Board's statute.

Notable feature of tourism in Istria include its approach to marketing. The DMO has placed an emphasis on strategic marketing with good creative content. Recognising that Germany was Istria's biggest source market, the Istria Tourist Board in June 2018 signed an agreement with Bayern Munich Football Club whereby the club will serve as a tourism partner for Istria and promote the region among German tourists. This is a three-year co-operation contract signed by the Istria Tourist Board and Bayern Munich. Among the elements agreed in the contract Istria can present its tourism offer via FC Bayern club media channels which has over 70 million followers. The strategic partnership significantly supports the positioning and promotion of Istria as a destination in its most crucial broadcasting markets. The initiative leverages the reputation of the strategic partners, their recognition, and quality to strengthen the reputation and recognisability of the Istria brand.

The key point to be taken from the Istrian example is how a destination positions itself in the international consumer market space. Istria knows two things. It understands that its primary market is the Bavarian region in Germany. It also knows that it needs to fill its on-line presence with attractive, compelling, and creative content. The alliance with Bayern Munich allows it to (a) position itself in front of a Bavarian audience, and (b) use the established Bayern Munich communications channels as a vehicle in which it can place its creative "Visit Istria" message to an already receptive audience.

Engagement with industry

Private sector enterprises deliver the great majority of services and experiences consumed by tourists in any given destination. These services typically include areas such as accommodation, hospitality, food and beverage, transportation, tour guiding, equipment and bike hire, entertainment, and visitor attractions. It is the private sector that creates these services, invests in the capital assets required, and invests in

enabling structures such as sales and marketing systems. It is also the private sector that hires the staff who deliver these services, and these employees are at the front-line of interaction with visitors on a daily basis. For the most part, tourists do not tend to meet public officials. If they are managing their businesses properly, the managers in these private enterprises should understand what their customers want, they should be getting customer feedback, and they should be looking for changes and trends in consumer behaviour. In short, the private sector should know and understand their customers, and what it is that they want in a tourism destination.

However, the public sector and public sector managers have an equally important role in shaping the visitor experience. While the private sector creates and delivers services and experiences for visitors, many do so in spaces that they do not own. Visitors to Romania, who are attracted by its natural, built and cultural heritage will typically consume services delivered by the private sector in physical spaces that are either owned, operated, or regulated by the public sector.

This will be the case for example in spaces such as a visit to a town square, a municipal art gallery, a hiking trail in a national park, a guided tour of a heritage property, a river tour in a special area of conservation, bathing in clean water on a clean beach, skiing on well- maintained slopes and so on. The public sector also invests in core infrastructure, assets without which tourism activity would be greatly reduced, Examples include street lighting, street cleaning and cleaning of other urban spaces, public art, public safety and public order, public transport, tourist information centres, and the maintenance of natural resources such as national parks and waterways. Whether these things are done well or done badly will be a major determinant of tourism success.

It is clearly important that the public and private sectors should communicate and co-operate on a routine basis so as to ensure that service planning and delivery are aligned as fully as possible. The establishment of a DMO provides a structured basis for this type of Public Private Partnership (PPP) to take place.

The capacity of the public sector to engage meaningfully with private sector tourism operators could be considered to represent a defining attribute for a DMO. Unless this can be managed effectively, it is likely that the DMO could be considered by the private sector to be somewhat remote and irrelevant. Yet in many countries this can remain a challenge. Apart from the hotel sector (which is very often comprised of sizeable businesses co-located and clustered in major towns and cities), the structure of the tourism industry is mainly characterised by a large number of independent SMEs and micro-enterprises scattered widely across the country.

SMEs represent the backbone of the tourism sector, notably traditional small and micro-enterprises offering destination-based tourism services (e.g. hotels, restaurants, excursions, leisure activities), which co-exist with a small number of large companies. These small firms may operate on the basis of informal business processes and are often managed by busy people who are not interested or able to go to meetings, and who may benefit from participating in a larger organisational structure such as a DMO. It is important therefore that a DMO is both visible and relevant to its local stakeholder base. Most importantly, if a DMO is to secure in-kind support for specific events/initiatives/campaigns etc. or a revenue stream by way of membership fees from its local tourism stakeholder base, it must be seen to be making progress on the issues that matter most to those local tourism businesses.

In Romania, industry feedback suggests that there is an interest from businesses to have high-performing DMOs that respond to the following specific needs:

- Provide a trusted institution for advice. Provide knowledge and support for accessing/catalysing funds for tourism development on national and European level and in conducting feasibility analysis and solid business plans of projects.
- Establish common objectives, define a common mission, and design platforms for growing tourism in the destination. Develop closer alignment and integration between the regional efforts and the national tourism promotion strategies, to tap into the tourism potential of the country.
- Invest in key infrastructure for tourists, which can enhance residents' wellbeing as well.
- Go beyond promotion, and include activities for promoting sustainability, accessibility, and infrastructure.
- Develop market intelligence, research and analysis for tourism that can support a strategic market prioritisation
- Build storytelling behind destinations, to leverage the rich cultural and natural heritage.
- Organise training to strengthen tourism human resources.

In order to be both visible and relevant, a newly established DMO must operate from a very strong ICT platform, with a strong social and digital media competence, and with insightful and creative on-line content that can only be accessed by members. Destinations need to re-think how travel experiences are framed and marketed, as changing demographics are likely to dramatically shift the way in which people choose where and how to experience travel. Innovative digital campaigns, utilising social media platforms to promote the sharing of experiences will become increasingly important components of tourism marketing strategies.

4 Tourism destination management SWOT Analysis

Strengths, weaknesses, opportunities and threats in destination management in Romania

A SWOT analysis was conducted to assess the status of tourism in different Romanian regions and to identify the main developmental requirements in terms of destination management. Inputs were received from 132 organisations and the results were considered during two regional workshops (Constanta in May 2019, and Brasov in July 2019).

The number and nature of the organisations surveyed, and questionnaire returns received, is presented in Table 4.1 below. In order to identify any divergent views between stakeholder groups, results were initially grouped to provide an RDA/County Council perspective (Figure 4.1) as well as that of DMO-like organisations (Figure 4.2).

Table 4.1. Organisations Surveyed in the SWOT Exercise

	Existing DMOs	County Councils	Local Council	TICs	RDAs	Ministries	Other	Total
Invited	19	41	41	387	8	6	13	**515**
Respondents	11	13	34	65	2	3	4	**132**
Percentage of response	58%	32%	83%	17%	25%	50%	31%	**26%**

Figure 4.1. SWOT Analysis Results - RDA and County Council Perspective

STRENGTHS	WEAKNESSES
• Strong tourism asset base – Natural Heritage, Cultural • Heritage, and Patrimony • Gastronomy • Hospitality • Good Tourism Attractions • Cultural & Artistic Events	• Poor Internal Transport Infrastructure • Limited Access Infrastructure to certain tourism assets. • Poor Access to Mountain Areas • Unqualified Employees • Few International Tourists

OPPORTUNITIES	THREATS
• Public Funding/EU Grants • Increase International Visitors – Spa & Wellness • Improve Service Quality and Price Competitiveness • Product Differentiation/Diversification • Build on EDEN Network – Brand Identity	• Poor Skills – Poor Standards – Poor Consumer Value. • Increasing Competition • Depopulation and Migration • Political Instability – Unexpected Legislative Change • Loss of Authenticity in Rural Areas

Figure 4.2. SWOT Analysis Results DMO-like Organisation Perspective

STRENGTHS	WEAKNESSES
• Natural Heritage & Cultural Heritage. • Gastronomy • Hospitality Facilities • Good Resorts • Good Tourism Attractions	• Inadequate Transport Infrastructure • HR/Skills Gaps – Staff Shortages • Poor Destination Image • Poor Presentation of Public Spaces • Lack of Community engagement with Tourism.
OPPORTUNITIES	**THREATS**
• Focus on Product Extension and Product Development • Develop Niche Products • Access to EU Funds • European Capital of Culture 2021 • Restoration/Renovation of Patrimony	• Inadequate Workforce • Lack of Continuity in Public Policy • Brand Incoherence • Destruction of Local Architecture and Local Lifestyle. • Poor Value for Money & Competitiveness

The results to emerge from the SWOT exercise reveal a notable degree of alignment between the public sector and the private sector in how they understand the current situation in Romanian tourism. Key areas of alignment across the RDAs and County Councils, and the existing DMOs, are presented in Table 4.2 and include the following:

- Strong Tourism Asset Base – Natural Heritage and Cultural Heritage
- Internal Transport Infrastructure Deficits
- Poor Training, Poor Skills, Poor Standards, Poor Consumer Value
- Product Differentiation/Diversification

Another area to emerge, although with somewhat less alignment between public and private sector organisations, was the extent to which public policy making in tourism was disjointed and lacking in coherence and continuity. This view was more frequently associated with the private sector.

These areas of alignment are significant in that they effectively represent an initial work agenda for new sub-national DMO structures. Given the anticipated PPP alliance that will characterise these new DMO structures, it is clearly important that areas which have been identified by both the public and private sector as being matters of strategic importance should be prioritised for action. Whilst not a statistically representative sample, it is important to note that these results have been produced by an independent group of individual respondents who had no opportunity or reason to wish to reinforce each other's views. They therefore provide a clear indication of matters that require further attention within the context of the further development of tourism in Romania.

Table 4.2. Areas of Alignment across the Public and Private Sectors

Factor	RDAs and County Councils	DMO-like organisations
Strengths	• Natural Heritage, Cultural Heritage, Patrimony • Hospitality	• Natural Heritage, Cultural Heritage • Hospitality Facilities
Weaknesses	• Unqualified Employees • Poor Internal Transport Infrastructure	• HR/Skills Gaps – Staff Shortages • Inadequate Transport Infrastructure
Opportunities	• Public Funding/EU Grants • Product Differentiation & Diversification	• Access to EU Funds • Develop Niche Products
Threats	• Political Instability - Unexpected Legislative Change • Poor Skills, Poor Standards, Poor Consumer Value	• Lack of Continuity in Public Policy • Inadequate Workforce

The above results were tested with participants at both regional workshops who indicated that they recognised these factors as being realistic and prevailing characteristics of Romanian tourism. On that basis, it is therefore expected that the issues presented represent a significant strand within the diagnostic assessment of the tourism sector in Romania.

Policy implications for destination management in Romania

Six issues of immediate and strategic importance emerge from the SWOT analysis. These are outlined in Figure 4.3:

Figure 4.3. Strategic issues for destination management in Romania

The tourism asset base

The SWOT outcome suggests that the tourism asset base in Romania is strong. This asset base is comprised of the **natural heritage** – Black Sea coast, Danube Delta, mountain ranges, balneary waters, lakes, ski slopes, and outdoor activity and adventure, **built heritage** – urban centres, museums and galleries, cathedrals, castles and gardens, forts and military structures, historic buildings, and religious heritage sites, and **cultural heritage** – patrimony, literature and music, contemporary festivals, folklore

and legends, gastronomy, rural lifestyles and traditions in small villages, architecture and the arts. Whilst these strong assets were recognised there was also a fear that they needed to be protected and conserved as fully as possible. For example, concern was expressed that in parts of the country depopulation and migration was thinning out small settlements and so erasing the lifestyles, traditions, and culture associated with those locations.

In terms of developing and maintaining a strong competitive advantage in tourism, Romania's strong asset base offers a platform on which to build. As in most countries the challenge is how to use and present these assets to tourists, without doing so to an extreme extent where damage may be done to the core asset itself. These are issues which are best managed by tourism people working together in partnership within a DMO structure (Box 4.1).

Box 4.1. Sustainable tourism management in Göteborg & Co, Sweden

Göteborg & Co is the DMO for the city of Gothenburg, Sweden, notable for its governance and for its focus on sustainable tourism as a source of international competitive advantage and as a mechanism to achieve recognition and standout in international tourism markets.

Göteborg & Co is owned by the City of Gothenburg through Göteborg Stadshus AB. It has a board of seven members, and a staff of nine. The mission of the DMO's operations is to improve the quality of life of the people who live and work in the destination. It is noteworthy that the DMO supporting Gothenburg as a destination, is not only active in developing and maintaining a very high standard in sustainable tourism, but it then uses this achievement as a source of economic competitive advantage and places this message at the centre of its promotion and marketing programmes so as to achieve standout in international markets.

The organisation promotes advancements in the following sustainability objectives:

- Almost all hotels have environmental diplomas.
- Around 65 per cent of public transport in Gothenburg runs on renewable energy.
- There are 1000 "Styr & Ställ" city bikes to rent at 60 different locations in the city.
- All restaurants that are part of the Taste of Gothenburg association have environmental diplomas or are in the process of certification.

The key point is that the DMO supporting Gothenburg as a destination, is not only active in developing and maintaining a very high standard in sustainable tourism, but that it then uses this achievement (a high-performing sustainable destination) as a source of economic competitive advantage and places this message at the centre of its promotion and marketing programmes so as to stand out in international markets. So "sustainability" performs not only as an end in itself, but also as a tool to provide the destination with an enhanced level of competitive advantage.

Tourism employment and skills deficits

Respondents to the SWOT exercise – almost without exception – report skills gaps and deficits across the tourism workforce and increasing levels of difficulty in finding and hiring staff in the first instance, and then retaining them. This is a particularly critical issue in the tourism industry where the visitor experience is directly mediated through tourism staff and through the professionalism and enthusiasm that they bring to their work.

Box 4.2. Addressing tourism skills deficit, the case of Gozo Tourism Association, Malta

The Gozo Tourism Association (GTA) was established in 1999, with the main objectives to unite tourism stakeholders, and to promote Gozo as an all year-round distinct tourist destination. The GTA is a legal entity established under statute and is governed by a Board of 14 members. The association is undertaking a number of initiatives to create more employment opportunities for the younger generation, which is currently opting to settle and work in mainland Malta.

- The Human Capital initiative was launched to promote the benefits of investing in tourism education and training, and the importance of developing skills through the VET sector. The programme includes the development of a holistic strategy towards the implementation of a long-term action plan aimed at mitigating and addressing the brain drain that tourism establishments within the sector are experiencing.
- Another initiative taken on board by the Association is the participation in TOUROPE project. The TOUROPE European alliance (26 partners in 13 countries) is an online platform that will allow stakeholders to discuss trends and new tourism skills, professional profiles and skills shortages, VET courses and competences required, move towards the green economy and circular economy, disseminate the benefits of human capital investment, and develop a framework for associated deliverables.
- GTA also organises a number of annual events to highlight the importance of skills in the tourism industry. These include the Gozo Young Tourism Worker of the Year Award, the Gozo Tourism Worker of the Year Award, the Gozo Entrepreneurship Award of the Year, and the Careers Week in Tourism.

The example of Gozo illustrates how an activist DMO, working with public and private sector partners, can develop very practical training support programmes including curriculum development, programme design, alignment with industry needs, and support programmes such as annual events and awards, to highlight how skills development can support the tourism experience in a busy tourism destination.

A particular concern reported in this respect is the number of Romanians leaving the country to work in tourism or other sectors in neighbouring countries. The high number of tourism workers in the informal economy in Romania was also noted. It is clear that there is an urgent education and skills issue to be addressed in the Romanian tourism industry. Continuing poor skills levels will undermine the visitor experience and ultimately undermine the value for money associated with the Romanian tourism offering. The promotion of existing training programmes, combined with the development of new training programmes, is required. These programmes should be weighted towards Vocational Education Training (VET), rather than managerial or academic programmes. Aside from education and training, the working environment and working arrangements within the tourism sector need to be reviewed so as to understand why recruiting staff is such a challenge, and to begin developing solutions to these challenges. These are matters that should be addressed within a new sub-national network of DMOs (Box 4.2).

Product differentiation and diversification

Whilst acknowledging the strong tourism asset base in Romania, the SWOT also reported a need for the tourism industry to consider how the tourism product could be differentiated, diversified, and further developed. This again reflected an understanding of the importance of creating a clear “competitive advantage” for Romanian tourism within the context of neighbouring competitor destinations. This did not imply any abrupt shift from existing tourism products and experiences and existing tourism markets, but rather a consideration of how the existing tourism asset base could be further developed so as to expand

Romania's position in existing markets, and in the longer term further diversified so as to enable Romanian tourism to gain traction in new markets.

This is not about inventing new product. It is rather a product development strategy that will require further investment. A structured and funded programme of capital investment in tourism product will need to be considered. DMOs play a key role in facilitating and directing investment and funds to the development of tourism products.

Transport and access infrastructure

Infrastructure deficits are related primarily to transport infrastructure (including regional and international airports) and to the national road and rail network. In most countries, it is generally an aim of public policy and tourism planning to promote the spatial and temporal distribution of tourism benefits as widely as possible. This reflects a concern that tourism should not be overly concentrated in a limited area, and that economic gain should be distributed to communities across the country. This spatial dimension of tourism planning can only be delivered if tourists can easily access a variety of international transport nodes including air, rail, and sea-ports, which are then supported by a convenient and efficient internal transport system. Related to this is the matter of local access infrastructure off the national road and rail system. This would include local transport access to sites of particular tourism interest – a village, castle, or garden with particular stories to tell. It would also include easy access to tourism beauty spots such as a lakeshore, riverside or mountain location, with facilities such as viewing bays, parking for cars and coaches, catering services, and toilets.

While the Ministry of Economy, Energy and Business Environment might be in a position to lead on some of the latter issues, the Ministry of Transport will be the principal agency leading policy on transport infrastructure development. While transport infrastructure policy will not be developed with an exclusive focus on the tourism industry, as a cross-cutting policy area with many obvious synergies with tourism, it is clear that both ministries would benefit from close and regular communication and coordination to ensure that key issues are considered in respective long-term planning and strategies. A properly functioning network of sub-national DMOs should be well positioned to advise the Ministry of Economy, Energy and Business Environment on priority areas for transport infrastructure development within and between destinations.

Tourism and the public policy environment

Among the questions asked in the survey of DMOs, respondents were requested to rate the performance of government in terms of its role in supporting tourism development at the national level, regional level, and local level.

The responses highlighted the fact that private sector operators feel somewhat excluded from tourism planning and strategy development, and that they would like to have an opportunity to contribute to that process. A strengthened and well-resourced DMO network, involving public sector and private sector partners, could contribute to alleviating some of these concerns Box 4.3).

Box 4.3. Tourism promotion by the North East Regional Development Agency, Romania

Within Romania, opportunities exist to access good practice and innovation in international tourism, and to explore potential sources of tourism development funding. The eight Regional Development Agencies established in Romania administer projects and programmes supported by the European Regional Development Fund (ERDF). One of the priority areas within the ERDF is support for SMEs and Microenterprises which are the type of businesses most commonly found in the tourism industry. As an example, the tourism activity supported by the North-East Regional Development Agency (NERDA) which is based in Piatra-Neamt supports tourism development.

NERDA is a non-profit, non-governmental, public utility organization, established in 1999 and has experience in developing and promoting strategies, attracting resources, and implementing EU funded programmes. Since its inception, NERDA has been active in the tourism sector, and has carried out the following activity:

- Development of Regional Tourism Action Plan, and Regional Action Plan for Protection, Conservation and Promotion of Cultural Heritage 2018-2023. The objective of these strategies in the tourism sector is sustainable tourism development, increasing competitiveness and the tourism attractiveness of the region. NERDA is currently developing a regional "umbrella" brand that can be used in the field of investment (investment brand), tourism (destination brand), local and traditional products (brand of origin), and quality and style life in the region.
- Tourism promotion campaign Discover the North-East that includes: big tourism promotion annual events, videos, articles and printed brochures of the tourism offer, and a portal and a Facebook page for the promotion and marketing of events and tourism in the region.
- Education and training of human resources in the tourism sector has been one of the main pillars NERDA's work programmes. It has developed various projects and proposals for occupational standards, curricula and course support, e-learning learning platforms, and training for trainers in the field of energy efficiency, senior tourism, executive coaching, strategic management, leadership, public procurement, project management, human resource management, access to European funds, and marketing and promotion.

Access to diversified funding sources

Tourism development in Romania will require investment in the core tourism product itself, as well as investment in tourism-enabling transport and access infrastructure. Throughout the consultation process, operators expressed the view that the tourism sector should consider how it might access EU funding to support such investment. Case-making of this sort is likely to be more effective when it is developed at DMO level in consultation with local and regional government partners. The DMO could further support these endeavours by identifying diversified sources of available funding. The relevant RDA could play a role in supporting the development and articulation of such case-making/grant applications.

5 Addressing the challenges – Developing a plan

Building on existing structures – working with existing DMOs

As noted previously, concern was expressed during the OECD mission in Romania in 2019 that existing DMO-like structures in the country could be vulnerable to displacement following any change in the legislative framework. There is a strong argument to be made, however, that where existing DMO-like structures exist and are working to a good and effective standard, that the initial steps in the establishment of a sub-national DMO network should have regard to those DMO structures that currently exist, and to bring those existing structures forward as a basis for further organisational and tourism development. However, if there is insufficient critical mass, existing DMO-like structures should be encouraged to work closely with other DMOs or counties in order to build a level of organisational scale that would prove more effective in domestic, and more importantly, in international markets.

It is noted that "local tourism associations at a regional, county or municipal level bring together the public and private sectors, and NGOs".[5] Some of these Tourism Associations serve as "de facto" Destination Management Organisations in their respective territories. It is expected however that there may exist a wide divergence across the country in respect of matters such as:

- Whether there is a Tourism Association in all of the 41 counties in Romania?
- Where Tourism Associations do exist, how many of them are active and how many are dormant?
- What resources can they access – budget and staff?
- What capabilities do they possess?
- How are they governed, and what is their legal status?
- What business models have they implemented?
- What annual work programmes do they implement?
- What is their focus – territorial or tourism proposition?
- Do they engage in a full range of DMO activities or are they primarily concerned with promotion and marketing?

Existing DMO-like organisations in Romania tend to have limited funding sources, budgets and capability to deliver a full range of DMO tourism support services. Board structures are not clearly defined in many cases.

In terms of "building on existing structures", it is clear that some Tourism Associations are well resourced and experienced. Others could become more effective with appropriate capacity building – in addition to budget support. At present some of these organisations are relying on volunteers and part-time contributions from locals as required. In many cases, these local Tourism Associations are led by individuals with a strong knowledge of tourism (in most cases having worked, or currently working, in the industry), and a great energy and commitment to develop tourism further in their area. These people, and

the Tourism Associations/DMOs they lead, could represent a strong platform on which to build a future network of DMOs, even if the resource base in some other respects remains limited.

At present, most of these organisations appear focused on promotion and marketing activities, with limited capacity or focus on organisation development, product development, or business development.

A list of the Tourism Associations/DMO-like organisations that engaged with this project (either at the project kick-off meeting, the workshops at Constanta and Brasov, or by returning survey questionnaires) is presented in Table 5.1 below.

Table 5.1. Associations in Romania that currently work as a DMO

No.	Association	County
1	The Association for Tourist Promotion and Development Brasov	Brasov
2	Poiana Brasov Association	Brasov
3.	Protourism Association Fagarasi Country, Sibiu	Sibiu
4.	The County Association for Tourism Sibiu	Sibiu
5.	The Intercommunity Development Association Bistrita Nasaud	Bistrita Nasaud
6.	The Intercommunity Development Association Harghita	Harghita
7.	The Intercommunity Development Association Sarata Monteoru	Buzau
8.	The Intercommunity Development Association Buzau Landing	Buzau
9.	The Association for Tourist Promotion and Development	Prahova
10.	The Ozane Valley Association for Tourism Promotion and Development	Neamt
11.	The Association for Tourism Promotion and Development	Neamt
12.	The Association Microregion Hateg Country – Land of the Forest People	Hunedoara
13.	The Association for Tourism Promotion Oradea and Region	Oradea
14.	The Association Management Agency of Bihor Destination	Bihor
15.	The Association for Tourist Promotion and Development in Timis County	Timis
16.	The Association Visit Mures	Mures
17.	The Tourism Association Covasna	Covasna
18.	The Association for Tourist Destination Management – Danube Delta	Tulcea
19	The Association Danube Moldova Noua	Caras Severin
20	Mamaia Constanta Private Organisation (OPMCTA)	Constanta
21	The Association for promotion and development of tourism “Acasa la Brancusi”(home of Brancusi)	Gorj

Source: OECD

Building new structures

In terms of creating new DMO structures, there are six key factors that should be considered, and these are set out below. These are essentially operational considerations and they are presented here at a relatively high level as functional issues requiring attention. They are elaborated in greater detail in the Operating Manual.

Creating new DMOs

It is considered that there are two circumstances that could prompt a decision to create a new DMO in Romania. These are:

- where there is currently no properly functioning DMO in an area.
- where the area in question possesses a strong existing tourism asset base which has not been utilised to the full, or where it has the potential to develop such an asset base (Box 5.1).

Box 5.1. Establishing a DMOs in the Slovak Republic

Thresholds for establishing a Local DMO

In the Slovak Republic local and regional tourism organisations (DMOs) are regulated by the Tourism Support Act, and are responsible for the development of tourism and the creation and promotion of competitive tourist products within their defined territories. Currently there are 37 local and 7 regional tourism organisations operating in Slovakia and co-funded from the state budget.

The act sets clear thresholds of "critical tourism mass" for the establishment of a local tourism organisation. This may be established by business entities and at least five municipalities, while the total sum of overnights in accommodation establishments on the territory of the founding municipalities in the previous year must be at least 100 000. The local tourism organisation may be established by less than five municipalities if the total sum of overnights in accommodation establishments on the territory of the founding municipalities in the previous year must be at least 250 000.

Funding of regional and local DMOs networks

Local and regional tourism organisations in Slovakia (DMOs) created under the Tourism Support Act may be co-funded from the state budget. Subsidies are only given to tourism organisations registered by the Ministry of Transport and Construction of the Slovak Republic (in charge of tourism), for activities linked to their main scope of business. The subsidy is paid for particular budgetary year and is equal to the sum of money acquired by the local tourism organisation from membership contributions or by the regional tourism organisation from the contribution of regional self-governing authority in the preceding budgetary year.

The subsidy can be granted to marketing and promotional activities, creation and development of sustainable tourism products, activities of tourist information centres, educational activities, operation of reservation systems, support of the potential of the given locality to become part of tourism offer, strategic tourism documents, statistics, research, establishment of tourism service quality systems.

Source: Ministry of Transport and Construction of the Slovak Republic

As discussed previously, it is not necessarily the case that every county in Romania must be considered to be tourism centric. It is in fact much more likely that those parts of Romania that are of interest to visitors (and particularly international visitors) have already found their market. Those that have not may have relatively little to offer visitors, at least in the short term.

Operations – functions and focus

The key point in relation to a DMO's functioning and focus is that in recent years it has moved past the idea of a DMO representing a solely marketing and promotional vehicle for the area in question. In addition to marketing and promotion, a destination management organisation will be concerned with functions on the supply-side such as product innovation, product development, product investment, product presentation, experience development, animation, communications technology, storytelling, training and education, skills development, and human resource management.

However the key role of a DMO is to develop the capacity to support tourism development by mobilising local stakeholders. Whilst in some respects a DMO will be an organisation implementing projects, it is also very importantly a coordinating organisation. This is at the core of the Public Private Partnership (PPP) principle where the intent is to mobilise the joint capabilities of the public sector, private sector, and local NGOs active in tourism.

Within a destination, DMOs are positioned at the centre of a range of functions all of which will influence the visitor experience at the destination in question. Some of these functions are conventional business activities such as marketing, business advice, and product quality and standards. Others, however, can be less immediately obvious and yet can have an even greater impact on the visitor experience. Functions such as public order and public realm (the manner in which public spaces are managed and presented to both residents and visitors) will have an impact on tourists. Other aspects such as the extent to which civil society is mobilised to contribute to the visitor experience (for example in relation to heritage tourism), will also be an important determinant of a positive visitor outcome. In most cases, these elements do not simply come together in one unsupported and spontaneous action. They need to be managed into joint action, and this should be a key function and focus area for a DMO.

Work programming and planning

A newly established DMO must be able to convert strategic direction and planning into practical work programmes and planned activities. These should be prepared as an annual work plan and should set out the actions that will be taken by DMO staff to implement and deliver the tourism development strategy approved by the DMO Board. This annual work plan should contain a clear statement of deliverables (what will be achieved and at what point in the year), a clear statement of responsibilities (who is responsible for achieving what), and a clear set of smart key performance indicators (KPIs) –that are specific, measurable, attainable, relevant, and time-bound.

It is worth reiterating once again that the actions taken by a DMO will have both direct and indirect impacts. The direct impacts will arise from the actions taken and the services delivered by the DMO itself. More important however will be the indirect impacts created by the DMO when it operates as a destination broker – pulling together public sector, private sector, and NGO partners into a joint and concerted plan of action to deliver a positive outcome that increases tourism and economic activity in the destination. This is important for the Romanian context, where there are many fragmented associations and businesses working in tourism.

Market review

As noted previously there exists an immediate necessity to commission some market analysis and research in key Romanian tourism source markets. In terms of international tourism, it is unlikely that much will be achieved by a single county based DMO undertaking such research. This will be best done at regional level or at national level through the Ministry of Economy, Energy and Business Environment. Given the significant development of experience tourism in recent years, psychographic consumer research has largely replaced demographic models, and much consumer insight is now derived from consumer value systems, ethical beliefs, leisure interests, and lifestyles, consumer trends, and data analytics.

Budget structure

There is a need to identify a budget structure that will allow a sub-national DMO to operate effectively. It can be the case that an organisation may decide to wait until it receives its annual budget “allocation” before deciding on its own internal business plan for how that allocation will be spent. This however is always an unsatisfactory basis for business operations. It is preferable for a DMO to build its business case and its annual action plan, and to then present those to a funding authority seeking a level of budget support that is commensurate with the achievement of the plan presented.

However, in terms of funding it is evident that a clear and stable financial platform will be essential to establish and operate a high-performing network of DMOs. Given recent uncertainty concerning the evolution of the legislative framework to support the development and operation of DMOs, consideration may be given to making available supplementary funding from central government funds for selected DMOs during an initial pilot phase. Such an initiative would demonstrate both a strong commitment to the

establishment of a sub-national DMO network and a strong signal of support to the industry. It is envisaged that this facility would only be extended to the highest-performing counties (presented in Figure 7.1). As noted in the Operating Manual it is expected that an annual operating budget from public funds of approx. RON 1.2 million (approximately EUR 250 000) will be required for a regional (multi-county) DMO[4].

Shared resources

In developing a network of sub-national DMOs it will be important to understand the extent to which it may be possible to secure operational synergies across the network by establishing shared tools and resources. This could for example include a shared ICT platform, a common financial reporting structure (both for financial accounting and management accounting), integrated performance measurement tools, and a joined-up approach to consumer research (Box 5.2).

Box 5.2. Knowledge sharing networks for DMOs in Sweden

In Sweden some networks were created by existing DMOs for knowledge sharing, strategy discussions and possible common initiatives:

- The Regional Network on Tourism: Gathers the 20 regional destination organisations/functions in Sweden. (Sweden has 21 regions. Some are lacking a DMO but all at least have a smaller regional tourism function. Stockholm has no regional DMO, only municipal or sub-regional DMOs). The network meets twice a year and also invite national stakeholders, such as industry organisations, Visit Sweden and The Swedish Agency for Economic and Regional Growth. The event has developed into a high-profile meeting and was attended by the Minister of Enterprise and Innovation in 2019.
- SNDMO – The Swedish Network of DMOs: A recently initiated network, which gathers larger destinations (cities with more than 50 000 inhabitants). The network is mainly participants on a municipal or local level. The networks will meet twice a year and also invites national stakeholders such as Visit Sweden and The Swedish Agency for Economic and Regional Growth.
- “The Big City Network”: An informal network for the three largest cities Stockholm, Gothenburg and Malmo. They have much in common and meet regularly for knowledge sharing etc. This network does not include other external stakeholders in a regular or organised way.

Source: The Swedish Agency for Economic and Regional Growth

[4] The Operating Manual also notes that a further RON 1.2 million should be raised by a regional DMO from non-public funding sources, such as membership fees, sponsorships, and other commercial arrangements.

6 DMO development – key issues and principles

Why a DMO Structure

Romanian legislation defines a DMO as a legal entity which carries out the tourism development policy, including the policy of the marketing of the tourist destination.

In Romania there is a strong argument to support the view that, in and of itself, a network of high-performing DMOs at sub-national level should serve as an engine for future tourism growth and development beyond the counties and regions within which they are based. As noted previously, tourism is a disaggregated industry of many SMEs and microenterprises. Tourism services are frequently delivered in a space that tourism operators do not own, and very often with resources they do not own (and which may be in public ownership), and across administrative boundaries. Tourism delivery works best when there is an effective agent in the middle pulling all these strands together. This the key role that a DMO can perform.

Partnerships, networks, and virtual networks

DMOs are essentially about "partnership**".** The terminology of Public Private Partnerships (PPPs) is frequently used in the context of DMO development although there can be silence around the important principles implicit in the concept of partnership. Any business partnership works best when it is mutually beneficial to all parties involved. Partnership is therefore a subtle blend of self-interest and a preparedness to work with others to secure a greater economic good for the community in the destination itself. Partnership arrangements and structures should therefore be considered to be equitable by all partners. If a tourism DMO is performing effectively, small tourism businesses should be performing better and delivering a better service to their customers. This in turn should attract more visitors to the destination thereby generating more revenues for business and an increased local tax yield for the public sector which can then be reinvested in services and facilities for the local community. Local NGOs – particularly those in the heritage, culture, and activities sectors – should also benefit through participation in the DMO. While the DMO will be a physical organisation and a legal entity (typically a not-for-profit entity), it may also decide to engage with some partners in a nimble and time-efficient manner through the creation and use of virtual networks as projects and circumstances require.

Roles and responsibilities

Reference is made above to a "high-performing DMO". In order to succeed, most organisations require clarity - that is i) clear objectives; ii) clear business processes to achieve those objectives, and; iii) clear roles and responsibilities for those people working in the organisation. The latter is particularly important in the context of the establishment of a new set of DMOs. Every role in the DMO should have a written Role Profile and Job Description. The role profile should clearly set out the nature and purpose of the role

concerned, and the job description should set out the role and responsibilities of the of the job holder. The job holder should be provided with both these documents.

The conventional distinctions between management and board are important and must be observed:

- **Management** are responsible for the management of the DMO's business and the implementation of strategy as approved by the Board.
- **The Board** sets strategy and oversees its proper implementation by management. The Board must also remain mindful of the accountability of the DMO to the local public administration and to other public authorities as appropriate.

Performance review and accountability

The new DMO organisations will have a primary responsibility and accountability to the stakeholders that provide their funding – whether that is through the local public administration (Council), members fees, sponsorship or other channels. This will require the DMO to possess a competence in business planning and budget setting. It will also need a management control system to report on budgeted and actual expenditures and to provide information on actions taken, results achieved, and objectives secured.

This work could be undertaken by an in-house resource or perhaps more appropriately by an external resource contracted to design and support a planning and control system appropriate to the nature and scale of the DMO. Irrespective of how it is done, the principle of transparency and accountability will require the establishment of a set of Key Results Areas - KRAs (key activities and the results achieved which are core to the mission and purpose of the DMO. For example, these might include market growth, new product development, new skills training programmes) and a set of Key Performance Indicators - KPIs (measures and metrics that report in numerical terms on business performance – for example visitor numbers, daily spend in the destination, new tourism jobs created). This will require investment in an appropriately designed Management Information System (MIS).

Thematic networks

Reference has been made previously to the basis upon which DMOs might be established, and while it was recognised that geographic units (the county) can represent a convenient structure on which to establish and operate, it was noted also that other structures may also serve purpose. One such approach could be to establish a DMO based on a thematic structure rather a physical geography. Common examples of this can be seen in themes such as eco-tourism, rural-tourism, architecture, archaeology, castles and gardens. Other common examples are food (Gastronomy) trails, literary trails, and heritage trails. In these latter cases the "trails" could be reimagined as the destination, where in this case the destination boundaries are defined by a cluster of locations significant for food/literary/heritage reasons, rather than an administrative boundary. Destinations shaped in this manner might also cross county boundaries where there are further places of interest that are associated with the theme adopted. At a political level there is often an interest in "spreading the benefits of tourism to as many places as possible" – this issue is now most usually raised under a "regional development" agenda. Whatever the motivation, the point made here is that the "governing thought" behind destination establishment can be thematic as well as territorial (Box 6.1).

Box 6.1. Development of a Fairy Tale Route in Germany

The German Fairy Tale Route is a thematic based tourist destination which follows a linear route of 600 kilometres from Hanau in central Germany to Bremen in the north. The DMO that manages the route is Deutsche Maerchenstrasse E.V. based in Kassel. It is marketed as a driving route for a five to six day stay in Germany

The feature that gives the route its distinct meaning is the set of fairy-tales written in the late 1800s by the German Grimm brothers. All these stories were set in locations along this route. This is a good example of bringing cultural heritage to life through animation at key locations provided by costumed actors and storytellers. It is also a good example of a destination built around one unifying thematic idea. Consequently, the destination can be marketed as an integrated set of visitor experiences with an inherent capacity to lengthen the stay of visitors to the destination.

In this case the organising idea behind the development of the destination was a thematic and cultural one built around literature and folklore. The second step was to map the locations in which these stories were set and to join those locations up as a physical and spatial entity. This in turn facilitated the subsequent development and marketing of the route as a tourism asset.

The German Fairy Tale Route illustrates how destination development need not always start with a physical geography or county. It can start with an idea or theme, which then evolves into a visitor experience, which then must be delivered to visitors at some physical location.

Source: https://www.deutsche-maerchenstrasse.com

The destination as a stage

A notable feature of tourism evolution in many countries over the past decade or more has been an increased interest in “experience tourism”. As an industry, tourism has been recognised as being a significant player in the experience economy. The early proponents of the experience economy[6] were particular in the language used to describe consumer experiences. They suggested that a product was a something to be bought and consumed, whereas an experience was considered to remain with the consumer forever. A product was therefore considered to be an undifferentiated and homogenous entity (for example a hotel room) but an experience was something unique and memorable (for example, a guided hike through Carpathian trails). It was also considered that a product was manufactured but that an experience was “staged”. In Germany, for example, the Federal Ministry commissioned a new project in August 2015 entitled “The destination as a stage: How does cultural tourism make rural regions successful?” The project explored the potential to use culture to generate tourism in rural areas, how the various actors can be better networked, and what impact the marketing of natural landscapes and regional cultural assets – including cuisine and crafts – can have.

In practical terms, envisaging the destination as a “stage” could mean animating a town square with a re-enactment of local historic events or stories, festivals celebrating local music and dance, storytelling and guided tours of the destination, festivals of local gastronomy and crafts, and entertainment events attracting both residents of the town as well as those visiting it. One of the enduring difficulties with delivering memorable tourism experiences – particularly in the areas of cultural and heritage tourism – is that it can be difficult and expensive to animate public spaces and turn them into stages where visitors can hear the stories and history of the location. Doing this well also requires a considerable level of coordination. DMOs are essentially all about coordination, and the establishment of a new DMO network could represent an opportunity to expand even further Romania’s existing cultural and heritage tourism experiences.

7 Recommendations for the operationalisation of DMOs in Romania

Recommendation 1: Establish DMO network on a phased basis

It is recommended that between 6-8 county/regional[5] DMOs should be established over a phased four-year period, with an initial pilot phase in Year 1, during which two regional DMOs and four local DMOs might be established. This is essentially an argument for an incremental approach to DMO establishment on a year-to-year basis in the short to medium term, rather than a more risky strategy of the early delivery of multiple untested DMOs across the country. Further DMOs should be added over years 2 – 4, building on the insights and experience gained in Year 1. It is also recommended that the Regional Development Agencies (RDAs) should be invited to play a role in supporting the establishment of DMOs. In terms of its thematic concentration on four priority areas, and the ERDF's particular focus on "support for small and medium-sized enterprises (SMEs)", it would appear that the RDA structure represents a good fit with an initiative seeking to establish DMOs in the tourism sector. The RDAs could also facilitate newly established DMOs in accessing business insight and possible business development funding opportunities at EU level. However, under the current legal framework in Romania, it is not possible to establish a DMO network with a specified number of structures implemented on a phased basis. As such, the current legal framework would need to be amended to enable this recommendation to be implemented.

Recommendation 2: Focus on existing high-performance areas

This is a recommendation about supporting the most mature counties from a destination development perspective. These are the counties that appear in the top-ten list of both domestic and international visitors and which are clearly tourism rich and tourism centric (Figure 7.1). While it might appear to make sense in terms of tourism development, to look past these twelve counties and seek to intervene with currently tourism poor counties in order to bring them up to the standard of the top-twelve, apart from some exceptional circumstances such a policy would be misguided. In the absence of any compelling evidence to suggest that weaker counties possess previously untapped potential, tourism development policy should focus on those areas in Romania that the sovereign consumer has, over the years, chosen to visit. This is not an insignificant observation. Consumers travel to locations where they believe there are interesting things to see and do. The clear policy implication of this is to bring these locations to the attention of a

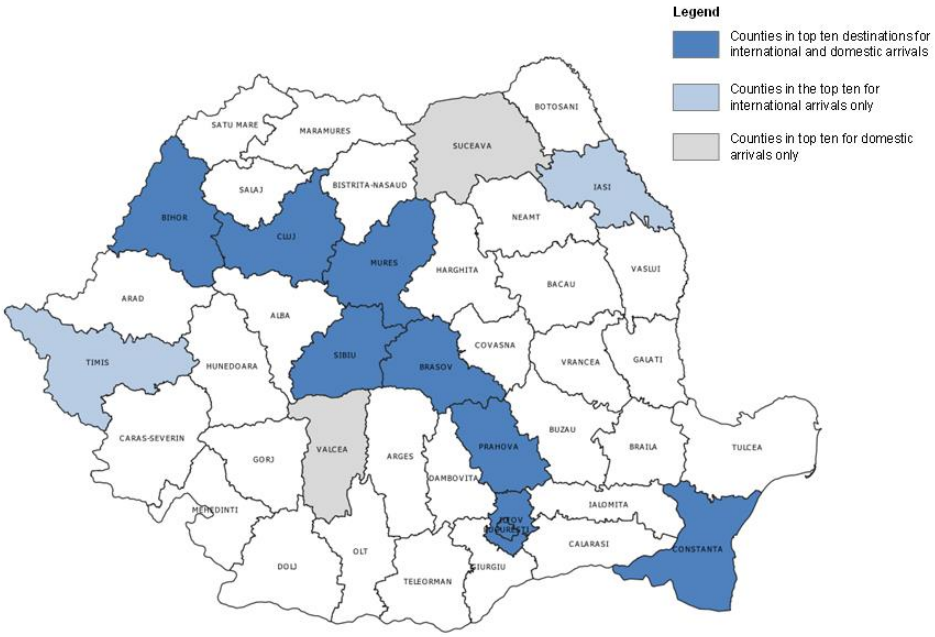
[5] The term "regional" has a functional meaning in this context and is used exclusively to convey the practicalities of tourism destination management and development – i.e. a multi-county DMO structure that should be better resourced to operate as a high-performing tourism destination (as opposed to a single county structure). In this usage, the term "regional" has no administrative, political, or legal meaning.

wider audience of consumers. Having secured this position, development attention can then at a later date turn to the tourism potential of the currently under-performing counties, which would benefit from the lessons learned in establishing the initial DMO network.

Recommendation 3: Establish DMOs based on tourism propositions

It is recommended that future DMO structures should - as far as possible – be built on strong and compelling consumer-facing tourism propositions. County boundaries and other local administrative boundaries are not readily understood by international consumers and so do not represent an intuitive basis for regional tourism development. In terms of tourism development, potential visitors researching a holiday in Romania should be presented with engaging and attractive tourism propositions (hill-walking, gastronomy, heritage castles and gardens, etc), rather than local government administrative frontiers which will mean very little to them. Local public administration authorities (e.g. individual counties) can serve as the basis for the establishment of a DMO, and it is clear why such a local authority makes sense and is familiar to those living in Romania. However, it makes little sense to those living outside the country. The resolution of this matter may be to ensure that where a local administrative boundary is chosen as the most convenient basis for the establishment of a DMO, that in that case very particular care is taken to identify and communicate the particular tourism advantages of that area.

Figure 7.1. Geographical distribution of high performing tourism counties in Romania



Recommendation 4: Take steps to build DMO scale

As noted previously within this report, building size and scale for a newly established DMO is important. A regional DMO operating within a network of sub-national DMOs needs to possess the critical mass – in terms of budget, capability, and competence – to ensure that as a destination it will stand out and is readily visible to both domestic and international tourism consumers. Scale is important if the DMO is to successfully address two of the major tourism challenges noted above – how to develop a unique selling

proposition (USP) or more generally how to develop a source of competitive advantage that makes it more attractive than competing destinations, and how to position itself so that it achieves “stand-out” in international markets. It is recommended therefore that in considering the establishment of a DMO, these two tests of “competitive advantage” and “stand-out” should be applied as a basis for decision-making. If an individual county cannot meet these requirements, then a multi-county clustered DMO should be considered. If the clustered DMO cannot meet these requirements, then the intention to establish a DMO in the area in question should be abandoned.

Recommendation 5: DMOs should provide business support for tourism SMEs

It is recommended that a business support programme for networks of tourism SMEs should be established and facilitated by the regional DMOs, in association with RDAs, local government, local tourism trade associations, and the Chamber of Commerce. This is essentially a capacity building recommendation for owner/operators in small tourism business who do not have the time to commit to more formal programmes of training. “Tourism Learning Groups” should be established locally in a town, village, or a rural area, and should typically involve between 15 – 20 members. Typically, it will be the role of the DMO to hire a panel of business development experts in the local area, to lead and facilitate these groups, to agree particular tasks to be carried out, and to pay their fees. Clearly this type of business support service will evolve at the pace that the DMO network itself is established and evolves.

Recommendation 6: Establish a funding mechanism to support the development of a regional DMO network

To support the development of a sustainable network of DMOs in Romania, and subject to the development of a supporting legal framework, the Ministry should give consideration to providing supplementary funding to support selected regional DMOs as they seek to establish or expand their operations. This should specifically cover any shortfall in core funding from primary sources (Tourism Promotion Tax) in addition to contributions from Municipal and County Councils during this crucial period. This funding could be i) available for a time-limited period (1-2 years); ii) available for selected regional (multi-county) DMOs with sufficient critical mass to achieve “cut through” in international markets; iii) limited to a ceiling of, for example, EUR 150 000 (60% of the core budget); and iv) require matched funding from other sources (private sector, EU etc.). Potential DMOs would likely be drawn from the core set of high-performing counties presented in Figure 7.1, and based on criteria laid out in the Roadmap at Annex A: Roadmap for the operationalisation of Tourism DMOs in Romania. Following this pilot phase, it is envisaged that two additional DMOs per year for a further three years could be supported under similar arrangements, to achieve a network of eight regional DMOs over a four-year period.

Recommendation 7: Capacity Building

In order to establish consistent practice in relation to tourism funding and spending arrangements, it is recommended that a number of capacity building workshops should be delivered which will bring together all relevant stakeholders, including elected public representatives, public sector organisations, private sector tourism firms and associations, RDAs, and representatives of the local government state audit authority. The purpose of these capacity building workshops will be to ensure that all stakeholders associated with DMOs and their operations have a shared understanding of the legal and financial framework within which funds are raised, and the procedures governing the subsequent disbursement of those funds on operational programmes.

Part II Operating Manual

Section A: Delivering Destination Management – Concepts, roles and responsibilities

8 Establishing a Destination Management Process

The context of the Romanian DMO Development Roadmap

The DMO roadmap document, which outlines the necessary actions, roles, and rough timelines for Romania to develop a network of DMOs, proposes two categories of DMOs: one at county/regional; the other at local/municipal level.

Defining Destination Management

Destination management (DM) is a process that enables destinations to maximise the value of tourism for residents, businesses and visitors, while ensuring the sustainability of the economic, cultural and social environment.

It involves the "coordinated management of all the elements that make up a destination (attractions, amenities, accessibility, human resources, image and price). Its role is to lead and coordinate activities under a coherent strategy or plan, serving the interests of all stakeholders."[6]

This operating manual refers to DMOs at two sub-national levels in Romania – the county/regional level and the local/municipal level. There are many common principles, but also differences, in terms of the primary focus and functions.

The steps towards Destination Management

The first step in the DM process is for one or more key stakeholders within a destination to prepare (or commission) a tourism strategy and action plan[7] for the destination. This should identify the range of organisations that need to come together in a DM partnership to implement the strategy and action plan.

Preparing a tourism destination strategy and action plan[8]

The purpose of a tourism **destination strategy** is to provide direction for a long-term programme of tourism destination development, management and marketing, set clear priorities and guide decisions on the use of resources in a plan of action. The Vision and the broad strategy may be for ten or more years ahead. The Action Plan is normally for 3-5 years.

The Strategy should be designed to answer three basic questions:

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[6] Source: World Tourism Organization (UNWTO), 2007, A Practical Guide to Tourism Destination Management.

[7] This may also be called a 'Destination Management Plan' or a 'Destination Development Plan'.

[8] This section draws on concepts and content prepared originally for The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming).

- Where are we now?
- Where do we want to be in 10 years' time?
- How are we going to get there?

A local strategy should reflect and complement the strategy of the region in which it is situated. Ideally, regional and local strategies should be produced as part of an integrated exercise, at the same time, by the same people, to ensure consistency of analysis and policy development.

Typical components of tourism destination strategies are shown in Table 8.1:

Table 8.1. Tourism destination strategy components

Strategy component	Relationship between regional and local
• Tourism vision, growth objectives and targets	• Inter-related regional and local
• Key long-term policies to achieve objectives and targets	• Local policies should fit within the framework of regional policies
• Identification of a limited number of Strategic Priorities as the focus for action	• Local and regional priorities should be complementary
• A positioning and branding strategy, differentiating the destination from competitors	• Local positioning and branding should fit within the framework of regional positioning and branding
• Identification of target market segments, their profiles and preferences	• Local target markets should be consistent with regional target markets, which should in turn reflect local needs
• Identification of a portfolio of products and experiences to be created by entrepreneurs and stakeholders to attract/satisfy target market segments	• Regional strategy should identify required products and experiences, to be incorporated in local strategies and action plans
• Assessment of factors that are critical for success, and the implications	• Inter-related regional and local
• A plan for action, including establishing the mechanisms and resources for implementation.	• Inter-related regional and local

The process of developing the strategy normally includes: researching tourism markets, resources and impacts, stakeholder consultation, competitor analysis (budgets and activities) of competitor destinations and strategy development workshops involving destination stakeholders (Box 8.1).

The **Action Plan** should flow from the Strategy. It should be developed in partnership with the key stakeholders involved in implementation and identify the actions that each of the stakeholders should undertake, and performance measures for each area of activity. The action plan should have a time frame of three to five years, focusing on proposals for action that will:

- Implement the strategic priorities, each having its own set of actions
- Stimulate and coordinate the development of products and experiences by different destination stakeholders, to create more compelling offers for visitors
- Prepare pre-feasibility analysis providing initial indication of viability of major development proposals
- Provide direction and coordination for the marketing activity of the destination stakeholders, in order to maximise impact
- Identify ways of securing resources, through well researched and presented cases
- Identify the need for spatial tourism master plans, particularly for areas designated for tourism development
- Identify roles and responsibilities for implementation, with timelines, key milestones and recommendations for new implementation structures, including new or strengthened DMOs. Regional Action Plans should include action to be implemented at the local level, with agreement of the organisations involved.
- Establish a framework and mechanisms to measure and manage destination performance.

Box 8.1. Examples of European tourism destination strategies

- Edinburgh 2020– The Edinburgh Tourism Strategy (Scotland) The Strategy aimed at increasing the value of tourism to the city and to its tourism industry by creating a thriving, profitable tourism industry and delivering high levels of economic, cultural and social benefit to Edinburgh and Scotland as a whole. It had the supplementary aim of enhancing the city's image and reputation.
- Derry City & Strabane District Tourism Strategy 2018-2025 (Northern Ireland) set the ambitious targets for 2025 to double visitor spend to GBP 100 million, and to create 1 000 new jobs. A Tourism Delivery Partnership has been established to oversee the progress of the strategy.
- Newry Mourne & Down Tourism Strategy 2017-2021 (Ireland) aims at assisting Northern Ireland achieve its targeted growth rate of 6% per annum in overnight expenditure by focusing on developing visitor destination experiences that will deliver 'EPIC moments'. building a unified and entrepreneurial industry that is customer-focused, and ensuring that the development of tourism is undertaken sustainably.
- Sibiu County Tourism Association Action Plan (Romania) includes an audit of the tourism resources and general travel trends, a detailed description of visitor profile and of the main target markets. The plan sets regulars consultations with local actors, the local community, and the visitors, actors that should in view of consolidating the destination's participatory governance.

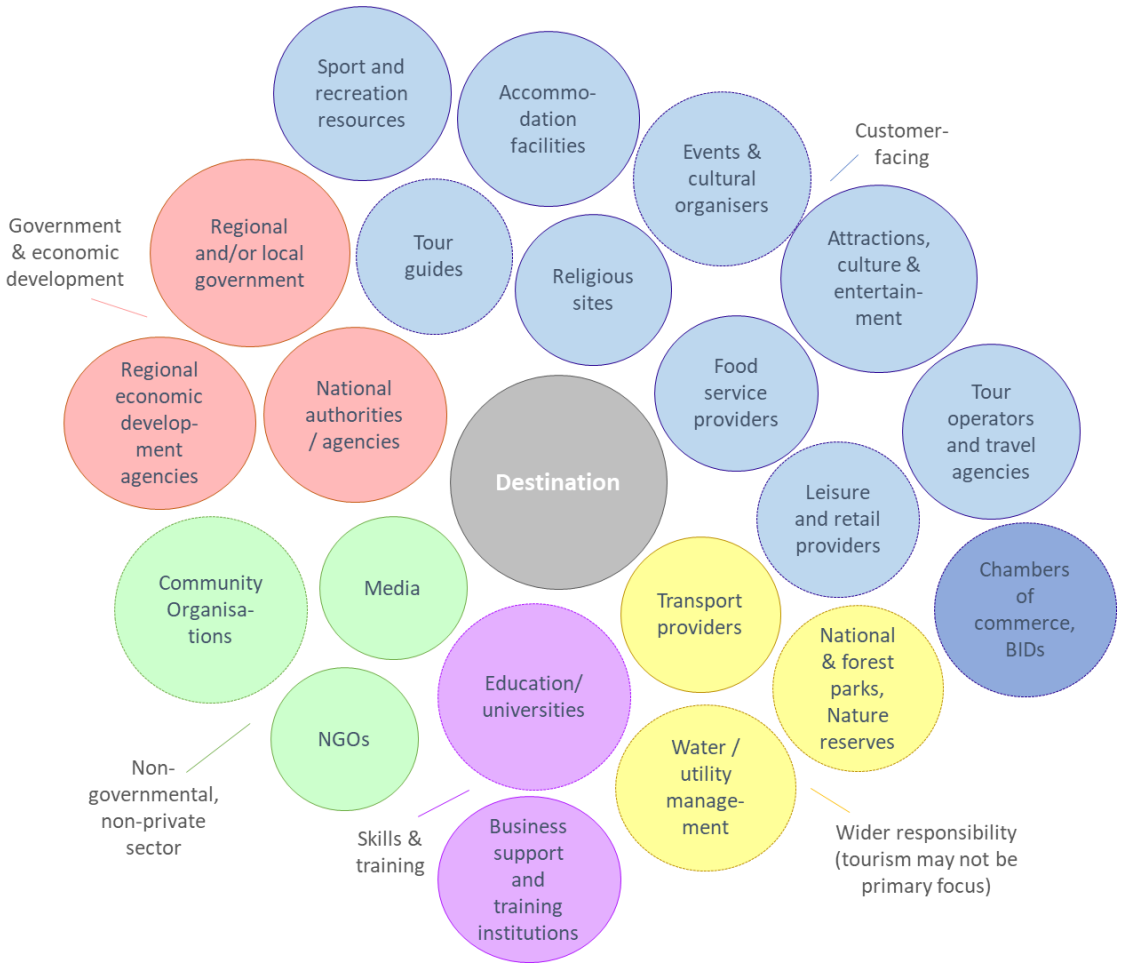
Additional links to examples of tourism destination strategies and action plans are provided in Annex C: Tourism Destination Strategy Examples.

Creating a partnership for implementation

To implement the tourism strategy effectively, it will be important to create a DM Partnership that will bring together all the key stakeholders who have a key part to play, in respect of their own roles and responsibilities. By coming together in a partnership, they can not only coordinate their actions, but, more generally, they can combine their resources, skills and influence. Most will be motivated to support the strategy implementation (and hence the DM agenda), because it directly affects their core interests and because they have been engaged during the process of the strategy development.

The types of stakeholders that may be involved are shown in Figure 8.1. This demonstrates that the partnership needs to be wide ranging, covering many different sectors and categories of organisations. Ensuring that partnerships of this type work effectively is very challenging and requires a strong coordinator at the centre of the process, acting like a 'conductor of the orchestra'. In Romania, this could be a regional development agency, a county council, a municipality or a tourism destination management organisation (DMO). If there is an existing DMO, it will probably need to be strengthened to fulfil this role. If there is not a DMO, then one will need to be established – the process and timescales for which are outlined later in the report.

Figure 8.1. Destination stakeholders, including potential implementation partners



Leadership

Successful destination management requires effective, high-level leadership to a wide-ranging group of stakeholder organisations, who have substantial common interest (in the success of the destination), but who may need inspiration and/or facilitation to engage in partnership working. Such leadership necessarily involves:

- Obtaining the agreement and active support of key stakeholders to work together in developing tourism on the basis of a jointly agreed strategy and action plan (as outlined above)
- Instigating the programme of research and consultation required to prepare the destination vision and strategy
- Creating the structure and the resources to implement the strategy and action plan and to measure and mange performance
- Ensuring that this process has the backing of key influencers and funders from public and private sectors.

To this end, the Chair of the DM Partnership and/or DMO should be someone of great influence within the destination, who is well regarded by all sectors involved in tourism. He/she will need to have strong interpersonal communication and networking skills, as well as be adept at dealing with sensitive issues.

9 Scope of destination management activities

Destination management functions

Implementation of the destination strategy and action plan requires the delivery of a wide range of DM functions. These can be divided into 'core functions' that directly impact on the development of tourism and the achievement of DM aims and objectives (such as Competitiveness, high-quality visitor experience, sustainability); and activities that enable or support the effective delivery of the core functions (Figure 9.1).

Figure 9.1. Core and enabling DMO functions

Core functions	• **Research and intelligence**
	• Strategic planning
	• Destination marketing and sales
	• Visitor Services
	• Destination and product development
	• Events planning and development
	• Skills development
Enabling functions	• Partnership development & management
	• Advocacy and corporate/industry communication
	• Application of digital systems and applications
	• Administration and finance

The following table indicates the types of function that might be undertaken at each level in Romania (Table 9.1). Regarding the organisations involved:

- At the local level, it is likely that several organisations, including a local DMO and/or municipal tourism department(s), will be involved in delivery.
- At the regional/county level, most of the delivery is likely to be undertaken by a regional DMO and/or tourism department of County Councils working together.
- At the national level, most of the delivery is likely to be undertaken by the Ministry, possibly with support from other Ministries, particularly relating to training and education for tourism.

Table 9.1. Core functions undertaken at local, regional and national level[9]

Function	Local	Regional/County[10]	National
Research & intelligence (R&I)	User of regional R&I knowledge base	Preparation of regional R&I knowledge base, using international, national and regional sources. Supplementing national research, as required, to meet the specific needs of their destinations	**Primary role** in commissioning market and economic research. Realisation of future potential for 'big data' analysis. Advice/ framework for regional research
Strategic planning for local and regional destinations	Preparation of local plans within framework of regional strategy	**Primary role,** producing regional tourism strategies within framework of national strategy, with national support and local involvement	Supporting role – providing strategic advice and research input to regional strategies
Destination marketing & sales	Local marketing within region. Supporting role through engagement in regional partnerships for international and domestic marketing.	**Key role supporting national marketing**, by forming regional marketing partnership (including main local tourism organisations) + working with other regions. Primary role in domestic marketing, coordinating with local level **Primary role in gathering, managing and distributing digital content**, using national platform	**Primary role in international marketing,** focusing on types of experiences that are most attractive for target markets. **Provision of a national content platform** with a range of distribution channels used by target markets.
Visitor services	**Primary role for provision of 'on-the-ground' services**, within framework of national VS strategy and standards + regional information network	**Primary role** for the development of digital information services. Coordination of regional information network	Development of national VS strategy and standards
Destination & product development	**Primary role in Creating an attractive public domain Creating or enhancing tourism products and experiences** to attract target markets.	**Primary role in packaging of existing experiences** on a thematic basis, in partnership with other regional DMOs and the national authority	Support (advice and/or funding) for development of primary experiences for target markets.
Events development	**Primary role in creating or enhancing events** to attract target markets	Support for major tourism events and coordination of events involving multiple destinations, in partnership with national authority	Support for national events and coordination of events involving multiple destinations, in partnership with RTOs
Skills development	**Primary role in delivery and promotion of training opportunities to tourism businesses.**	Coordination of education and training suppliers to ensure availability of suitably trained staff	**Primary role in strategy** for recruitment and training of hospitality staff

Further detail and examples good practice in relation to core and enabling functions of DMOs can be found in Annex B: DMO functions - Reference documents.

[9] Boxes with green edges show primary roles

[10] The term 'regional' is used here for individual counties, groups of counties or areas covered by a Regional Development Agency

10 Potential DMO functions and activities

The DM Partnership should decide which of the DM functions the DMO should undertake in implementing the strategy and action plan; and likewise, the functions that should be undertaken by other organisations based on their work programmes, resources and legal responsibilities (Table 10.1).

Table 10.1. DMO functions and activities

Function	Potential implementation partners	DMO role
Research & intelligence	Partnership between: DMO, NTO, local govt, RDA, NGOs	Many DMOs gather **research and intelligence** from international, national and local sources to guide the destination strategy and their own operations, help tourism businesses develop and promote their operations most effectively, and monitor destination and DMO performance. Some commission primary (original) research of their own, to meet the specific needs of their destinations.
Strategic planning for destination	Partnership between: DMO, NTO, local government, RDA, NGOs	DMOs often have the responsibility of **developing the destination strategy, its related implementation plan(s) and overseeing its implementation,** working closely with major stakeholders and partners. In smaller DMOs, this may be handled by the DMO's chief officer, but in larger DMOs, it may be a separate function, usually linked to research. In many destinations, the strategy development and implementation is undertaken/ commissioned by the municipality or economic development agency, with the DMO as a key partner.
Destination marketing & sales	DMO with support from public and private sector partners	Nearly all DMOs have a **leisure tourism marketing** role, normally marketing direct to consumers and through the travel trade. DMOs in large cities or major tourism destinations usually have a **business tourism marketing** function as well, dedicated to the meetings and conventions market, for which they often establish a Convention (or Conference) Bureau. **Destination branding** may be undertaken by the DMO as an integral part of its marketing; or in conjunction with partners that have an interest in branding of the destination as a place to invest, live, work and study.
Visitor services	DMO and/or local authorities	Most DMOs provide **information services** for visitors - traditionally through visitor information centres and local distribution outlets, but increasingly through **digital channels.** Integral to this is obtaining accurate, up-to-date information from a variety of sources and tourism partners to make available through multiple outlets and digital channels under a coherent brand voice and content strategy. DMOs can be involved in **developing and managing tourism operations**. These may best be handled through subsidiary companies, ensuring they do not affect the financial and human resources of the DMO's core operations.
Destination & product development	Partnerships between national/local government, RDA (+ DMO and NTO?)	For many DMOs, particularly in emerging destinations, it is important to be involved in **product development**, a term that can mean either: (1) packaging of existing products in new ways, or; (2) creation of new tourism products and experiences. If the need is for (1), this is normally handled as part of the leisure marketing function. If the need is for (2), the DMO would need to work with entrepreneurs, communities and/or municipalities to develop experiences, requiring different planning and development skills to test, package and promote new products to potential customers.
Events development	Partnership between local government, events development agency, DMO/ Convention Bureau	Many DMOs are also involved in **developing and promoting festivals and events**, as a way of attracting more visitors, particularly off-season. This may be through bidding to host existing events (e.g. sports tournaments or annual conventions that go to new locations) - a process the DMO can lead through its convention service if it has one. Or, more often, by supporting the creation of new events specifically for the destination. The DMO should be involved in identifying opportunities and planning for such events, but the operation of the events is best undertaken by an organisation dedicated to the task.
Skills development	Partnership between local government and training providers	The DMO may be involved in providing **training and/or business advice** for sectors of the tourism industry, led by the DMO or specialist organisations working with the DMO.

In most aspects of DM activity, there is a need for destination stakeholders to work together in effective partnerships. The following are general guidelines relating to the core DM functions.

Some DMOs are involved in implementing **quality assurance schemes**, of the type illustrated in Box 10.1, normally as an agent for the national tourism authority. These schemes are mostly for accommodation, but in some countries also for visitor attractions and other services.

Box 10.1. Spanish Integral Tourism Quality System in Destinations (SICTED)

The Department of Tourism of the City of Málaga recognises the importance of fostering quality in the tourist facilities and services of its destination. Since 2017, the Department adheres to the Spanish Integral Tourism Quality System in Destinations (SICTED), which is a good example of publicly-lead DMO network development and network coordination.

Established in 2000 by the Secretary of State for Tourism, SICTED has the overall objective of improving the experience and satisfaction of visitors to Spanish destinations. The project aims to improve the quality of tourism destinations by creating a permanent system/structure of quality management, establishing basic quality standards through good practice manuals and training. Evaluators evaluate the process and award the label 'Commitment to Quality Tourism' to destinations fulfilling the criteria.

SICTED represents a network of nearly 200 local DMOs, involving nearly about 8 000 businesses and other organisations. Collectively, those companies employ approximately 520,000 workers in the Spanish tourism sector (19% of total), generating a total gross income of about eight billion euros (representing 13% of total income in Spanish tourism sector).

SICTED is a multi-player network, directed and coordinated at the national level by the Secretary for Tourism. SICTED operations are carried out through agreements between the Secretariat of State for Tourism and the public company SEGITTUR. The SICTED support team includes approximately 15 full-time staff belonging to both organisations. The Secretary owns the methodology by implementation cycles and also awards distinctions to tourism companies/services that pass the process. SICTED is supported by the Spanish Federation of Municipalities and Provinces (FEMP) and other administrations such as the Autonomous and Provincial Councils. The Inter-Destination Committee is composed of representatives of Destinations, Public Administrations and other participating organisations. The local DMO (in our example, the Department of Tourism of the City of Málaga) is the public or public/private entity responsible for implementing the project in the destination, engaging tourist companies and services in its territory to adhere to quality standard.

It is difficult to establish and/or operate an effective DMO for a destination with a small-scale tourism industry and/or limited municipal investment in tourism. Even with the most cost-effective technologies, a critical mass of human and financial resources is necessary to achieve impact and remain viable financially.

Critical mass can be achieved through one or a combination of the following[11]:

- Administrative authorities at local/county level join forces to develop/establish a DMO with sufficient scale
- DMOs combine operations with one or more DMOs from adjacent destinations, ideally where there are similar target markets and opportunities for strengthening the product offer

[11] The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming)

- Combine operations with organisations responsible for marketing other aspects of the destination, reducing operational costs and achieving synergies in branding and marketing
- Combine operations with organisations responsible for the management of parts of the destination.

There is a process of evolution in the way a DMO works. Over the first few years, if the DMO becomes established and the tourism development program starts to achieve impact, numbers of tourism businesses and stakeholders and levels of profitability should increase. This can provide the opportunity for strengthened DMO structures to emerge and for the DMO to take on additional responsibilities. Such opportunities should be identified in the business planning process.

However, it may become apparent through experience that a DMO does not have sufficient scale for viability, in which case the options outlined above can be considered.

11 DMO governance and funding

Generation of funding

For DMOs around the world, it is often a considerable challenge to generate the funding necessary to deliver strategic and operational benefits to a wide range of public and private sector stakeholders. DMOs in Romania will have a significant advantage with core funding from the tourism promotion tax. The Vienna Tourist Board, one of the most successful DMOs in Europe has a similar advantage (Box 11.1).

Box 11.1. DMO funding through local accommodation tax in Vienna, Austria

The Vienna Tourist Board (WT), has been in existence for over 60 years. It is a formally constituted body, public entity, and not-for-profit, whose governance, remit and funding structure are prescribed in legislation. Through its governance structure WT is closely linked to the city government of Vienna. As a result, WT is a stable, well-resourced DMO with strong relationships with the city administration, assisting it in developing and implementing effective tourism policies for the city.

Although part of and governed by the statutes of the Local Authority, WT has partnerships with a broad spectrum of public and private institutions and businesses, both within the tourism sector and beyond.

84% of WT's budget comes from a local accommodation tax. Funding from the City Council (5%) and Chamber of Commerce (2%) makes up a further 7%. WT also generates its own income through accommodation booking services, sales of advertising in its own publications, and contributions from partners (from Austria and abroad) in joint marketing promotions.

The aim should be to maintain this core funding, whilst generating increasing operational funding from other sources (Box 11.2), including:

- Membership fees paid by tourism businesses
- Payments by tourism businesses to participate in promotional activities, training and other activities
- Contributions by national and local government to support specific campaigns or projects
- Online and offline commercial activity including sales of merchandise, guidebooks and maps, tours, activity and event bookings, etc.
- Project funding from EU and other donor organisations.

Box 11.2. Securing private sector funding for Visit Cork, Ireland

Cork City Council, Cork County Council and the national tourism development authority, Fáilte Ireland, work together in a partnership for the City and County of Cork.

The three authorities commissioned a tourism strategy to provide strategic direction for this new area of responsibility and established a DMO - Visit Cork (https://purecork.ie) - to lead and coordinate the implementation of the strategy. Visit Cork is based on a Public Private Partnership (PPP) model, and incorporates the Cork Convention Bureau which was itself already in operation as a PPP.

The initial funding for the DMO was provided by the three organisations, but Visit Cork was charged with securing private sector funding and, to this end, set up a membership scheme with fees, additional pay per use courses and promotional events. It also continued Cork Convention Bureau's partnership with major hotels, who provide in-kind support e.g. personnel for telesales or tradeshows. The tourism strategy is linked to the City's economic development strategy, with the aim of improving all areas of the city. Cork City Council ring-fences 1% of all rates revenue for an economic development fund, with an annual marketing budget funded from this source.

Operational structure

The organisational structures of DMOs vary significantly, reflecting the size of the organisation and its budget, its priorities the range of functions that it undertakes and the breadth of expertise of the individuals who work for the DMO. Three examples of DMO staffing structures are shown in Box 11.3 while Annex D: Example Operational Structures provides more detailed examples.

Box 11.3. European examples of DMO operational structures

Visit Cork (Republic of Ireland)

The destination developed a new partnership strategy 'Growing Tourism in Cork – A Collective Strategy', and proposed a new body to lead and coordinate the implementation of the strategy. The Visit Cork Ltd DMO (https://purecork.ie) was established, incorporating the Cork Convention Bureau, which was already in operation as a private-public partnership. Visit Cork has a membership program with fees, additional pay per use courses and promotional events. Cork City Council dedicates 1% of all rates revenue for an economic development fund with an annual marketing budget of EUR 750 000 funded from this source. Visit Cork has an implementation structure based on that of the successful Cork Convention Bureau. Visit Cork Ltd is the over-arching organisation, comprised of i) a Steering Group (gatekeeper of the overall strategy), ii) a Board of Directors, and iii) 'The Executive' - A Tourism Destination Manager. Overall, Visit Cork employs three staff: Head of Visit Cork, Cork Convention Bureau Manager, and Coordinator.

Franciacorta Wine route (Italy)

The promoters of the Franciacorta Wine Route Association identified the development of cultural food and wine tourism as a new driving factor for the further development of an eco-friendly visitor economy on a territory with an interesting landscape and environment, with a rich historical and architectural heritage, and high quality agricultural and gastronomic products, in particular the wines with the Franciacorta denominations.

The Franciacorta Wine Route Association is a non-profit organisation headed by a President (and Office of the presidency) and administered by a Board of Directors, composed of five to eleven members. The association also has a Board of Auditors and an Assembly of Members.

The members are divided into four categories: i) Founding members, ii) Ordinary members, iii) Supporting members (support initiatives), iv) Honorary members. The association is funded through membership fees. Members and supporter members pay: an initial registration fee; an annual membership fee (which differs by member type) and a proportional annual fee (which also differs by member type). Financial contributions from institutions, other associations, private individuals add to the budget.

Sibiu County Tourism Association (Romania)

The Sibiu County Tourism Association (SCTA) is a not-for-profit public private partnership, created at the initiative of Sibiu County Council for the development of tourist infrastructures and the promotion of tourist resources to increase Sibiu county's attractiveness as a tourist destination. The Sibiu County Tourism Association grew from nine members in its inception in 2005 to 44 members in 2019. Its members include public sector organisations, NGOs, travel agencies and other private sector organisations. The Association acts as a networking / platform for cooperation and collaborates with over 800 local partners in the destination involved in the tourism, cultural, agricultural, environmental, academic and administrative sectors. The Association operates with a small executive team, made of 5 members of staff.

The management of the Association is provided by a Board of Director with a three-year mandate, which counts nine members, five from the public sector, four from the private sector and one financial supervisor from the county council. The Association works in line with its annual action plan, developed in collaboration with its members. Results are reviewed annually and recorded in annual activity reports.

Financial control of the Association is provided by an auditor from the Sibiu County Council. The Association has an annual income of around EUR 250,000. The Association spends the majority of its annual budget on marketing (41%), about 38% on staff and operations and 22% on development activities.

The role of the Governing Body

DMOs will have to have some form of governing body, which has overall responsibility for the management of its business. This body, here called a 'Board', can delegate responsibility for some/all operational decisions to the management employed by the organisation. The primary responsibility of Board members is to enable the success of the DMO in achieving its objectives.

A combination of appointment methods can be applied (Table 11.1). The methods of appointing Board members should be included in the organisational charter.

Table 11.1. Methods for appointing the Board of Directors

Appointment method	Chair / Deputy Chair	Board Members
Elected by the membership as a whole	✓	✓
Elected by the Board	✓	
Appointed on an ex-officio basis (e.g. Chair of County Council)	✓	✓
Appointed by public sector bodies or other major funders	✓	✓
Appointed by private sector associations or major private funder		✓
Appointed by a selection committee through an open application or headhunting process	✓	✓
Co-opted to undertake a particular role or task		✓

The most important factor in enabling the Board to operate effectively is that its members should together have a good mix of skills and experience, so that policy discussions are well informed. It is helpful also if Board members, include a balance of geographical areas and tourism industry sectors.

Visit Cork (Ireland), for example has a Board of directors made up of two representatives from the local authorities (Director level or above), two councillors, Fáilte Ireland (the national tourism development authority), Cork Airport and up to 6 people from industry. In Italy, The Franciacorta Wine Route Association is administered by a Board of Directors, composed of five to eleven members.

"In strategic terms, the most important role of the Board is to agree to the Business Plan and the budget, from which many other decisions will flow. It is the job of the DMO management to prepare the Business Plan (see below), the primary aims of which should be to enable the DMO to fulfil its role in implementing the tourism strategy and action plan for the destination and to help tourism businesses in the destination to achieve sustainable commercial success."[12]

[12] The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming)

Business Planning

The **Business Plan** should be a practical plan to guide the DMO's programme of work over a three to five-year period, against which progress and achievements can be monitored. It should:

- Describe the organisation, its purpose and its relationship with other bodies, particularly in delivering the destination strategy and action plan, if one exists – if not, an early task must be to prepare one
- State the mission, aims and objectives
- Define the business model and the anticipated funding/resources for the organisation, including human resources, offices, ICT systems, etc.
- Set out the programme of planned activities and the budget for the following year

The following examples of DMO business plans illustrate different structures and components:

- Destination Gothenburg (Sweden) has a two-year Business Plan which ties in to their longer-term sustainable development objectives and sets clear and measurable objectives for the destination's areas of focus. The Plan was developed through broad collaboration with stakeholders, through workshops and interviews.
- Destination Osoyoos' (Canada) Business Plan is a five-year strategy for a local area within the Thompson Okanagan region in Canada. The plan includes goals, objectives, strategies and key actions based on input from the industry as well as from a situation analysis. Details of funding sources are also provided.
- Visit Derry Corporate Plan (Northern Ireland) includes a 'corporate scorecard' for measuring success through identification of strategic objectives and implementation methods to achieve targets Recruitment of staff

In Romania, DMO staff numbers can range from a few staff in local DMOs, where budgets or functions may be limited, to 15-25 in regional DMOs. The staff skills, knowledge, and experience required will obviously depend on the functions to be undertaken. In regional DMOs, core staffing is likely to include Chief Officer, Marketing, Visitor Services, Strategic Planning, Research & Development, Partnership Development/ Communications and Finance & Administration. The last requirement may be provided by a stakeholder organisation, particularly if the DMO is hosted within such an organisation. At the local level, in accordance with the DMO Roadmap, the skills requirements are likely to be on Destination and Product/Experience Development, Events Development. The Chief Officer of the local DMO may well handle the local marketing, which should be part of his/her skill set.

12 Process and timescales for establishing new DMOs

Engaging key stakeholders in a Steering Group to set up the DMO

The DMO Roadmap sets out a process for establishing regional/county+ DMOs, with the Regional Developments Agencies playing a key role in initiating and supporting the process. In each of the agreed regional DMO areas, it will be sensible to establish a Steering Group of key players to oversee the process. When the DMO is formally established as a legal entity, the Steering Group will be replaced by the Board. At the first General Meeting the constitution will be adopted, the first-year budget agreed and the Board formed.

Engaging the Director/CEO

One of the Board's first tasks is to recruit a Chief Officer. It is best that this is done through open competition, with a formal recruitment process and advertising of the post widely, to ensure fairness and accountability.

The Chief Officer should have senior management experience and strong operational skills in running comparable tourism or tourism-related organisations, direct experience of tourism, either private or public sector, and senior level operational experience, with proven leadership and motivational skills. Other requirements may include entrepreneurial acumen to build profitable commercial activity for the organisation, strong communications skills and the ability to manage effective relationships and forge partnerships.

The Chief Officer will be responsible for the general management of the organisation, but may well have specific responsibilities as well – for example, to prepare the Business Plan and budget; to prepare the strategy and develop strategic partnerships; and to manage the programme of performance measurement and management.

Preparing and agreeing the Business Plan

As part of the development process, a draft Business Plan should be sent to key stakeholders for comment, with a revised version submitted to the Board for adoption. It may then be submitted to key stakeholder organisations as the basis of a funding application - ideally, for a three to five-year period.

Setting up offices and office services/systems

During a DMO's initial years, it will be particularly helpful if offices and related services can be provided by one of the DMO's major stakeholders. This is likely to be relatively economic and would allow DMO staff to focus on policy development and implementation. Apart from obtaining offices and equipment, other requirements include: personnel matters; health & safety; financial accounting; insurance; computer security and data protection.

Indicative timetable

An indicative timetable is shown below for the setting-up process (Table 12.1). The amount of time that will be required in practice will depend on local circumstances. Tasks 1 and 2 will require agreement and commitment from key stakeholders before practical work begins - i.e. Task 3 onwards.

Table 12.1. Indicative timetable to establish a DMO

Tasks	Months							
	Pre	1	2	3	4	5	6	7+
Engaging key stakeholders in a Steering Group	■							
Securing resources (staff and money) and preparing Year 1 program and budget	■							
First Gen Meeting for formation of Board and approval of Year 1 program/ budget		■						
Engaging Chief Officer		■	■					
Preparing Business Plan, funding model and budget			■	■				
Generation of funding				■	■	■		
Obtaining offices and related services				■	■	■		
Recruitment of staff							■	■

Source: The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming)

Section B: Destination Management in Practice

13 Core DMO functions

Research and intelligence

Research and intelligence (R&I) is undertaken by DMOs and partners to ensure strategy development and operations decisions are evidence-based. It can be designed also to provide data and intelligence that will be of value to tourism businesses, relating to markets, marketing opportunities and news about the destination. Benefits to be derived from R&I include, understanding:

- the performance of the destination and of the DMO (Box 13.1)
- current and potential markets
- the tourism business landscape in the destination
- external trends and competitors

Box 13.1. Evidence-based destination management in Vienna, Austria

A DMO that is part of the city government but operates in a similar way to a private sector company, using a research and evidence-based approach to strategic and operational planning. The Vienna Tourist Board (WT) collects extensive information on tourism volumes and trends from data provided by Vienna City Council from local accommodation tax income, and the underlying data on activity. WT also carries out regular surveys and data collection of its own to understand activity in the tourism market, trends in its various target markets, the impact of its advertising and promotional activities, and the profile and characteristics of its visitors. It also partners with Schloß Schönbrunn (a major tourism attraction on the outskirts of Vienna) in developing the VTI (Vienna Tourism Indicator). This seeks to forecast changes in visitor volumes from specific geographical target markets, using statistical information and expert opinion.

Methods

The extent to which a DMO will undertake its own research and intelligence activity will depend on the scale of its operations, its financial resources and its in-house expertise analysing existing local, regional, or national tourism data. Regional DMOs in Romania, with their strategic responsibilities, should certainly undertake analysis of existing relevant local, regional, or national tourism data and consider undertaking primary research, in terms of surveys of i) visitors to the destination (Box 13.2), website users, tourism businesses, residents, accommodation and attractions; ii) data gathering/analysis; iii) competitor analysis for benchmarking; iv) marketing effectiveness research and, if possible, v) in-market surveys, allowing market segmentation and selection of target markets.

Box 13.2. Visitors Surveys in Gothenburg, Sweden

Göteborg & Co is the official DMO for the city of Gothenburg and is a municipal company of the City of Gothenburg. Collaboration is a key element of Göteborg & Co's work which acts as a platform for collaboration. Göteborg & Co has formed long-term partnerships with public and private stakeholders at local, regional, national and international level. Göteborg & Co is part of, and is the parent company of, the Tourism, Culture & Events cluster with Liseberg amusement park, Got Event and Gothenburg City Theatre.

Research and development, including knowledge of business and external market trends, has been a strong focus of Göteborg & Co's operations since its inception, having a role of knowledge hub and network builder. In order to enhance this role, the Research & Development department was set up in 2018. In 2018, the department gathered data following major events in the city, while data was also collected on the tourist centre's service to visitors. A project was also initiated with the visitor industry to develop a framework for a survey of the various groups of visitors to the destination.

Outlined in Table 13.1 are selected research and intelligence exercises, and associated methods of implementation, that may be particularly relevant for Romanian DMOs at the local and regional level.

Table 13.1. Research & intelligence – purpose and methods

Research/ intelligence type	Used to measure	Methods
Surveys of visitors to the destination	• Visitor profiles • Details of trip • Satisfaction • Spending • Growth in demand • Information sources used • Other destinations considered	• Commonly administered in the form of exit surveys at air, road, rail and sea exit points, but may also be at accommodation establishments, at popular tourist attractions, or follow-up online surveys. Where and how they are administered (for example by trained interviewers, or as self-completing questionnaires) and the format of questions varies according to: ○ Type of tourism area being considered (e.g. country/ region/ city/ attraction); ○ Type of visitor (e.g. international/ domestic/ overnight/ same-day) ○ Type of information sought (e.g. demographics/ activities/ spend/ satisfaction)
Market analysis	• Market trends • Potential target market segments • Visitor profiles (demographics, city/city of origin, age, travel style, etc.) • Passions/activities, motivations, influences on decision making • Competitor destinations	• In-market visitor surveys (possibly using consumer panels online) • Analysis of destination coverage on social media platforms and travel sites, customer information gathered by local businesses • Analysis of in-market research and profiling undertaken for the national tourism authority
Surveys of tourism businesses	• Growth in demand • Seasonality • Attendance at attractions • Employment in main tourism sectors • Business performance/ needs • Volume and value of tourism in the destination and the performance of tourism businesses	• Industry surveys • Tourism supplier engagement and business surveys • Online forums for tourism business discussions
Surveys of website users	• 'Customer journey', and points of engagement or disengagement • Holiday intentions and destinations being considered • Reactions to/effectiveness of DMO web pages in influencing decisions	• Embedded website surveys, potential follow-up after set time period, e.g. six months • Email survey to newsletter sign-ups

Research/ intelligence type	Used to measure	Methods
Marketing effectiveness research	• Effectiveness of any type of marketing activity, particularly high budget items – for example website, search engine marketing • Engagement with social media, travel media activity • Travel trade activity • Advertising online and offline, in terms of conversion of interest to visits, consequent spending in destination, return on investment	• Visitor surveys • Marketing campaign response analysis, with follow-up surveys • Analysis of traveller reviews, comments, and ratings on tourism websites like TripAdvisor and Booking.com • Social media and reputation analysis

Performance measurement and benchmarking

A particularly important and distinct component of research activity is performance measurement and management. In implementing a medium-long term programme of DM projects, as part of a strategic action plan, it is vitally important to measure performance of the destination and of the DMO, as illustrated below (Box 13.3).

Measuring performance in relation to operational targets and strategic goals provides the basis for **performance management**, whereby operational programmes are adjusted or redesigned to improve performance. An example of this is to monitor the way in which target markets are performing or have changed. The DMO can then update its plans to enable more efficient marketing and refine its product development activities.

Box 13.3. European Tourism Indicator System in Mali Lošinj, Croatia

The Tourism Board of Mali Lošinj is the local DMO for of the island town of just 8,400 residents, is involved in organising over 250 events throughout the year, attracting approximately 300,000 domestic and foreign guests annually, with over two million overnights. The DMO set itself the goal of improving the service and the quality of provision of services and products in the destination and focusing on sustainable tourism development.

The Tourism Board in cooperation with the Town of Mali Lošinj, implements online surveys regarding the tourism satisfaction of the residents and the visitors on the island of Lošinj. Mali Lošinj also became one of the first destinations in Croatia to participate in the European Tourism Indicator System (ETIS) pilot project. Mali Lošinj now measures 130 compulsory and non-compulsory indicators, helping the DMO monitor and address annual changes. In 2016 Mali Lošinj won the ETIS award for Sustainable Development – recognising the breadth and depth of the gathered knowledge regarding the sustainable tourism practices on the island.

Source: Ministry of Tourism, Croatia.

Strategic and operational planning

This is covered in Part II, Section A, as part of the discussion on destination management functions. Specific examples are given below.

Box 13.4. Examples of DMO strategic and operational planning

Short-term tourism planning in Barcelona, Spain

In Barcelona, the Strategic Tourism Plan 2020 was launched in March 2017 by the City Hall and set up the roadmap for tourism policies in the city for the next five years. The Strategy defines:

- 5 areas: Governance; Tourism Management; Territorial Strategy; Jobs and Enterprise; Promotion and Marketing. Those areas cover 80 strategic challenges.
- 10 strategic programmes (detailing 30 lines of action and 100 measures responding to strategic challenges): Governance; Knowledge; Destination Barcelona; Mobility; Accommodation; Managing Spaces; Economic Development; Communication and Welcome; Taxes and Funding; Regulation and Planning.

Long-term tourism planning in Louvre Lens, France

Mission *Louvre-Lens Tourisme* is a tourism engineering initiative based on an integrated approach to tourism development. In 2015, the initiative was consolidated with the undertaking of a 'destination contract', putting the Government as a financer, guarantor and key partner. The contract formalises the strategy and gives a framework for all partners involved. It establishes the creation of a committee of investors and experts to analyse the risks, to facilitate projects with high added value for the territory, and ensure consistency in the destination's development. This committee includes economists, tourism specialists, journalists, urban planners, banking institutions, and businesses. The partners commit to a common shared branding and tourism development strategy and action plans.

Regional DMO strategy in Thompson Okanagan, Canada

The role of the Thompson Okanagan Tourism Association (TOTA) as a regional DMO is to promote the development of the region's tourism industry. The DMO designed a strategy was regarded as a road-map from the outset and has been used precisely as that since its launch in 2012. All TOTA activities are undertaken within this strategic context, and partners have a clear understanding of the direction that is being pursued. The strategy has been used to considerable effect in pursuing grants, sponsorships, and in helping to shape a service agreement with Destination BC. Given its central role to the work of TOTA and the way in which the organisation reports regularly against its progress, the wider industry is familiar with the document. This has resulted in a broader commitment to the strategic goals, both implicitly and explicitly, and a greater level of alignment between the activities of the various stakeholders, which in turn has produced stronger outcomes.

Marketing and sales

Romanian DMOs marketing planning and activities should include the following, with examples provided at Box 13.5:

Planning

- Identify target market segments
  - Use available research and intelligence to understand the requirements of these segments and ensure that appropriate products and services are available to meet their needs; and the most cost-effective ways of influencing each segment (techniques and channels)
- Undertake promotional activity, using appropriate and targeted marketing messages and channels
- Evaluate and review the impact of the marketing on the segments that have been targeted.

Box 13.5. Examples of destination marketing planning and activities

Targeted marketing – Vienna, Austria

The Vienna Tourist Board (WT) targets individual markets with specific messages and offerings. It has 20 identified global markets, and tailors its marketing messages, emphases and timings individually to each of these markets, rather than adopting a standardised approach. Through this policy, WT fosters each market independently, which moderates the impact of sudden changes in individual markets. WT also sends a monthly email newsletter to senior decision makers across the political and business sectors in Vienna, trailing its upcoming activities, to maximise support for these and synergies with other initiatives within the city.

Virtual reality experience – Houston, USA

Houston First Corporation (HFC) is the official DMO for the city of Houston (Texas, USA) that has used innovative digital tools to promote the destination. In 2016, in order to change misconceptions some potential visitors may have had about Houston, HFC launched a virtual reality (VR) experience putting the potential visitors at the centre of the action to discover the real Houston. HFC believes that VR experiences give a boost to marketing efforts, by helping visitors to get a feel of the real Houston, offering memorable experiences, and hopefully moving Houston to the top of their destination wish list.

Facebook campaign – Cape Town, South Africa

Cape town tourism (CTT) launched the iAmbassador campaign which leveraged the power of top international bloggers; its 'Send your Facebook Profile to Cape Town' campaign which started in 2012 and used Facebook as a tool for uncovering the City and its abundance of attractions via an interactive travel game campaign; and the 'Love Cape Town Neighbourhoods' video series in response to the growing 'travelling like a local' trend among global travellers.

Activities

- Packaging and distribution of tourism products and experiences to ensure that they are easily booked and accessed and competitive in quality and/or price
- Digital marketing, including search engine marketing, engagement with travel sites (especially TripAdvisor), social media engagement, etc.
- Developing marketing partnerships with, for example, transport operators, tour operators, credit card companies, mobile companies etc. with whom the DMO can undertake joint marketing activity. Marketing partnerships can serve to broaden the scope of marketing activities and techniques, extend market reach and target audiences and increase exposure of the destination brand.

Visitor services

In Romania, the strategic aim and focus of DMO activities in relation to visitor services are not unique. DMOs should focus on enhancing the quality of the visitors' experience of the destination in order to increase the length of stay, and maximise visitor spending and repeat visits and recommendations.

From a policy perspective, efforts should be directed to making it easy for potential visitors to plan and book their visits to/within the destination and to navigate around it, to ensure the highest quality of personal visitor welcome and information provision at key gateway, and to be proactive in supporting the DMO's branding, through the provision of directly relevant information and by facilitating the telling of major stories of interest to visitors.

The evolution of information provision

Substantial use of digital technology, based on a nationwide digital information platform, offers multiple potential benefits for both the providers and consumers of visitor information provision, including: i) Potential for visitors to access extensive consistent information through different outlets across the destination (and the country); ii) Provision of sophisticated search and route planning applications; iii) Access to new tools (Virtual Reality and Augmented Reality) to enhance visitor enjoyment and understanding of the destination; iv) Provision of information in multiple languages; and v) Tracking of visitor movements, activities and requirements. Visitor information provision must evolve, to ensure a broad, flexible distribution network that is fully fit for purpose in an increasingly digital world.

Realising these benefits to the full will require a common web-based platform of tools and content for the providers of information; and access to high quality broadband for information providers and consumers alike. This will require negotiation by and support from the Ministry of Economy, Energy and Business Environment and/or action by a strong partnership of DMOs (Box 13.6).

There will be a continuing desire, particularly by international visitors and some segments of the domestic market, to receive personal advice and printed information. Thus, there is a continuing role for Tourist Information Centres (TICs), particularly in locations with a high visitor traffic. However, such centres can be expensive to set up and operate and it may be necessary to consider ways of reducing costs – for example, deployment of ***mobile staff*** using electronic tablets and key print item(s), such as a simple attractions map/guide.

Also, ***volunteers*** may be used for visitor welcome and information at places and times of high demand. Retired people (for civic pride) and students (for work experience) make good volunteers. There may be opportunities to extend the idea further, but professional recruitment, management, scheduling and quality assurance of any volunteers will be essential to maximise the benefits. Budgets are required to meet the management costs involved.

Box 13.6. Examples of innovative visitor information provision

Redesign of visitor information service – Durham, UK

Visit County Durham is the DMO for County Durham in England. It is part of the structure of the County Council, with a public-private advisory board. With limited public resources, innovation has been essential to maintain tourism services and make money go as far as possible. Hence, a complete redesign of how visitor information is delivered post arrival has been implemented. This involved closing the county's six tourist information centres – the city's being the most prominent and expensive – and replacing them with distribution through a network of partners. The principle was to take information to the visitor, not to expect the visitor to seek it out. Visitor satisfaction with the new service is over 90%.

There is also a Visitor Contact Centre for pre-arrival enquiry handling, accommodation booking and ticket sales. It is open 7 days a week, but not open to the public for face-to-face enquiries.

Thus, whilst five information centres were lost in 2011, visitor information is now far more widely available within the county. The changes outlined were possible only because of the creation of the unitary county authority, which enabled a consistent, integrated approach across the county.

Mobile Visitor Information Centre – Cape Town, South Africa

Cape Town Tourism (CTT) developed the mobile visitor information centres in response to a rising trend of visitors using mobile and online portals to access information about Cape Town. CTT launched Africa's first mobile Visitor Information Centre (VIC) in 2014. Named Thando (love), the mobile VIC gave CTT the opportunity to meet travellers and local citizens where they are in the city and to cut overheads. The mobile Visitor Information vehicles are manned by passionate CTT team members to position an information service in high traffic areas in line with events and seasonal hot spots. The original and largest Thando has a built-in office to assist visitors in making bookings for their stay or buying tickets for events and shows. An attractive relaxation area, featuring locally designed chairs and tables, offers free Wi-Fi to visitors. CTT actively encourages use of the hashtag #thando in social media to create visitor engagement with and through the community. The Thando team reported more than 43 400 interactions with visitors during 2016. This figure represents 25% of overall visitor interactions in the CTT network.

Demand for many types of print is reducing – and many businesses are less willing to advertise in guides. The need now is to keep the number of print titles and print runs to a minimum and consider switching to use of ***print on demand***, whereby documents are printed as required for individual customers, customised to meet their particular requirements.

There should be one point of input for each type of data/content, to a single database/content management system for onwards distribution to local, national and international sites and partners. A ***content management plan*** can help to ensure that the right data/content is acquired in the most cost-efficient way for distribution to target users, whether tourism suppliers, intermediaries or end customers, through the most cost-effective channels.

Destination product development and management

Objectives of successful product development and management for Romanian DMOs should include the following, with examples provided in Box 13.7:

- Delivering exceptional tourism experiences to fulfil the expectations of target market segments
- Delivering on the brand promise – ensuring that the experience lives up to expectations
- Ensuring that tourism is developed in a way that will enable the destination to fulfil its targets and objectives, in terms of e.g. increasing length of stay and spending, spreading tourism, ensuring good business all year round.

Within the scope of the above objectives, **specific activities** normally include:

- Quality management of the public domain – public spaces (including parks and gardens); roads, verges and pavements; public buildings; public toilets; signage; dealing with litter and graffiti
- Work with entrepreneurs and communities to create new authentic visitor experiences – workshops to stimulate ideas, advice for 'start-up' activities and/or start-up funding
- Tourism business support services – advice on business planning, marketing, use of IT, access to grant or loan funding
- Planning and feasibility analysis for proposed new developments consistent with destination strategies
- Promotion of opportunities for investment in designated tourism development sites
- Creation and funding of joint (PPP) ventures where required to implement strategic initiatives
- Management of publicly owned tourism assets
- Quality Assurance of the destination as a whole (e.g. UNWTO Quest scheme) and key attractions, events and accommodation within it – preferably through a national scheme.

Box 13.7. Examples of destination product development and management

Quality requirements – Franciacorta Wine Route, Italy

The promoters of the Franciacorta Wine Route Association (*Strada del Vino Franciacorta*) identified the development of cultural food and wine tourism as a new driving factor for the further development of an eco-friendly visitor economy on a territory with an interesting landscape and environment. The route was launched through the collaboration of 90 partners, including a wide spectrum of stakeholders ranging from municipalities, wineries to restaurants, hotels and other accommodations, historic houses, wine bars, inbound travel agents, golf clubs and sports associations, artists/craftsmen/musicians, florists etc.

Members must fulfil a set of requirements to join the association and be included in the promotion of tour packages, thus guaranteeing visitors a minimum quality standard. Requirements cover a range of issues including:

- Location – the need to fall within the territory defined under the Franciacorta Route;
- Branding / Marketing – the use of the Franciacorta branding, and actively displaying the route map;
- Visitor Services – opening times; facilities (toilets, parking, wine tasting room if appropriate, wine shop etc.); foreign languages; trained staff; etc.
- Business practice – display prices etc.
- Product knowledge – of its own company and the Franciacorta Route.

Visitor Experience Development Plan – Newry, Mourne & Down, Northern Ireland

Newry, Mourne and Down (NMD) is a local government district in Northern Ireland. It covers much of the south-eastern part of the country and is a new jurisdiction, one of eleven new "super districts" arising from the reform of local government and the replacement of the former 26 districts. As a new political jurisdiction, this was not perceived as a 'destination'. In general, there was very limited collaboration between stakeholders and it was a case of having to bring together industry and communities to look at the region from a new perspective and to assess its strengths and opportunities within this alternative context.

The local government positioned the region under its headline, "Mountains, Myths and Maritime". An ***'experience plan'*** was designed to bring this new positioning to life. Experiences were developed within a creative framework that unpacked the essence of NMD in relation to the positioning statement. The experience planning process created momentum, which in turn created enthusiasm and generated an interest in working together (in some cases involving unconventional groups of stakeholders) to develop new experiences. NMD Council has played a lead role in facilitating the ongoing implementation of the experience plan. Some of the ***clusters*** are growing in strength and now tapping into other national initiatives that will assist them in building capacity. This case illustrates the progress that can be made when a strategic and focused approach is adopted and followed through to implementation.

Adventure tourism destination – North Wales, UK

North Wales is mostly a rural and coastal destination with over 250 miles of coastline, with several traditional seaside resorts, and rich countryside (including Snowdonia with three areas of Outstanding Natural Beauty) and a rich cultural and historic heritage. North Wales demonstrates a good example of the development of outdoor adventure activities to develop and position the destination.

The DMO North Wales Tourism (NWT), established in 1991, is a private not-for-profit company limited by guarantee with 1 500 members.

Over the last 5 years, substantial public funding (from various funds) has gone into the development of outdoor adventure activities facilities, including Surf Snowdonia in Dolgarrog (the world's first commercial artificial surfing lake, which opened in 2013) and Zip World (offering a range of activities including ziplines, underground trampolines and high-rope cavern adventures). North Wales has always been renowned for its landscape, seascape, countryside, heritage etc. but those new products have been the catalyst in transforming the way people see North Wales.

Events development planning and management

Culture, sport, business and other events can play a critical role in creating a positive awareness and identity for destinations (Box 13.8). They can help to promote the development of tourism during off-peak times of the year and in areas that have a particular need for economic, social or cultural development, in stimulating economic growth by establishing synergies between tourism and other sectors of the economy and society, and in creating local pride and community building.

To this end, an early task for the Destination Management Partnership would be to produce a multi-year (5-10 years) events strategy and action plan to clearly identify proposed events, resources required and the marketing implications associated with their development.

Typically, the Destination Management Partnership might undertake the following **events development activity**:

- Annual events calendar planning - partners working together to plan and implement a programme of events that will attract visitors throughout the year, with a particular focus on the times and places where the benefit will be greatest.
- Partners creating and organising new events themselves, as part of the annual events calendar
- Partners persuading and assisting cultural, sporting or other types of organisation to establish their own events or expand existing events
- Bidding for ‘footloose’ national and international events that might realistically be attracted to the destination, bringing with them their own participants and spectators
- Establishing and managing a fund to sponsor the development of new events

Investment in national and local events could be evaluated according to the following criteria: the anticipated economic benefit from the event, the anticipated level and type of media exposure, the potential for ongoing business growth and job creation, whether the event compliments the destination’s product and attractions portfolio, and the community benefits associated with the event and potential spread of economic benefits to disadvantaged areas and the hinterland.

Box 13.8. Examples of successful event planning and management

Business events and meetings in Gothenburg, Sweden

Göteborg & Co is the official DMO for the city of Gothenburg. Göteborg & Co has formed long-term partnership with public and private stakeholders are local, regional, national and international level. It is part and is the parent company of the Tourism, Culture & Events cluster with Liseberg amusement park, Got Event and Gothenburg City Theatre. It has identified private tourism, meetings and events as key elements of Gothenburg as a destination to focus on (through Gothenburg City of Tourism, City of Meetings and City of Events).

The 2015-2017 business plan for the destination set clear and measurable objectives in terms of meetings (City of Meetings) and events (City of Events) for steering priorities and activities by monitoring progress towards the objectives. Göteborg & Co recognised that events contribute to strengthen their brand and put Gothenburg on the map, while meetings contribute to improve collaboration between the research sector, industry and society. This work continued to be supported in the 2018-2020 business plan with one of its areas of focus being to encourage people to meet, through experiences, meetings and events.

Culture as an economic driver in Durham, UK

Visit County Durham is the DMO for County Durham in England. The investment in two key cultural events that had/have national reach and demonstrate the clearer focus on the brand name: 'Lumiere Durham' (the UK's largest light festival) and the 'Lindisfarne Gospels Durham' has increased awareness across the UK and abroad.

Underlying the success of these two events and probably a factor in their creation was the city's bid to be UK City of Culture in 2013. Driven by Durham County Council and Visit County Durham, the bid failed to put the city on the shortlist for the award. However, the process of bidding raised ambition levels, put culture centre stage as an economic driver for the county and created a sense of pride in the city right across the county. Without the bid support for 'Lumiere Durham' and the Lindisfarne Gospels exhibition, Durham may not have been as strong as it is, and Lumiere in particular might not have returned in 2013. In 2017, a record 240,000 visitors came to Lumiere in Durham. In November 2019 Lumiere Durham celebrates a special 10th year anniversary edition.

Skills development

During their stay in a destination, visitors come into contact with a wide range of service providers and their staff, who are at the 'frontline' of the tourism industry; in accommodation, attractions, shops, restaurants, taxis and information centres. Individual encounters will be many and unique to each tourist and will colour his/her opinion of their stay and of the destination, which in turn will affect both repeat visits and word of mouth recommendations. Action to ensure that such encounters are of a consistently high standard represents a major training challenge (Box 13.9).

Typically, the Destination Management Partnership might undertake the following **skills development activity**:

- Projection of manpower and skills requirements, based on anticipated development and tourism growth in the destination tourism strategy
- Liaison with education and training providers to encourage and support appropriate skills provision
- Working with existing and new employers to assist them in meeting their specific needs
- Provision of support from DMO, as required.

It is important that 'frontline' staff understand the profound importance of customer satisfaction and are encouraged to exceed the expectations of the visitors they serve. A skilled workforce is essential for building quality tourism businesses and, though the tourist may never see the 'back-stage' staff, (e.g. kitchen staff, housekeepers), their contribution in terms of quality delivery is nevertheless an important one. Training can also be instrumental in achieving the overall business goals and objectives of the destination.

Tourism businesses are typically SMEs who may be too under-resourced to focus on staff training or may not appreciate its importance. DMOs can play a role by emphasising the importance of staff training and promoting and facilitating such training and business development to SMMEs. DMOs can also provide strategic direction to ensure consistent, quality training is ongoing. It may be particularly relevant for communities heavily reliant on tourism to ensure that training and education about the importance of tourism is offered in schools and colleges. Apprenticeships and work shadowing can also be useful.

Box 13.9. Examples of DMOs delivering successful skills development training

Training visitor-facing staff – Roskilde, Denmark

Visit Roskilde is the DMO for Roskilde in Denmark. In 2016, it identified skills development as one of the areas they needed to develop in order to remain competitive. The aim was to improve the competences of frontline staff of tourism operators, restaurants, and retail shops in cooperation with Retail Roskilde. This resulted in 2018 in the launch of a newsletter for front staff in shops, hotels and attractions, in order to promote a common service culture for the benefit of all customers, visitors and guests. Business Forum Roskilde also organises training workshop for businesses in Roskilde.

Furthermore, VisitRoskilde encourages tourism businesses to take part in the TourismX, a nationwide initiative aimed at strengthening expertise and innovation in Danish tourism.

Regular events, workshops and training courses – Durham, UK

Over the years, the DMO Visit County Durham (VCD) has developed a series of regular events, workshops and training courses for tourism businesses and partners involved in the visitor economy:

- 'Welcome to Durham', a training programme based on World Host that incorporates product knowledge and site visits and tailors delivery methods to the needs of businesses
- VCD holds two conferences annually (Autumn and Spring) for tourism businesses and partners involved in the county's visitor economy. It usually consists of a networking lunch, keynote speakers and breakout sessions. In past years, conference subjects have included rural tourism development, quality, market intelligence, and online marketing

Vienna Experts Club – Vienna, Austria

The Vienna Tourist Board encourages professionalism and skill development among the workforce in the Vienna tourism sector and beyond. Through its Vienna Experts Club, it provides free education and training to staff from 900 hotels, conference venues and incoming travel agencies, to improve their knowledge and understanding of Vienna's tourism offering, and enhance their hospitality and customer care standards.

Partnerships to address labour market challenges – Thompson Okanagan, Canada

Thompson Okanagan Tourism Association (TOTA) and go2HR, BC's tourism human resource association, have formed a partnership to help tourism operators and stakeholders in the regionalization of key recruitment, retention and training initiatives outlined in the BC Tourism Labour Market Strategy and the Thompson Okanagan Regional Tourism Strategy, Embracing Our Potential'. This partnership also enables go2HR to increase assistance and guidance to tourism employers in the region. TOTA has set up a Human Resources Program to support the implementation of the Tourism Strategy. On the its website, TOTA signposts a list of tools and resources on the go2HR website to help tourism businesses recruit, retain and train employees.

14 Enabling DMO functions

Enabling functions refer to activities that support the effective delivery of the core functions outlined above. While not impacting directly on tourism, they do provide the foundations that enable DMOs to operate effectively – partnership development/ management and communications; advocacy and corporate/industry communication; use of digital systems and applications; and finance and administration.

Partnership development and management

Potential partners

The DMO will need to establish and maintain an operational relationship with tourism stakeholders whose businesses deal directly with visitors. The primary purpose will be to engage these stakeholders in the destination marketing and visitor services activities, perhaps through a commercial membership programme. The types of benefits that a DMO can offer to members are detailed in **Error! Reference source not found.**. It is important that regional and local DMOs work together to coordinate communications with potential partners, presenting an integrated programme of activities.

The DMO will also need to develop and maintain relationships with major national or international organisations, such as airlines (e.g. Tarom), train operating companies, tour operators, credit card companies, online travel agencies (OTAs), mobile network operators, that are potential marketing partners (in joint campaigns) or sponsors for events or campaigns.

It is important also for DMOs to engage in 'horizontal' **partnerships between destinations** that are adjoining and/or have complementary product offerings and/or have transportation links. They can work together to create packages of attractions and experiences that are of sufficient scale ('critical mass') and quality to have a real impact on target markets, and to promote broader geographical regions that have similar target markets under a regional brand or through cooperative marketing.

The DMO potentially has a partnership management role to play at a more strategic level; specifically the DM Partnership established to prepare the destination strategy and action plan, and then to establish the DMO. It is important to ensure that the partners remain fully engaged, meeting regularly to coordinate implementation of the action plan; including an annual meeting, to review progress. Of course, many of these stakeholders will meet at the DMO Board meetings, but implementing the strategy and action plan is a broader agenda and there are more stakeholders involved.

Box 14.1. Membership Benefits for DMO Members

Benefits for selling products and services directly between consumers

- Access to online and print marketing channels (website, app, publications, brochure visitor maps, newsletters, and press releases)
- Use of DMO Member logos, branding and straplines within brand guidelines
- Use of a library of images and videos taken by professional photographers
- Access to exclusive members' area to place special offers, sell late availability and join promotional opportunities

Benefits in terms of sales between businesses

- Business to Business promotion and referrals (e.g. to meeting planners and tour operators), member events - business social and networking opportunities
- Advertisements on supplier lists located on DMO corporate websites
- Opportunities to exhibit and participate in sales missions, trade shows, press visits, and presentations

Internal business benefits

- Access to business development advice, training, workshops and other opportunities
- Access to research, statistics and reports to understand the market and shape strategies (e.g. by monthly e-bulletins)
- Industry Representation - Representing member views to municipalities, regional/national tourism bodies

Discounts and savings on key services that underpin business – e.g. credit card commissions, accountancy, banking, insurance, building supplies, energy suppliers, print and hospitality products such as hotels in other destinations

Source: The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming)

Partner communications[13]

For the DMO to act as the hub of the destination community and fulfil its roles effectively, it must maintain an excellent system of communications with its stakeholders, including tourism suppliers within the destination. Potential methods of communication include:

- Regular e-newsletters featuring information on DMO activities, destination news + articles submitted by stakeholders (including DMO Board members or senior managers) relating to destination planning, development, management and/or marketing
- Online fora to discussions and cooperative activity relating to subjects of particular interest
- Stakeholder gatherings two or three times a year. These work well if they are held at existing or new attractions in the destination and include some hospitality or familiarisation tours - good

[13] The following draws on concepts and content prepared originally for The World Bank Group's Operational Handbook on Tourism Destination Management (forthcoming)

publicity for the attraction concerned. People like to hear stories of success, so it is a good idea to invite innovative businesses (perhaps from other destinations) to come and tell their story.

- Training sessions, seminars or online webinars on subjects of interest[14]
- 'Learning journeys' to successful destinations nearby or further afield, which can provide invaluable insights and inspiration for future activities.

Key objectives for such events and activities are to:

- Provide partners with research and intelligence relating to markets, marketing opportunities and news about the destination
- Engage them in joint/cooperative marketing, and information activities
- Stimulate improvement or development of products/experiences to attract target markets
- Enhance the quality of welcome, service and professionalism of all those involved in providing services to visitors
- Consultation on policy issues[15]
- Remind DMO members about the opportunities and benefits of membership and learn how DMO services can be improved – thereby maximising member retention and word-of-mouth promotion of DMO services to potential members (who can be invited to attend one or two member events each year).

Advocacy and corporate/industry communication

Destination managers should be a focal point and strong advocate for the tourism sector, particularly in representations to government at all levels, as many policies can affect the tourism industry, directly or indirectly[16]. Good communication is required with stakeholders and key players in government and those who influence them. Many DMOs form advocacy groups to keep track of legislative issues, build relationships with governments and stay abreast of legal changes which might impact the travel industry.

In addition to their media marketing partners, most DMOs engage with local news media to report on tourism performance and activities to develop and promote tourism.

Support may need to be generated for investment in tourism projects by local government, development agencies, private investors or developers, transport operators, utility suppliers and others. These are investments typically beyond the direct scope and control of DMOs, so evidence-based advocacy is key, by campaigning through news media and/or systematically targeting key players or influencers.

[14] Such as the use of social media, analytics, attracting particular market segments, online security, and energy conservation

[15] E.g. relating to transportation services, visitor management, visa and entry procedures, heritage management, and environmental protection.

[16] E.g. official policies for tourism development, legislation, regulations, taxation, education and workforce development, business formation, Visa policy, zoning and transportation.

Use of digital systems and applications

Where financial and human resources are limited, as is often the case in Romania, it is all the more important that DMOs operate efficiently and effectively. The best way to do this is by making the most of relevant digital systems and applications, to support every aspect of DMO operations, including all aspects of e-marketing (including social media management), managing relationships with marketing intermediaries and the different sectors of the destination community, content management, online research, project management (particularly for action plan implementation), internal/external communications, virtual meetings and internal business processes (including document storage/ management).

It is challenging for any small to medium size DMO to set up, maintain and manage such systems and applications on its own, requiring staff trained for the purpose. Such applications can be developed in partnership with other DMOs and/or the support of the national tourism organisation. If NTAs or NTOs are using common systems and applications as regional and local DMOs, this not only enables economies of scale, but also it facilitates instant exchange of data and content. In this way, a 'light' model could emerge for DMOs operating within a national or regional network. This is particularly relevant to Romania's new DMOs, but it could also apply in more mature destinations as well.

Some of the most important digital applications are those used for destination marketing, because of their primary importance to the private sector in tourism.

Finance and Administration

Every DMO has requirements for central **financial and administrative support services**. Staffing required for these functions should be limited; in smaller DMOs, functional responsibility may rest with the chief officer, with delivery of services outsourced to volunteers or stakeholder organisations.

Annex A: Roadmap for the operationalisation of Tourism DMOs in Romania

The size of Romania as a country and the scale of its tourism potential is such that it requires a two-tier tourism destination management structure (local and 'regional') below the national level – one that is fully integrated, both vertically and horizontally, with clearly identified roles and responsibilities at each level.

Under the current legal framework in Romania, it is not possible for the Ministry of Economy, Energy and Business Environment to establish a DMO network with a specified number of structures implemented on a phased basis. However, subject to the introduction of new enabling legislation, it is proposed that eight Regional DMOs should be established, with a target of two each year for four years. It is also envisaged that a network of local DMOs would need to be established by agreement (potentially up to four in each region). Financial support with clear criteria would facilitate such agreement. More detailed analysis (taking account of the criteria set out at the end of this paper) will be required to determine how many DMOs are appropriate at each level.

Roadmap implementation

The best and most realistic approach to establish a fully functioning DMO network throughout the country would be to develop a pilot project, working in the two regions (NUTS II) with the highest proportion of "top ten" counties for international arrivals – the North West and Central.

We suggest that, as the first step, the Ministry of Economy, Energy and Business Environment should work with North West and Central RDAs together and with key destination players within those regions, in order to:

- Shape the potential map of Regional and Local DMOs for those regions, including possible cross-regional DMOs;
- Initiate establishment of two pilot Regional DMOs (guided by the DMO Operating Manual);
- Once the pilot Regional DMOs are established, they should work with the RDAs to:
  - Prepare or commission a new or updated tourism strategy and action plan
  - Support the creation of new Local DMOs or (more likely) adapting/ strengthening existing DMO-like structures, as required.

Step 1. Setting up Regional DMOs

Regional DMOs should be designed to form an effective network that can work with the national tourism authority in a strong and dynamic partnership, to deliver aligned national and regional strategies and brands, with a particular focus on the development of international target markets.

- he target should be to establish up to eight regional DMOs. They should be: i) limited in number, each having the 'critical mass' to be effective; ii) have a minimum core budget of EUR 250 000[17] and a target to raise at least an equivalent amount; iii) be guided by an evidence-based regional tourism strategy; iv) the new regional DMO structure should specifically engage public, private and other sectors as active and equal partners in implementation. The DMOs should operate on a fully professional basis, within an innovative, entrepreneurial culture. Objectives should be consistent across Romania, and not linked to political change.

To this end, the following actions are recommended:

- "The Ministry of Economy, Energy and Business Environment, the RDAs, and all relevant stakeholders, including the existing associative partnerships, should work together to prepare a map of the optimum destination areas for 'regional' DMOs". Depending on circumstances, the DMOs could operate across the whole of an RDA region, for one or more counties within an RDA area, or for a group of counties across RDA boundaries.
- Building on existing effective DMO structures where they exist, will be essential. This should involve the active participation of the private sector, existing tourism associations, cultural tourism operators, as well as those responsible for managing protected areas of natural and cultural heritage. Further consideration should be given to decision-making and to the voting system in the existing law that is in force. This is important in order to create a meaningful equal voice across all members of a DMO and to ensure that potentially frustrating blockages to decision-making are removed. These measures are essential if the targets for tourism growth in Romania are to be achieved.
- RDAs, individually or jointly, should act as a 'parent body' for each of these DMOs by commissioning a tourism strategy and action plan as a framework for the programmes of the DMO and its stakeholders, helping them to create genuine partnerships, assisting in the preparation of thorough business plans within the context of a national and regional strategies. RDAs should play a key role in assisting regional DMOs to get established and to identify potential EU and other funding sources where appropriate (e.g. local and national government). It is recommended that RDAs have a seat on Boards, but not engage in the day-to-day management.
- The Ministry would provide central support in the form of business planning and financial systems, coordination of DMO and national policy activities, IT systems and applications, training for DMO staff, research and intelligence, strategic framework, etc. Where appropriate they would deliver these services in conjunction with or through the RDAs.
- In addition to this support for DM at the regional and local level, the Ministry would undertake its ongoing destination management activity at the national level – notably its own programmes of strategy, research and intelligence, marketing, content creation and management, support for product and experience development schemes, national events development; and the coordination of the tourism related activities of other Ministries, agencies, utility suppliers, tour and transport operators, etc.

[17] This assumes core staffing of 10 professionals – Chief Officer, Marketing (3), Visitor Services (1), Strategic Planning (1), Research & Development (1), Partnership Development/ Communications (1) and Finance & Administration (2) – and (say) 5 support staff; and also the full range of office costs, ICT, training, travel + core programmes for research and planning and content management.

Step 2. Establishing Local DMOs[18]

Each Local DMO should focus on bringing the key players together in a strong local **destination management partnership,** with the primary objectives of ensuring that Romania's cities, towns, villages and countryside are attractive, authentic, well maintained places for visitors to spend time and money, and provide authentic new visitor experiences, based on local stories. Other objectives include providing business support, stimulating training to increase industry professionalism, and creating local packages of activities and the opportunities for cross selling; and to work with regional and national organisations in marketing and sales, supporting national thematic campaigns and adding local dimensions.

To this end, the following actions are recommended:

- The Regional DMOs will work with municipalities, individually or jointly, to establish Local DMOs, after mapping all the tourism interest groups and stakeholders in the destination.
- Thereafter the Regional DMOs will provide ongoing guidance and support for the local DMOs by i) providing a strategic framework for their own activities; ii) coordinating the activities of the Local DMOs within the regional framework; iii) guiding and assisting in each of the above activities, and; iv) engaging RDA assistance in start-up business support and industry training.

Minimum criteria necessary for accreditation of a DMO by the Ministry of Economy, Energy and Business Environment and Checklist for DMOs to be eligible for government funding support (years 1-4)

As outlined in recommendation 6 of the diagnostic component, and subject to the introduction of a supporting legal framework, the Ministry should give consideration to providing government funding to support selected regional DMOs as they seek to establish or expand their operations, and in order to support the development of a sustainable network of DMOs in Romania. In such a case it will be important to have clear criteria to identify and justify the selection of those eligible DMOs best placed to receive funding support during the pilot phase, and remainder of the programme (if continued).

Eligibility criteria might include the following:

New Regional DMOs

- Covering one or more counties, with a minimum accommodation capacity of, for example, 20 000 rooms.
- Effective leadership and a regional tourism partnership of key stakeholders in place and committed to establish and operate DMO on a continuing basis
- Tourism strategy and action plan for the DMO area, within the framework of the national strategy, in existence or planned within one year
- Business Plan prepared, demonstrating critical mass and viability and intended role in delivering regional strategy and action plan for the DMO area; including target budget of EUR 500 000, half from primary sources (Tourism Promotion Tax) as well as contributions from Municipal and County Councils and/or other sources.
- Well-founded plan to raise additional funding from marketing partners, donor funding, sponsorship, sales of services, membership, etc.

[18] These should cover one or more municipal areas, with a minimum of 2500 rooms available in commercial visitor accommodation; or the potential to reach this level within five years.

- Commitment to i) work with municipalities and other local stakeholders to establish Local DMOs, including guidance and support in the preparation of a local tourism strategy and action plan; ii) operate within a national network of RDMOs across the country, and; iii) work with national organisations in marketing and sales, supporting national thematic campaigns and adding local dimensions.

New Local DMOs

- Effective leadership and a partnership of key local stakeholders in place and committed to establish and operate DMO on a continuing basis
- Tourism strategy and action plan for the local area, within the framework of the regional strategy, in existence or planned within one year
- Business Plan prepared, demonstrating viability and intended role in delivering local and regional strategies and action plans; including target budget of EUR 100 000
- Commitment to work with regional DMO and other Local DMOs within region, forming a mutually supportive regional network
- Business Plan to include active involvement in product and experience development and raising levels of quality and professionalism
- Commitment to work with regional and national organisations in marketing and sales, supporting national thematic campaigns and adding local dimensions.

Long-term funding of DMO network (years 5-10)

One potential option to support the operationalisation and sustainability of a two-tier DMO network in Romania following the initial four year programme, would be to revisit how revenue from the Tourism Promotion Tax is collected and redistributed. If undertaken at the county level or centrally, it would be possible to distribute funds to support the operation of both regional and local DMOs. For example:

- Regional DMOs could receive 50% of tax revenue to support their full range of activities
- Local DMOs could receive 30% of tax revenue
- The remainder (20%) could be used to establish a National Tourism Development Fund, to support innovative tourism projects – this fund to be managed by a committee of key players from the national public and private sectors.

Annex B: DMO functions - Reference documents

The section below lists reference documents (such as handbooks, manuals and guidelines), providing good, practical advice on the following seven key DMO functions: Research & intelligence; Strategic planning for destination; Destination marketing & sales; Visitor services; Destination & product development; Events development; and Skills development.

Reference documents for specific DMO function areas

DMO Function Areas	Reference Documents
Research & intelligence	Online survey systems Cvent online survey software Survey Monkey Qualtrics Visitor surveys Methodological manual on the design and implementation of surveys on inbound tourism, Eurostat (2000) Web analytics Handbook on key performance indicators for tourism marketing evaluation, ETC/UNWTO (2017) – Section 5.3 Web analytics Destination WebWatch Google Analytics 101 for Destination Marketing: A hands-on guide for digital marketers, CrowdRiff Guide to Tourism Destination Marketing Strategy for DMOs (page 22 – Audit your existing DMO website), Orioly Google Trends Google Analytics Google Search Console Google PageSpeed Insights Google Structured Data Testing Tool Serpstat – Search engine optimisation (SEO) platform Ahrefs – Web search traffic SERP Simulator - Search engine results pages, SEO Web Page Word Counter Return on Investment (ROI) analysis How to Measure ROI in Travel & Tourism Digital Marketing, MyTravelResearch.com Oxford Economics Market Studies – strategic evaluation of market opportunities and risks for destinations and source markets Performance measurement system/ dashboard Basic Frameworks for Your Destination Dashboards, Simpleview blog (June 2018) A Manual for Evaluating the Quality Performance of Tourist Destinations and Services, Enterprise DG Publication (Jan 2014)) Tourism businesses intelligence gathering Handbook on key performance indicators for tourism marketing evaluation, ETC/UNWTO (2017) Amadeus services for Destinations & DMOs Market demand projections

	Oxford Economics Market Studies – strategic evaluation of market opportunities and risks for destinations and source markets Tourism Research Australia Big data analysis/ presentation DESTINATION NEXT Practice Handbook – Mining Big Data (p32-33), Destinations International Defining the future of travel through intelligence – Smart decisions for smart destinations using big data, Amadeus
Strategic planning for destination	Principles for Developing Destination Management Plans, VisitEngland (2012) The Guide to Best Practice Destination Management – Tourism 2020 Project, Australian Regional Tourism Network 'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions, UNWTO (Sep 2018) Coping with success: Managing overcrowding in tourism destinations, WTTC/McKinsey & Company (2017)
Destination marketing & sales	Handbook on Tourism Destination Branding, ETC/UNWTO (Aug 2009) Handbook on Tourism Market Segmentation, ETC/UNWTO (Sep 2007) Handbook on E-Marketing for Tourism Destinations, ETC/UNWTO (Mar 2014) Handbook on Marketing Transnational Tourism Themes and Routes, ETC/UNWTO (Dec 2017) Handbook on Key Performance Indicators for Tourism Marketing Evaluation, ETC/UNWTO (May 2017) The Voice of Travelers – Leveraging User-Generated Content for Tourism Development, The World Bank Group & TripAdvisor (2018) The Handbook of Managing and Marketing Tourism Experiences, Emeraldinsight (Dec 2016) How DMOs can make their web-based marketing a success, Trekksoft (Aug 2016) Guide to Tourism Destination Marketing Strategy for DMOs, Orioly Marketing Strategies for Tourism Destinations: Executive Summary, ETC (Feb 2015): - The Russian Federation (Dec 2014) - Canada (Nov 2014) - USA (Oct 2014) - Japan (Oct 2014) - Brazil (Aug 2014) - China (Jul 2014) 12 stages of Transformation for DMOs, Think Travel (Jan 2019) Keep It Real for Destinations – A guide to incorporating Wise Growth in your communications with visitors, residents and businesses, VisitEngland/Leeds Met University (2014)
Visitor services	Advice Document – Welcoming Coaches and Groups, VisitEngland/Coach Tourism Council (2014).
Destination & product development	City Centre Management and the Visitor Economy, VisitEngland Guidelines for the Development of Gastronomy Tourism, UNWTO (May 2019) Manual on Accessible Tourism for All: Principles, Tools and Best Practices – Module 1: Accessible Tourism – Definition and Context, UNWTO (2016) Handbook on Tourism Product Development, ETC/UNWTO (Oct 2011) Destination for All - A guide to creating accessible destinations, VisitEngland
Events development	Maximising the Benefits of Mega Events for Tourism Development, UNWTO (Aug 2017)
Skills development	Interview Reports on the Future of Digital, Green and Social Skills in Tourism, Next Tourism Generation Skills Alliance (2019) Mapping skills and training needs to improve accessibility in tourism services, European Commission, DG Enterprise and Industry (2014) Policy Approaches to Skills Development in Tourism, OECD (2012) Educating the Educators in Tourism, UNWTO (1996)
Crisis management	Toolbox for Crisis Communications in Tourism: Checklist and Best Practices, UNWTO (2011) Handbook on Natural Disaster Reduction in Tourist Areas, UNWTO (1998)

General reference documents across all DMO function areas

- A Practical Guide to Destination Management, UNWTO (2007)
- Destination management in developing and emerging countries: handbook and guidelines for building sustainable destination management organizations, GIZ (2019)
- Destination 2030: Global Cities' Readiness for Tourism Growth, WTTC (June 2019)
- UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs) – Preparing DMOs for new challenges, UNWTO (May 2019)
- Tourism Destination Management – Achieving Sustainable and Competitive Results, USAID (2018)
- Tourism and the Sustainable Development Goals – Journey to 2030, UNWTO (Jan 2018)
- Practical Guidelines for Integrated Quality Management in Tourism Destinations – Concepts, Implementation and Tools for Destination Management Organizations, UNWTO (Feb 2017)
- Destination NEXT Practice Handbook, Destinations International (2015)
- The Handbook of Managing and Marketing Tourism Experiences, Emeraldinsight (Dec 2016)
- Best Environmental Management Practice in the Tourism Sector – Learning from frontrunners, European Commission – JRC Scientific and Policy Reports (2013)

Annex C: Tourism Destination Strategy Examples

- Advancing Tourism 2016-2020 – Growing Queensland Jobs (Australia) at https://publications.qld.gov.au/dataset/advancing-tourism/resource/df997cf7-14fc-47b1-ac99-ddc7f0975967
- Akwesasne Tourism Strategic Action Plan (Sovereign tribal nation, USA and Canada) https://www.srmt-nsn.gov/_uploads/site_files/ATSAP_FINAL_082616.pdf
- Edinburgh 2020 – The Edinburgh Tourism Strategy (Scotland) at https://www.etag.org.uk/wp-content/uploads/2014/05/EDINBURGH-2020-The-Edinburgh-Tourism-Strategy-PDF.pdf
- Derry City & Strabane District Tourism Strategy 2018~2025 (Northern Ireland) at https://www.derrystrabane.com/getmedia/4d4c8908-02ca-4e43-a8a1-c679358f3356/DCSDC_Tourism_Strategy_2018_LowRes.pdf
- Glasgow City Region Tourism Strategy (Scotland) at http://www.glasgowcityregion.co.uk/article/9740/The-Glasgow-City-Region-tourism-strategy-launched, http://www.glasgowcityregion.co.uk/CHttpHandler.ashx?id=22898&p=0, Glasgow City Region Tourism Strategy Action Plan (2018-2021) at http://www.glasgowcityregion.co.uk/CHttpHandler.ashx?id=22899&p=0
- Harlan County Economic Development Plan (Kentucky USA) at https://www.naco.org/sites/default/files/documents/Transforming%20the%20Harlan%20County%20Ky%20Economy.pdf
- Helsinki City Strategy 2017-2021 – The Most Functional City in the World (Finland) at https://www.hel.fi/static/helsinki/kaupunkistrategia/strategia-en-2017-2021.pdf, https://www.hel.fi/helsinki/en/administration/strategy/strategy/city-strategy/, https://www.hel.fi/static/kanslia/elo/roadmap-for-tourism.pdf
- Margaret River Tourism Strategy & Planning documents (Western Australia) at https://corporate.margaretriver.com/resources/ymrr-strategy-and-planning/
- Newry Mourne & Down Tourism Strategy 2017-2021 (Ireland) at http://www.newrymournedown.org/media/uploads/nmd_tourism_strategy_20172022.pdf
- Sibiu County Tourism Association Action Plan (Romania) at https://www.interregeurope.eu/fileadmin/user_upload/tx_tevprojects/library/file_1530530922.pdf
- Thompson Okanagan 10-year Regional Tourism Strategy (Canada) at https://totabc.org/resources/regional-strategy/

Annex D: Example Operational Structures

Regional DMOs

Thompson Okanagan Tourism Association (Canada)

The role of the Thompson Okanagan Tourism Association (TOTA) as a regional DMO has been significant in the development of the region's tourism industry. TOTA operates with a core team of 18, supported by contract and grant employees. The core staff comprises:

Job Title	Responsibilities
Executive	
President and Chief Executive Officer	• Sets strategic direction of the Association in accordance with the Board's vision, mission and priorities; • Builds a culture that reflects the Association's values; • Oversees the operation of the Association and provides leadership in accordance with board parameters, financial, legal and regulatory requirements; • Ensures the Association and its programs, products and services are consistently presented in a strong, positive light to stakeholders.
Senior Executive Assistant & Board Liaison	• Provides confidential administrative and project support to the CEO and the Board of Directors.
Corporate Services Department	
Corporate & Finance Officer	• Responsible for the integrity of the Association's financials, producing timely and accurate financial statements, forecasts, analysis and corporate reporting; • Manages the Corporate Services functions including IT, Performance Measurement, HR and Purchasing.
Office Manager	• Responsible for maintaining accounts receivable and payable functions, as well as assisting the Corporate & Finance Officer. • Develops and implements a plan to measure TOTA's performance • Prepares information to meet TOTA's and Destination BC's reporting requirements • Increases the efficiency of TOTA's administrative processes and maximises the effectiveness of TOTA's database systems
Destination & Industry Development	
Vice President, Destination & Industry Development	• Second to the CEO, committed to enhancing product assets through proactive and ongoing engagement with industry, creation of plans and strategies, collaborative implementation of plans with TOTA stakeholders and providing the benefits of a close relationship with Destination BC to communities, tourism businesses and other industry stakeholders in the province.
Industry Communications Specialist (contractor)	• Responsible for TOTA's industry communications.
Destination Development Program Specialist	• Assists and/or coordinates community tourism organisation and businesses to access a broad range of resources, tactical opportunities, funding and expertise in core program areas. • Program lead in the advancement of TOTA's rail trails tourism strategy.
Indigenous Tourism Specialist	• Responsible for developing a cultural tourism strategy;
Regional Accessibility Specialist	• Creating relationships with tourism partners and stakeholders in the region • Site reviews and recommendations on universal accessibility and design • Universal design and accessibility presentations • Researching accessible tourism and travel best practices, existing accessible tourism services, products and experiences in the region • Highlighting accessible experiences on thompsonokanagan.com

	• Promoting support agencies for people with different abilities • Enhancing the lives of people with disabilities through awareness and knowledge
Global & Regional Marketing	
Director of Marketing	• Information not available
Digital Marketing Specialist	• Information not available
Visitor Centre Manager	• Manages Route 97 Visitor Inspiration Centre.
Travel Trade Media Support (contractor)	• Provides support to the Travel Trade & Media Specialists and sales
Marketing Communications Coordinator	• Responsible for TOTA's marketing communications.
Symphony Tourism Services, a subsidiary of the Thompson Okanagan Tourism Association.	
Managing Director	• Responsible for leading Symphony Tourism Services
Travel Trade, Media & Digital Marketing Support	• Provides support for Travel Trade, Travel Media and Digital Marketing.
Regional Marketing & Research Specialist	• Data analysis and research report generation for market analysis and custom reports to support visitor profiles for the industry.

Sources: https://totabc.org/about-us/who-we-are/staff/ and https://totabc.org/programs/accessibility/

Local DMOs

Sibiu County Tourism Association (Romania)

Sibiu County Tourism Association works on the basis of an annual action plan, developed in collaboration with its members, and the activities carried out and their results are the subject of an annual activity report. The action plan is delivered by the Association's five staff, comprising:

Job Title	Responsibilities
Executive Director	• Strategic and operational planning of the association, policy development and strategic planning for the sustainable management of Sibiu region tourist destination
Product Manager	• Development and management of tourism products (such as Sibiu local breakfast) • Social media
Sport Events Coordinator	• Manages the sports agenda financed by the County Council
Technical Expert	• For major events (such as Sibiu cycling tour)
Administrative post	• Administrative support

Visit Cork (Ireland)

Visit Cork employs five core staff (supported by administration staff/interns) under the following roles:

Job Title	Responsibilities
Head of Visit Cork	• Oversees the DMOs activities promoting leisure (Pure Cork) and business tourism (Cork Convention Bureau) for Cork.
Cork Convention Bureau Manager	• Business development
Coordinator	• Information not available
Tourism Destination Manager	• Programme management - develop programmes which deliver on the proposition and fulfil the key KPIs; • Leading on the successful implementation of the Tourism Strategy; • Creation of integrated visitor-centric experience programmes that make the proposition real for the visitor and support sales and revenue targets; • Building industry and stakeholder wide engagement and collaboration.
Tourism Marketing Manager	• Marketing the destination as one proposition, as defined by the brand and supported by relevant and targeted programmes. • Creation of effective and tailored consumer and trade sales and marketing programmes which deliver the defined sales and revenue KPIs, working closely with relevant state agencies, industry and key local stakeholders.

Sources: Growing tourism in Cork a collective strategy, personal communication.

References

[1] Romania National Tourism Plan 2007-2028 (p1)

[2] World Economic Forum (2016), What is Competitiveness? https://www.weforum.org/agenda/2016/09/what-is-competitiveness/ (accessed on 12/09/2019)

[3] World Economic Forum Report 2007.

[4] The Impact of Legislation on the Romanian Tourism Sector, Muresan L & Nistoreanu P, Bucharest University of Economic Studies (May 2017)

[5] OECD Tourism Trends and Policies 2018 (p361)

[6] *The Experience Economy* Pine & Gilmore, 1998