

Globalization with its associated tendencies towards integration of services and concentration of capital has put pressure on tourism destinations to better position their tourist offers in a highly competitive market. Hence, Destination Management Organizations (DMOs) should constantly re-engineer and adapt their product diversification and commercialization strategy to the changing patterns of "post-modern" tourists' demand. At the same time, tourism development pressures destination areas through increased resource consumption, waste generation and land fragmentation while policy measures to promote more sustainable tourism are progressing only slowly due to local resistance. Therefore, finding the right balance between economic development of tourism destinations, conservation of their resources and well-being of the local population has become a challenging task for many Destination Management Organizations. The aim of this book is to present the results of exploratory research done in 2011 in six Alpine countries (i.e. CH, A, D, I, F, SLO) and in Poland, to evaluate and compare the efforts of 72 DMOs concerning sustainable management of a tourism destination.



Katarzyna Klimek

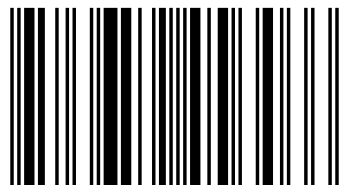


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# Destination Management and Sustainable Tourism Development

A Cross-Country Analysis



978-3-659-45646-6



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**LAP LAMBERT Academic Publishing**

## **Impressum / Imprint**

Bibliografische Information der Deutschen Nationalbibliothek: Die Deutsche Nationalbibliothek verzeichnet diese Publikation in der Deutschen Nationalbibliografie; detaillierte bibliografische Daten sind im Internet über <http://dnb.d-nb.de> abrufbar.

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Bibliographic information published by the Deutsche Nationalbibliothek: The Deutsche Nationalbibliothek lists this publication in the Deutsche Nationalbibliografie; detailed bibliographic data are available in the Internet at <http://dnb.d-nb.de>.

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OmniScriptum GmbH & Co. KG

Heinrich-Böcking-Str. 6-8, 66121 Saarbrücken, Deutschland / Germany

Email: [info@lap-publishing.com](mailto:info@lap-publishing.com)

Herstellung: siehe letzte Seite /

Printed at: see last page

**ISBN: 978-3-659-45646-6**

Zugl. / Approved by: Sierre, University of Applied Sciences, Post-doctoral disertation, 2012.

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## Acknowledgements

This research was accomplished thanks to the support of the Scientific Exchange Program Sciex-NMS<sup>ch</sup> 2010-2011. The author wishes to express her deepest gratitude to her host and home mentors: Prof. Roland Schegg from Institute of Tourism, HES-SO Valais and Prof. Jadwiga Berbeka from Cracow University of Economics for their support and valuable remarks. Roland, thank you for giving me an opportunity to realize my post-doc research project in Switzerland.

Sincere gratitude is also due to prof. Miriam Scaglione from HES-SO Valais for her conceptual contribution in lexical analysis of destination websites.

The author would also like to convey thanks to BAK Basel Economics AG for their collaboration in yielding the list of the 150 destinations of the BAK TOPINDEX for this study.

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## Introduction

Globalization has changed the tourism industry forever. The introduction of open market economies in many countries and free human movement created the opportunity of very intensive and rapid tourism development worldwide (UNWTO, 2010). Global trends in tourism such as integration of services or concentration of capital have put pressure on tourism destinations to better position their products in a highly competitive market.

In response to this development and to strengthen the competitiveness of the tourism industry, experts from Switzerland and other countries developed in the mid-90s the concept of destination marketing organization (DMO) as strategic management units of traditional tourism destinations.

Nowadays, integrated destination management based on public-private partnership has become a subject of growing importance, as most European tourism destinations are in the mature phase of their development. Moreover, competition between “old” and emerging tourist destinations are significantly increasing.

The main objective of this report is to analyze the importance of Destination Management Organizations (DMOs) for the development and performance of tourism destinations and to assess their role in the set up and implementation of sustainable development.

Theoretical approaches regarding basic topics such as destination, destination management and sustainable development are presented in Chapter 1.

Chapter 2 focus on the research methodology which is based mostly on quantitative research (using approaches such as web-mining, questionnaire surveys) conducted

in six countries situated in the Alpine Arc (Switzerland, Germany, Austria, France, Italy, Slovenia) and in Poland.

The empirical results of the cross-countries study are presented in Chapter 3.

Considering Switzerland as a solid benchmark in integrated management, this research tried, as the first step, to analyze whether destination development is associated with the management model of a DMO with the implementation of a sustainable development strategy, respectively. Afterwards data from Swiss DMOs was compared with data from DMOs across the Alpine Arc (i.e. Austria, France, Italy, Germany and Slovenia). The aim was to characterize the DMO model(s) and to detect the similarities and differences in the application of sustainable development principles. This comparison was crucial to evaluate the possibilities of implementation of the DMO concept in other countries where this concept is hardly known (e.g. in Poland).

Conclusions, limits of this study and future research are summarized in Chapter 4.

The book's appeal should be to those interested in integrated destination management: practitioners, tourism researchers and students.

## **I. Theoretical approach.**

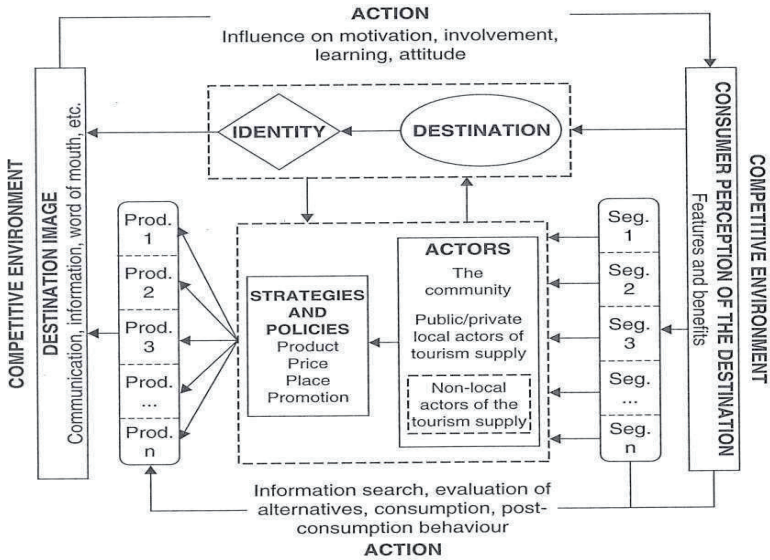
### **Defining destination, Destination Management Organization concept, stakeholder groups and sustainable development of tourism destination.**

#### **1.1. The importance of the destination as a study unit**

When approaching the topic of destination management, firstly it is necessary to define the concept of the destination. Traditionally, destination is regarded as a geographical area, territorial administrative unit such as a country, region, island or town (Davidson & Maitland, 1997; Hall, 2008).

For economic and marketing sciences, a tourist destination is more than a geographical place. It is an amalgamation of direct and indirect tourism amenities (e.g. accommodation, catering, public & private transport and roads, visitor information, recreation facilities, etc.) and a wide range of natural and cultural tourist attractions (e.g. landscape, monuments, atmosphere) offered to a tourist during his/her stay in a chosen place (Bieger, 1997; Buhalis, 2000; Leiper 1995, 2004; UNWTO 2007). Often the destination boundaries are artificially defined due to geographical or political barriers. An example of this is the Alps which are comprised of the political borders of Switzerland, Austria, France, Italy and Slovenia. However, they are often portrayed by tourists as part of the same tourist package (i.e. “ski holidays in the Alps”). Consequently, tourists perceive a destination as a whole, which is why this area is often not only a “tourist place” but becomes a “tourist product”. Hence, a tourist destination can be defined as “a collection of experiences gained by travelers” and should be perceived as a system of products and services (see Figure 1.) which suppliers are ready to deliver and tourists are willing to consume (Gunn, 1972; Keller, 2000).

**Figure 1. Destination as a system**



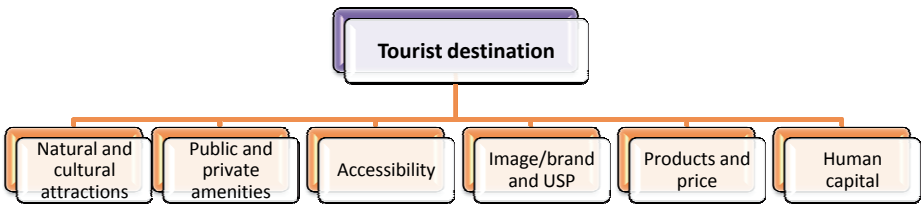
Source: Buhalis, Costa (ed.) (2006).

Purchasing and collecting experiences have become one of the most important sources of motivation for contemporary tourists (Mac Cannel 1999, Ritchie, 2003). For this reason every destination has to differentiate its own tourist offer in such a way so as to provide unique character and personality through a USP (unique selling proposition) and branding. Another important element for the competitiveness of a destination is the pricing aspect. Price factor plays a very important role in attracting tourists to or discouraging them from the destination. Even if many travelers are currently more inclined to pay for luxury travel, they are almost always searching for “the best deal” (Gretzel, Fesenmaier, & O’Leary, 2006).

One more important aspect which influences destination image is the “human” factor. Competences of the tourism work-force, as well as involvement of the local population in and attitude toward tourism development can strongly affect the image and brand of the tourist destination.

The basic elements of a tourism destination mentioned above are summarized in Figure 2.

**Figure 2. Essential components of a tourist destination**



Source: Own elaboration based on: Cho, B.H. (2000).

Bieger (1998) and other Swiss experts enumerated criteria for a tourism destination. In order for a region or area to become a tourist destination, it has to:

- build up basic tourist facilities (accommodation & food, transportation, entertainment),
- be able to create new brands (supraregional) via qualified personnel,
- create distribution, reservation and sales system appropriate for tourists needs,
- create tourist product via service chain,
- include at least one independent brand.

A tourist destination can be classified into several categories. The main types of tourist destinations, categories of clients and types of tourist activities are summarized in Table 1.

**Table 1. Basic categories of tourist destinations, typology of clients and their possible activities**

<b>Type of destination</b>	<b>Type of clients/tourists</b>	<b>Possible activities</b>
<b>Urban</b>	Leisure  Business/MICE	City-breaks, sightseeing historic and cultural tourism, entertainment, shopping, religious tourism Business meetings, incentives, conventions (including congress & conference venues), exhibitions
<b>Seaside</b>	Leisure  Business/MICE	Sightseeing, cruising, 3xS (sea, sun, sand), different water sports, spa& wellness Very frequent incentives, congress & conference venues, less frequently exhibitions and fairs
<b>Alpine</b>	Leisure  Business/MICE	Summer and winter sports activities (e.g. hiking holidays, ski holidays), spa& wellness Very frequent incentives and congress & conference venues, less frequently exhibitions and fairs
<b>Rural</b>	Leisure	Relaxation, family holidays, agriculture learning activities

<b>Unique-exotic-exclusive</b>	Leisure  Business/MICE	Special occasion travel (wedding, anniversaries, jubilee) Incentive travels, convention venues and exhibition
<b>Authentic third World</b>	Leisure  Business/MICE	Adventure, education, charities actions, Business opportunities explorations, study-tours, incentive travels

Source: Own elaboration based on: Buhalis, (2000).

### 1.2. DMO: definition and basic functions

Strategic management of a tourist destination is taking ever greater importance in a global, competitive tourism market (Sainaghi, 2006).

Destination Management Organization (DMO) is a concept based on public-private partnership which refers to a coalition of many organizations and interests working together towards mutual goals (UNWTO, 2007). This organization does not control the activities of their partners, but has the leader position in developing and managing partnership through the destination to enhance its long term competitiveness (Pike, 2004).

This model of integrated management was especially developed in Switzerland by Prof. Thomas Bieger and his team from the St-Gallen University in the mid-90s (Bieger, Freyer, 2005). Hence, Switzerland is one of the pioneer countries in the implementation of the DMO concept. Currently, many destinations in the world especially in the mature phase of their development (e.g. in Alpine countries) have introduced this concept into practice.

The acronym of Destination Management Organization –DMO is often used as:

- Destination Marketing Organization (referring to marketing as its main function),
- Destination Marketing and Management Organization, or
- Destination Management Organization (Bornhorst, Ritchie, Sheehan, 2010).

In fact, destination marketing and destination management are two distinctive but interrelated approaches. Destination management is a larger concept which includes marketing, strategic planning and all other organizational functions of DMO (Keller, 2000).

Destination Management Organization often refers to three possible categories and acts on the following levels:

- National Tourism Office/Authorities (NTO, NTA) (responsible for tourism development, marketing and management at a national level)
- Regional/provincial DMO (responsible for tourism development, tourism products elaboration, marketing and management in a geographically defined region)
- Local DMO (responsible for tourism development, marketing and management in smaller geographic areas (e.g. city, town, villages, holiday resorts, etc.) (UNWTO, 2007).

In general, the NTO gives general guidelines to regional and local DMOs and serves them as a “reference point” but the NTO does not create tourist products and in many cases is financed by public funds (e.g. NTO in Poland). As regards to regional and local institutions, DMOs of this kind generally do not constitute a part of public authorities (Beritelli, Reinhold, 2009).



The main differences between NTO and regional/local DMOs concerning tasks performed are presented in Table 2.

**Table 2. Basic functions of national regional & local tourism organizations as regards to strategic management**

NTO main tasks	Regional and Local DMOs tasks
1. Branding and positioning on a national level	1. Branding and positioning on a regional/local level
2. Selection of priority market segments and elaboration and implementation of tourism development strategy	2. Elaboration and implementation of marketing strategy and/or promotional campaign on a regional or local level
3. Implementation of promotional campaign on a national level	3. Development and implementation of tourism policy on local or regional level
4. Transfer of knowledge to regional and local offices	4. Creation of and management of tourism products via supply chain of services (i.e. integrated packages, DMS <sup>1</sup> etc.)
	5. Customer Service (reception, information, animation) and representation of stakeholders interests and cooperation with different groups of interest

Source: Own elaboration based on: Bieger, Beritelli, Leasser, (2009); Beritelli, Reinhold, (2009).

The main role of a DMO consists of fulfilling marketing, promotion and sales tasks, as well as coordinating long-term strategic planning, since the consumer perceives

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<sup>1</sup> Destination management system - Destination Management Systems are IT systems that consolidate and distribute a comprehensive range of tourism products through a variety of channels and platforms, generally catering for a specific region, and supporting the activities of a destination management organization within that region. DMSs attempt to utilize a customer centric approach in order to manage and market the destination as a holistic entity, typically providing strong destination related information, real-time reservations, destination management tools and paying particular attention to supporting small and independent tourism suppliers.

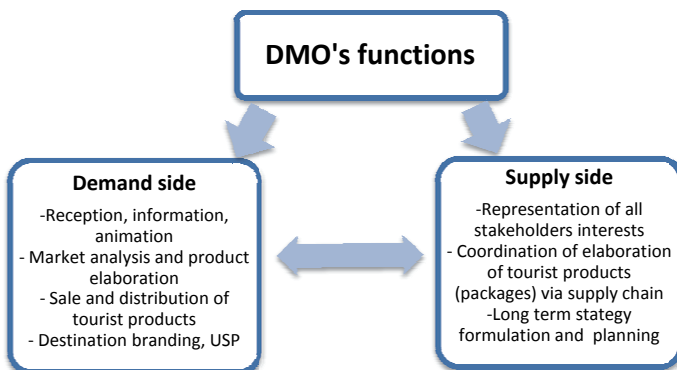
and buys destination as one integrated product (Bieger & Müller, 1998; Bieger, Beritelli & Leasser 2009; Pearce, 1992; van Harssel, 2005). This entity also plays an important role of leadership and advocacy for tourism within the local community. The DMO draws attention to tourism so that residents of the destination understand the significance of the visitor industry (Gartrell, 1994). Therefore, the role of a DMO from the point of view of demand and supply is complex and consists of finding balance and satisfying, at the same time, the needs of visitors and stakeholders as well as ensuring the long term strategy of development (Ritchie, 2003; Bieger, Beritelli & Leasser, 2009).

Wray, et al. (2010) enumerated the most important features of successful and sustainable destination management. Effective DMO should have:

- a long-term vision of destination development
- a clear designation of responsibilities and appropriate operational structures
- transparent and responsible decision-making engaging local groups of interests.

Figure 3 enumerates the main DMO functions on the demand and supply side.

**Figure 3. DMO function from the demand and supply point of view**



Source : Own elaboration based on: *Bieger, Beritelli, Leasser, (2009)*.

In summary, the roles of the DMO, in the broadest sense of terms, are: to work towards enhancing the well-being of destination residents in order to satisfy visitors' needs and to improve destination competitiveness on the global tourism market.

### 1.3. Stakeholders definition and categories

As mentioned above, Destination Management Organization should join the interests of every relevant market player coming from the public and private sector.

According to Freeman and Fridgen (1984), a stakeholder can be defined as “any group or individual who can affect, or is affected by the achievement of a corporation’s purpose”.

Principal stakeholders can be divided into two groups: internal (exercising their activities through the regional area) and external coming from outside the region, as illustrated in Table 3.

**Table 3. Public and private stakeholders who can influence DMO functioning**

	<b>Internal P&amp;P stakeholders</b>	<b>External stakeholders</b>
<b>Public sector</b>	Regional/local government	National government
	Regional/local tourism authorities	National tourism authorities
	Regional/local tourist office	National Tourism Authorities/Organization (NTA, NTO) (e.g. Switzerland Tourism)
	Local Convention Bureau	National Convention Bureau
	Local economic & entrepreneurship development agencies (e.g. chamber of commerce)	National economic & entrepreneurship development agencies
	National Parks authorities	National institution of nature protection
	Academic & Research (R&D agencies)	
	Local NGOs (e.g. ecological	International, national NGOs

	movement)	(e.g. WWF etc.)
<b>Mix</b>	Local attractions providers, events and cultural organization	
	Local media	International, national media
	P&P local investors	P&P external investors
	Local business support agencies (e.g. business hub)	National business support agencies
	Local tourism consortia & partnership	Interregional consortia
<b>Private sector</b>	Accommodation providers	National accommodation associations
	Congress & convention centers	International/National MICE tourism associations (e.g. ICCA, MPI, UIA, SITE) <sup>2</sup>
	Restaurant, leisure operators	National, regional restaurants unions/association (e.g. Association suisse des cafetiers, restaurateurs et hôteliers.)
	Transport providers	International Transport Association (e.g. IATA, UITP <sup>3</sup> etc.)
	Local travel agencies ( e.g. incoming agent, DMC agencies), internal meeting planners	TO, PCO (professional congress organizers), external meeting planners
	Real estate-agencies	Different international or national associations, unions

Source: Own elaboration based on: UNWTO, (2007).

As stated by Briassoulis (2002); Byard, Cardenas & Dregalla (2009) and other authors throughout the literature, stakeholders and local populations must be involved in any successful and sustainable tourism development plan to handle multiple

<sup>2</sup> ICCA – International Congress & Convention Association, MPI – Meeting Professional International, UIA - Union of International Associations, SITE - Society of Incentive Travel Executives

<sup>3</sup> UITP - International Association of Public Transport

perceived issues of destinations and must be reflective of community interests and opinions.

There are three possible levels of co-operation between stakeholders and the DMO: limited, moderate and board co-operation (Alter, Hage, 1993).

1. **Limited co-operation:** expressed in very limited participation of stakeholders (in terms of time and money) in activities managed by DMO. It could be, for example, stakeholders participation in information meetings organized by DMO.
2. **Collaboration on a moderate level:** based on partial or punctual participation of private partners in some DMO's actions (e.g. common promotional campaign).
3. **Board co-operation:** refers to considerable engagement of public and private partners in good management of a tourist destination. This cooperation can concern, for example, the creation of joint products (tourist packages) or elaboration of common distribution and sales system, via integrated reservation system.

Otherwise, in many destinations the decision-making process is top-down, i.e. "leaders" decide which often may result in communication breakdown and lead to conflicts (Ioannides, 1995; Beritelli, Leasser, 2011). On the other hand, DMO financial resources are highly dependent on various groups of public and private stakeholders (Beritelli, 2009, Beritelli, 2011). This fact can often cause pressure and lobbying by different interest groups that influence DMOs' functioning and provoke conflicts<sup>4</sup>.

Thus DMOs should stay independent and play an important role in leadership and advocacy for the whole destination (Ritchie, 1993; Byrd, Gustke 2004).

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<sup>4</sup> The extreme example of bad cooperation between public and private stakeholders which led to the dissolution of a DMO was the case of the regional DMO in Val d'Anniviers (Switzerland), which broke down in 2010 and was divided into several small local entities.

#### **1.4. Sustainable development of tourism destination and contemporary tourist's demand**

According to analyses done by UNWTO experts, the number of international tourist arrivals increased from 220 million to 935 million between the years 1975 and 2010<sup>5</sup>. By the year 2020 the number of international tourist arrivals is expected to exceed 1.5 billion (which means an average annual increase of 4.2% in the number of tourists) (Dwyer, et al., 2008; UNWTO, 2011).

Since local resources (tourist attractions) are finite, competitiveness especially of many mature destinations (e.g. the Alps) becomes increasingly related to the maintenance of their natural assets and sustainability (Abegg, et al. 2007; Agrawala, 2007; Bramwell et al. 1996; Bartaletti, 2002; Bourdeau, 2006; CIPRA, 2011; Hardy, & Beeton 2001; Johnsen, Umbach-Daniel, & Schnell, 2003; Ritchie 2003).

Sustainable development is not a new term. The most widely accepted definition was introduced in 1996 by UNWTO and describes sustainable tourism as: *“tourism which leads to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems”* (UNWTO, WTTC, & Earth Council, 1996).

Middleton (1998) stresses that the development of tourism in destinations should be founded on a suitable interaction between 3 terms: economy, ecology and fair distribution of resources (see Figure 4). Economy means profits; ecology implies the respect of ecosystems; equity refers to the suitable use of natural and cultural resources and finding a balance between the needs and the interests of tourists as well as of local residents.

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<sup>5</sup> World Tourism Organization releases tourist arrival statistics ([worldtourismdirectory.com](http://worldtourismdirectory.com))

**Figure 4. Sustainable tourism development concept**



Sources : Middleton, (1998); UNEP. (2003).

In economic regard, sustainable development becomes of central importance especially in nature-based tourist destinations (e.g. European mountain regions) where tourism often represents the main source of income and employment for the host communities. Nevertheless, those areas remain peripheral as compared to other tourist regions in Europe and it is most sensitive to environmental, economic, social and demographic stresses. Hence, the competitiveness of many mountain destinations (e.g. The Alps) requires finding the right balance between competing and challenging goals such as:

- preserving natural resources and minimizing the negative impact on tourism to conserve a destination's richness for future generations, (Buhalis, 2000; Bonardi, Ludovici, & Furlani 2006; Fennel, 2008; Honey, 1999)
- increasing destination appeal and reputation as sustainable and "environment-friendly", (Crouch 2007; Osmankovic, Kenjic & Zranic, 2010; Wight, 1998; Wray, et al. 2010).

- maximizing tourism's economic contributions to local populations (Crouch, Ritchie, 1999; Ritchie, 2003; Simpson, 2008; Tosun, Timothy, 2003)
- increasing the well-being of local populations and public and private stakeholders (Aas, Ladkin, & Fletcher, 2005; Bornhorst, et al. 2010).
- fulfilling the needs of visitors and shifting their interest to products focused on sustainable resource consumption (Budeanu, 2007; Leire & Thidell, 2004; Lohmann, 2004; Miller, 2003; Paul, et. al. 2002; Sharpley, 2006).

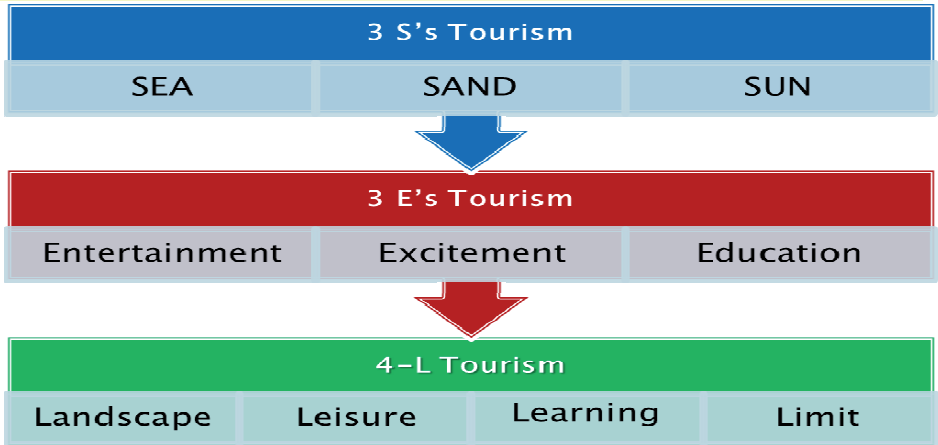
An important issue for contemporary DMOs concerns the changing nature of tourism consumers. In fact, an increasing number of "21st century visitors" (especially coming from well developed countries) are showing their willingness to go back to nature, and eco- and nature-based holidays are becoming trendy (Page, Dowling, 2002; Forster, et al. 2011). Moreover, according to Chitra (2007) the majority of green consumers are willing to pay more for green products and send out a positive signal to an eco-friendly marketing mix.

The shift from mass-tourism based on the formula of the 3 "S's" (Sea, Sand, Sun ) to sustainable and responsible tourism based on the 3 E's (Entertainment, Excitement, and Education) is linked with the fashionable "green" life style and growing awareness of ecological problems (Dwyer, et al. 2008; Kester, 1999; UNTWO, 2002). A good example of the demand change, is the emergence in Alpine regions of a new form of tourism called "4-L tourism" (Landscape, Leisure, Learning and Limit) (Franch, et al. 2008). "4-L tourists" can be characterized by their high level of respect for natural attractions, their recognition of the importance of the local culture and traditions, their interest in learning about the unique features of the destination and their awareness of the limits of resources.

The transition from mass- tourism to green and responsible tourism illustrates Figure 5.



**Figure 5. The evolution of tourist demand from 3 x “S’s” formula vs 3 x “E’s” and 4 x “L”tourism**



Source: own elaboration based on: Dwyer, et al., (2008); Franch, et al., (2008); Kester, (1999); UNTWO, 2002

More and more visitors are becoming experienced and empowered consumers capable of comparing the value of the tourist offer via easy internet access (Laesser, et. al 2007). Due to the abundance of information, tourists are better informed, but also more individualistic and more unpredictable (Gretzel, Fesenmaier, & O’Larey, 2006). Lack of loyalty, increasing demand for individualized holidays (often in the form of dynamic packaging) and having new experiences seem to be the most important features of contemporary tourist demand (Ritchie& Hudson, 2009).

As a result, DMOs as purveyors of information about destinations are increasingly required to reengineer their activities and offers around the use of different web solutions (Buhalis, Zoge, 2007; Clarke, et al. 2009).

## II. Questions to solve

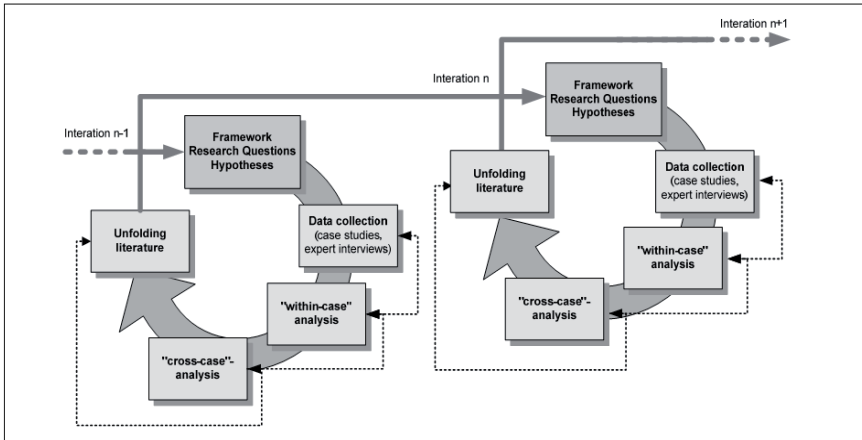
Referring to the literature review mentioned above, this research focused on finding answers to the following questions:

1. What are the main tasks of DMOs in the Alpine countries and tourism organizations in Poland? Are there any differences in this aspect between countries?
2. Can the DMO concept be better characterized through the type of tasks executed in public-private partnership?
3. Are DMOs in the Alpine Arc and tourism organizations in Poland satisfied with the cooperation between them and their public and private partners?
4. What are and will be the most important success factors of Alpine DMOs in comparison to Polish tourism organizations up to 2020?
5. Are DMOs a positive vector for the implementation of a sustainable development strategy?
6. Does sustainability have a real impact on a destination performance?
7. Are the most competitive DMOs in the ranking of BAK TOPINDEX 150 also the most sustainable ones?
8. To what extent can the (Alpine/Swiss) model of destination management organization be adapted in other countries (e.g. in Polish tourism)?

## III. Methodology

This research is the “bottom-up” approach based on the idea of building “grounded theory” from Glaser (1998). This method offers clear advantages in enabling the researcher to build theory from the actions, words and behavior of the people under study (see Figure 6.).

**Figure 6. Interactive process to develop theory from case studies**



Source: Glaser, (1998)

The research was organized in the following two main work packages and tasks:

WP1: November 2010 – April 2011

- 1) Literature review: state of the art with respect to destination management theory and sustainable tourism. Development of research questions.
- 2) Conception of the study framework and development of research instruments (incl. validation of questionnaire)
  - a. Text-mining of websites of destination organizations: measuring the importance of sustainable development in the communication strategy of tourism destinations
  - b. Questionnaire survey for destination managers in Alpine destinations: assessing management practices in Alpine tourism resorts, testing the link between sustainable development strategy and destination performance
  - c. Developing guidelines for qualitative interviews
- 3) Lexical analysis of destination websites with a web bot and interpretation of results

WP2: May 2011 – November 2011

- 4) Administration of survey to destination managers in Switzerland.
- 5) Analysis of Swiss data.
- 6) Administration of survey to destination managers in other countries of the Alpine arc (international extension of survey) and in Poland
- 7) Conducting selected qualitative interviews in Switzerland and in Poland.
- 8) Carrying out the comparative data analysis between DMOs from Alpine Arc countries and Poland. Identifying best practice examples.
- 9) Synthesis data report (incl. evaluation of the transferability of the DMO concept to other countries, i.e. Poland).

The literature review and interviews/discussions with practitioners from tourism destinations (i.e. Mr. Broccard, former CEO of Sierre - Val d'Anniviers Tourism (CH), Mr. Jean-Marc Jacquod, Director of Sion Tourism (CH) and Mrs. Jolanta Grus, Pawel Lewandowski and Mr. Robert Kempinski managing board from Polish Tourism Organization, Mr. Pierto Beritelli – Professor at St -Gallen University, Mrs. Miriam Scaglione-Professor at University of Applied Sciences Western Switzerland -Valais ) were the basis for the development of the overall study design and more specifically the research instruments which were created, tested and validated.

WEB-MINING (task 3): Established study sample (data base of DMOs from the Alpine arc), tested web-crawler technology and a list of key words referring to sustainable development of tourism destination. The aim of the web-mining approach was to evaluate how important sustainable development issues are for destination management organizations in the Alps by studying their websites using a text mining approach of their online communication. Based on an exhaustive list of Alpine

destinations used for the benchmark study of BAK Basel (BAK TOPINDEX 150)<sup>6</sup>, a database of 248 Alpine destinations from six countries was established. A literature review helped in elaborating the list of pertinent key words concerning sustainable tourism development in mountain areas which was used to carry out a lexical analysis. Firstly, a web-crawler provided by SAS Institute(c) 9.2 downloaded from the websites up to the depth of level five all the texts and web pages (html) in a text file. Then, a customized parsing program counted the presence of key words defined.

The results of this study were presented in a conference paper submitted to the 61st Aiest (International Association of Scientific Experts in Tourism) conference in Barcelona and will not constitute the subject of this book<sup>7</sup>.

DESTINATION MANAGER SURVEY: a questionnaire entitled “The role of DMO in (sustainable) management of tourism destinations” was created in French, German, English and Polish. The questionnaire was composed of 44 questions concerning five main topics:

- general information about type, dimension and DMOs tasks;
- public-private partnership;

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<sup>6</sup> Each year BAK BASEL measures the performance of 150 European Alpines destinations in order to show the most successful ones and create the benchmark study for Swiss destinations. This index called BAK BASEL TOPINDEX 150 is based on the 15 success factors (Basel, 2010). Among the most important criteria are:

- the highly qualified staff in tourism,
- the presence of high quality hotel sector,
- the development of hotel overnights and high hotel occupancy rates,
- the quality of the tourism in winter,
- the quality of the tourism in summer,
- the image of authenticity and notoriety of the destination (USP –unique selling proposition)
- the importance of tourism for local population
- the importance of good cooperation between public and private stakeholders

Those criteria constitute also important issues to present study, especially to the development of research instruments (i.e. questionnaire) some validation of research questions.

<sup>7</sup> Klimek, K., Scaglione, M., Schegg, R. & Matos. R. (2012). *Marketing and Sustainable Tourism in Alpine Destinations*. In InternationalTourism Researchand Concepts: New Challenges for Tourism Promotion. (pp. 155-167). Berlin: Erich Schmid Verlag.

- success factors of the destination;
- sustainable tourism and public-private partnership,
- sustainable tourism and destination performance (see Annex 1.)

To complete the quantitative research, direct and phone interviews were conducted with eleven DMOs in Switzerland and five tourism organizations in Poland selected on the basis of survey results. Selected DMOs should fulfill at least one of the following criteria:

- involving sustainability principles in their marketing concept;
- be certified by an eco-label;
- be strongly committed to sustainable tourism product development;
- operating in “environmentally clean” regions.

The list of destinations and interviewed persons is presented in Table 4.

<b>Table 4. List of interviewed destinations'</b>	
	<b>Destination</b>
1.	Fribourg Region/CH
2.	Les Paccots/CH
3.	St Moritz Tourism Board/CH
4.	Yverdon-les-Bains Tourism Office/CH
5.	Lenk-Simmental Tourism Office/CH
6.	Jura Region Tourism Office/CH
7.	Bern Tourism/CH
8.	Genève Tourism/CH
9.	Leysin Tourism/CH
10.	Sion Tourisme/CH
11.	Lago Maggiore Tourist Office /CH
12.	Kociewie Local Tourism Office/ PL

13.	ława Local Tourism Office/PL
14.	Mazury Regional Tourism Office/PL
15.	Roztocze Local Tourism Office /PL
16.	Opole Regional Tourism Office

The persons interviewed were asked to answer the following questions:

- What type of eco-label do you have (if any)?
- Do you encourage your partners to have this kind of certification?
- What kind of “green” product(s) have you been developing and to what kind of public (market segment) are aimed at?
- Is sustainability an important issue for your marketing strategy– by what specific action(s) does it manifest?
- On which principle do you base the public-private partnership in your destination (if it actually exists) – this question was asked in particular to Polish tourism organizations.

On the basis of literature review and the empirical data from survey and interviews, a comparative analysis was carried out, the results of which are presented in this book.

## IV. Results

### 4.1 Description of the sample

The sample selection was intentional. The study covered 272 tourism organizations coming from six Alpine countries (Switzerland, France, Germany, Austria, Italy, Slovenia) and from Poland<sup>8</sup>.

To fulfill the methodological objectives the sample was divided into three main groups:

1. DMOs from Switzerland
2. DMOs from other Alpine countries (i.e. France, Germany, Austria, Italy, Slovenia)
3. Local and regional Tourism Organizations in Poland.

Regarding the type of organization, the sample consisted of:

- National Tourism Organizations
- Regional Tourism Organizations
- Local Tourism Organizations

The return rate amounted to 26.47%, which means that 72 tourism organizations participated in the study (i.e. 47 DMOs from Switzerland, 13 from Poland and 12 from other Alpine countries) (see Annex 2).

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<sup>8</sup> As regards to Poland it should be noted that the DMO concept is hardly known in this country. Also principles of public and private partnership are not generally implemented enough in practice. Observations of the Polish tourism market show that every region uses its own model of management, without trying to act on the basis of public-private partnership (which is the core of the DMO approach). This leads to frequent conflicts among different interest groups (e.g. between tourist services suppliers and local authorities etc.).



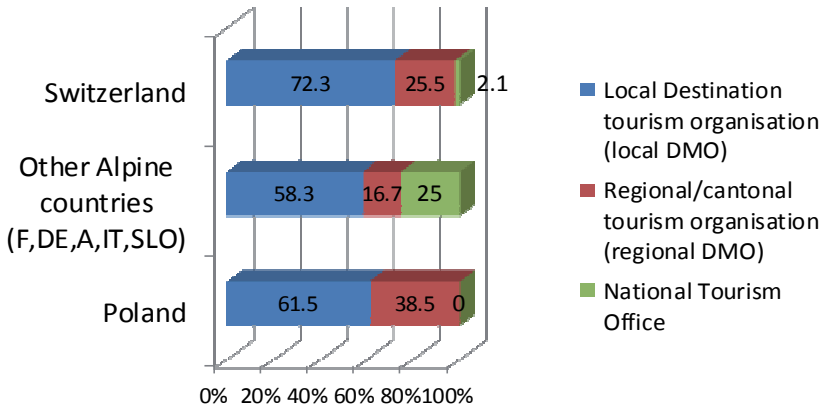
The sample is overrepresented by local tourism organizations (68.1 %) and by Swiss DMOs, which consist of 65.2% of the total sample, meaning that certain results should be interpreted with caution (see Table 5. and Figure 7.).

**Table 5. Types of organization - by country**

Type of tourism organization	Switzerland		Poland		Other Alpine countries (F,DE,A,IT,SLO)		Total	
	N	% cit.	N	% cit.	N	% cit.	N	% cit.
Local tourism organizations	34	72.3%	8	61.5%	7	58.3%	49	68.1%
Regional tourism organizations	12	25.5%	5	38.5%	2	16.7%	19	26.4%
National Tourism Offices	1	2.1%	0	0.0%	3	25.0%	4	5.6%
<b>Total</b>	<b>47</b>	<b>100.0%</b>	<b>13</b>	<b>100.0%</b>	<b>12</b>	<b>100.0%</b>	<b>72</b>	
<b>Share of the countries in the sample</b>		<b>65.2%</b>		<b>18.05%</b>		<b>16.6%</b>		

p = 2.2% ; chi2 = 11.42 ; dof = 4 (S) Dependence is significant.

**Figure 7. Types of organization - by country (in %)**



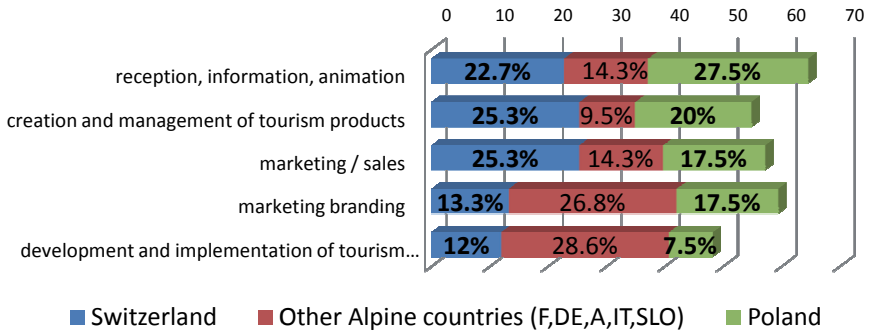
## 4.2 Tasks of tourism organizations

Referring to the literature review and the first research question, there are some differences between DMOs under study with regard to tasks performed by tourism organizations by country. Tourism organizations from Other Alpine Countries seem to be less involved in creation and management of tourism products in comparison to Swiss and Polish entities. Nevertheless, those organizations are more focused on marketing branding and development of tourism policy than Swiss and Polish entities (see Table 6. and Figure 8.).

**Table 6. Main tasks of organization - by country**

Main tasks	Switzerland	Other Alpine countries (F,DE,A,IT,SLO)	Poland	Total
1. reception, information, animation	22.7%	14.3%	27.5%	22.8%
2. creation and management of tourism products	25.3%	9.5%	20.0%	21.3%
3. marketing / sales	25.3%	14.3%	17.5%	21.3%
4. marketing branding	13.3%	28.6%	17.5%	16.9%
5. development and implementation of tourism policy	12.0%	28.6%	7.5%	13.2%
6. other	1.3%	4.8%	10.0%	4.4%
<b>Total</b>	100.0%	100.0%	100.0%	

**Figure 8. Main tasks of organization - by country**



Referring to tasks performed by DMOs presented in detail in the previous table, as well as in the first part of this report (chapter 1.2), it is very important to define which organization can be considered as a “real” DMO. Therefore, the sample was divided into three groups according to the function of performed tasks:

DMO type	Number of performed tasks
1. “Real” DMO	4 and more
2. “Partial” DMO	From 2 to 4
3. “No” DMO	1

Switzerland has the biggest number of “real” and “partial” DMOs, which means that the DMO concept in this country is very well developed and implemented (see Table 7). In other Alpine countries the distribution of “real”, “partial” and “no” was equal and constituted one third in each of the cases.

**Table 7. Distribution of “Real”, “Partial”, “No” DMO - by country**

DMO	Switzerland		Other Alpine countries (F,DE,A,IT,SLO)		Poland		Total	
	N	% cit.	N	% cit.	N	% cit.	N	% cit.
yes	23	48.9%	4	33.3%	4	30.8%	31	43.1%
partially	18	38.3%	4	33.3%	8	61.5%	30	41.7%
no	6	12.8%	4	33.3%	1	7.7%	11	15.3%
<b>Total</b>	47	100.0%	12	100.0%	13	100.0%	72	

As far as Poland is concerned, more than half of the Tourism Organizations under the study (61.5%) can be considered as “partial”. In fact, as mentioned before, the DMO concept has not been well developed yet in Polish tourism and DMOs in this country are mostly at an early stage of consolidation. This is why they need best practice examples from countries that have already introduced DMO-based standards. Results from this research project provide the first step towards the implementation of advanced destination management tools in Poland.

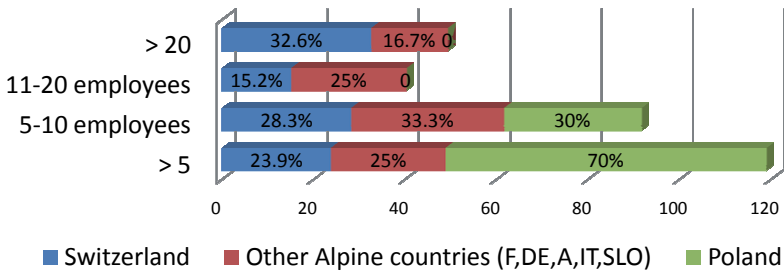
### 4.3 DMO and destination dimensions

#### 4.3.1. Number of staff

The number of staff (as a full time equivalent) is an important factor to describe the DMOs size. The scale of the NTO’s operations in comparison to regional and local entities becomes immediately apparent. In fact, half of the NTOs under study have more than 20 employees. Concerning regional organizations, one third of them employed from 5 to more than 20 people. Local organizations can be characterised as small entities where 40% of the time there are less than 5 staff members (see Table 8 and Figure 9).

**Table 8. Number of employees - by type of organization and by country**

Type of organization	< 5	5-10	11-20	> 20
National Tourism Offices	0.0%	33.3%	0.0%	66.7%
Regional DMOs	15.0%	25.0%	30.0%	30.0%
Local DMOs	40.0%	31.1%	8.9%	20.0%
Country				
Switzerland	23.9%	28.3%	15.2%	32.6%
Other Alpine countries (F,DE,A,IT,SLO)	25.0%	33.3%	25.0%	16.7%
Poland	70.0%	30.0%	0.0%	0.0%

**Figure 9. Number of employees - by country**

In particular, Poland seems to be dominated by organizations of very small sizes, having less than five staff members (70% of the cases). This tendency probably stems from the fragmentation of the tourism sector in Poland in which 80% is made up of micro and small businesses (OCED, 2010).

#### 4.3.2. Number of overnights in hotels and self-catering sector

The number of overnights in hotels and self-catering accommodation within the region/place that the DMO is responsible for is illustrated by the variation in destination market size (see Table 9.).

**Table 9. Overnights in hotels in 2010 - by country and by DMO type**

Country/DMO type	< 200'000	200'000 to 500'000	500'000 to 1'000'000	> 1'000'000
Switzerland	40.9%	22.7%	9.1%	27.3%
Other Alpine countries (F,DE,A,IT,SLO)	25.0%	16.7%	25.0%	33.3%
Poland	66.7%	0.0%	16.7%	16.7%
<b>All countries</b>	42.6%	17.6%	13.2%	26.5%
National Tourism Offices	33.3%	0.0%	0.0%	66.7%
Regional DMOs	30.0%	20.0%	20.0%	30.0%
Local DMOs	48.9%	17.8%	11.1%	22.2%

More than 40% of tourist destinations under study in Switzerland and 66% in Poland can be characterized as small, whereby the number of overnights in hotels in 2010 did not exceed 200'000. NTOs and regional DMOs operated, in general, more frequently in big destinations (> 1'000'000 of overnights) rather than local entities.

These tendencies are almost similar as far as overnights in the self-catering sector are concerned by country (see Table 10). The main differences concern the size of the destination operated by a regional DMO in Other Alpine Countries. Those destinations are bigger in hotel offer and smaller concerning the self-catering sector.

For accurate interpretation of this data, it should be kept in mind that local DMOs representing small destinations (< 200'000 overnights) are overrepresented in this sample both in terms of overnights in hotels as well as in the self-catering sector (compare Tables 9. and 10.)

**Table 10. Overnights in the self-catering sector in 2010 (by country and by DMO type)**

Country/DMO type	< 200'000	200'000 to 500'000	500'000 to 1'000'000	>1'000'000
Switzerland	46.2%	20.5%	17.9%	15.4%
Other Alpine countries (F,DE,A,IT,SLO)	55.6%	11.1%	22.2%	11.1%
Poland	54.5%	18.2%	0.0%	27.3%
<b>All countries</b>	49.2%	18.6%	15.3%	16.9%
National tourism offices	50.0%	0.0%	0.0%	50.0%
Regional DMOs	38.9%	27.8%	5.6%	27.8%
Local DMOs	53.8%	15.4%	20.5%	10.3%

Moreover for almost 50 years the self-catering sector has represented a very important part of accommodation, especially in Switzerland and the Alpine Arc countries. In Swiss tourism the number of traditional forms of accommodation such as hotels is currently declining. At the same time, the quantity of holiday homes in Switzerland has been steadily increasing since the 1980s (Nicod, Mungall & Henwood, 2007).

#### *4.3.3. Overnight evolution during the last five years*

Performance of DMOs and tourism destinations under study can be expressed by the average growth rate of overnights in hotels and the self-catering sector.

In terms of the hotel sector, the biggest growth (38.5%) of overnights for the period of 2005-2010 took place in Poland (see Table 11.). This trend was certainly caused by the dynamic increase in the number of hotels and growing popularity of Poland as a travel destination. According to the statistics, the total number of hotels over the last five years has grown in this country by 45.6% (Institute of Tourism, Warsaw 2011).

**Table 11. Evolution of overnights in hotel industry between 2005 and 2010 -by country**

	< -10%	-10% to -5%	-5% to -1%	-1% to +1%	+1% to +5%	+5% to 10%	>+10%	Total
Switzerland	2.4%	9.5%	9.5%	23.8%	35.7%	11.9%	7.1%	100.0%
Other Alpine countries (F,DE,A,IT,SLO)	0.0%	0.0%	8.3%	0.0%	50.0%	16.7%	25.0%	100.0%
Poland	7.7%	0.0%	0.0%	15.4%	15.4%	23.1%	38.5%	100.0%
<b>All countries</b>	3.0%	6.0%	7.5%	17.9%	34.3%	14.9%	16.4%	

During that period, the most dynamic growth (from +5% to 10% and >10%) of overnights in the self-catering sector took place in Other Alpine Countries (42.9 %, 14.3%). In Switzerland this growth was rather moderate and ranged from a 15% decrease (between -5% and -1%) to 17.5% growth (from +5% to 10%). As regards to Poland, the self-catering sector is quite popular as a form of accommodation but it rather concerns accommodation in pensions, private rooms and agritourism farms than in second homes. Hence, overnight stays have shown a wide spread of evolution between the decrease of 9.1% to 27.3% and increase up to 10% (see Table 12.).

**Table 12. Evolution of overnights in self-catering industry by country between 2005 and 2010**

	< -10%	-10% to -5%	-5% to -1%	-1% to +1%	+1% to +5%	+5% to 10%	>+10%	Total
Switzerland	2.5%	0.0%	15.0%	30.0%	30.0%	17.5%	5.0%	100.0%
Other Alpine countries (F,DE,A,IT,SLO)	0.0%	0.0%	14.3%	14.3%	14.3%	42.9%	14.3%	100.0%
Poland	0.0%	9.1%	9.1%	18.2%	27.3%	27.3%	9.1%	100.0%
<b>Total</b>	1.7%	1.7%	13.8%	25.9%	27.6%	22.4%	6.9%	

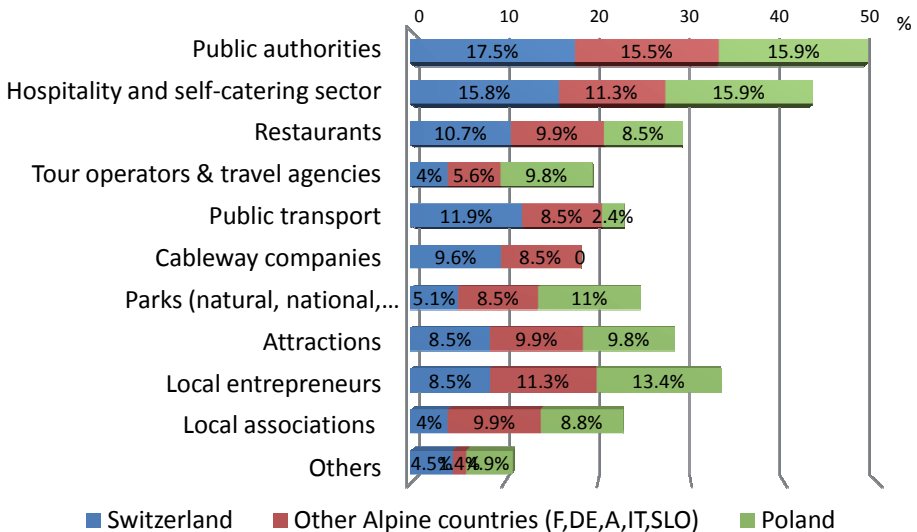


#### 4.4. Public-private partnership

##### 4.4.1 Type and areas of cooperation between DMOs and their stakeholders

As far as cooperation between DMOs and their partners, there are more similarities between Other Alpine Countries and Polish tourism organizations than between Switzerland and the rest of the sample (see Figure 10.). The three most important partners for Alpine Countries and Poland are: public authorities, hospitality and the self-catering sector and local entrepreneurs. For Swiss DMOs cooperation between public sector and hospitality & restaurant and public transport is most important. It can be explained by the fact that public transport plays a very important role in the creation of Swiss integrated tourism products (packages) which very often include accommodation and ticket for public transport or for a cable car.

**Figure 10. Cooperation between DMOs and their public and private partners**

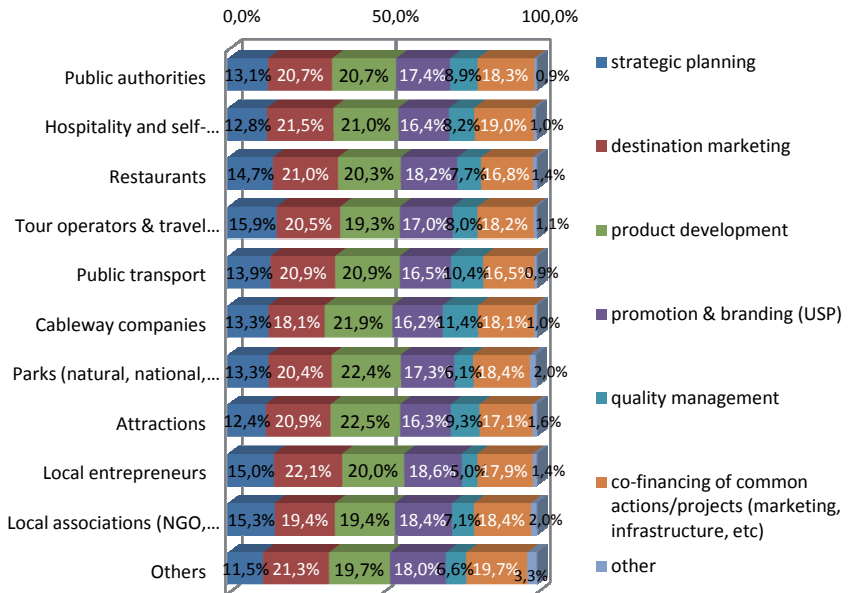


Referring to the areas of cooperation between DMOs and their stakeholders, public and private partners are involved mostly in the four following strategic areas of DMOs activities:

- destination marketing
- product development
- co-financing of common tasks
- promotion and branding (destination USP) (see Figure 11.).

Cooperation between DMOs and their partners concerning strategic and quality management and other tasks seems to be less important.

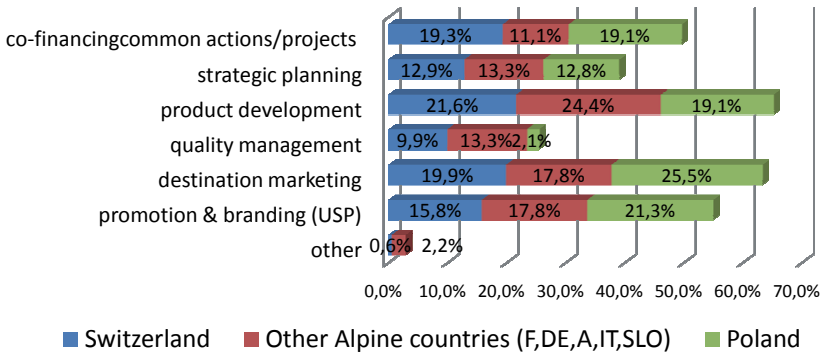
**Figure 11. Areas of cooperation with public and private partners**



As far as the areas of cooperation by country, Swiss and Other Alpine Countries DMOs cooperate with their partners mostly in the areas of product development destination marketing and promotion & branding of the destination (see Figure 12.).

For Polish tourism organizations and their stakeholders the most important common tasks consist of: destination marketing & promotion and branding as well as co-financing of common projects. Financial involvement of partners in different projects is equally important for both Polish and Swiss DMOs.

**Figure 12. Areas of cooperation with partners - by country**



The obtained results allow to better characterize the DMO concept through public-private partnership and to find the answer to the second research question.

*4.3.2 The level of satisfaction concerning the cooperation with public and private partners*

Referring to the third research question, tables of means show that DMOs managers are, in general, fairly satisfied, also with regard to the level of cooperation with the public authorities and private partners. Swiss DMOs express the highest level of

satisfaction regarding cooperation with cable car companies, public bodies, local entrepreneurs, tourism attractions and parks (see Table 13.). Polish tourism organization managers are, in general, fairly satisfied and satisfied as far as collaboration with parks, attraction sector and public authorities.

**Table 13. The level of satisfaction concerning the cooperation of DMOs with their partners –by country**

	Switzerland	Poland	Other Alpine countries (F,DE,A,IT,SL O)	Total
Public authorities	3.84	3.77	3.50	3.76
Hospitality and self-catering sector	3.47	3.38	3.17	3.40
Restaurants	3.08	3.18	2.45	2.98
Tour operators & travel agencies	3.04	3.20	2.45	2.93
Cable car companies	4.06	3.00	3.50	3.90
Public transport	3.42	3.00	2.90	3.29
Parks (natural, national etc.)	3.43	4.14	3.38	3.56
Attractions	3.58	4.00	3.63	3.67
Local entrepreneurs	3.63	3.45	3.17	3.50
Local associations	3.53	3.85	3.27	3.55
<b>Total</b>	3.52	3.57	3.12	3.45

Evaluation of scale modalities: - (not concerned) ; 1 (not at all satisfied) ; 2 (unsatisfied) ; 3 (fairly satisfied) ; 4 (satisfied) ; 5 (very satisfied)

National and regional DMOs from Other Alpine Countries seem to be less satisfied regarding cooperation with restaurants, travel agencies and cable car companies and public transport (see Table 14.). However, the result is slightly significant so there is possibly a high level of guessing in those responses.

**Table 14. The level of satisfaction concerning the cooperation of DMOs with their partners - by DMO type**

	<b>National Tourism Offices</b>	<b>Regional DMOs</b>	<b>Local DMOs</b>	<b>Total</b>
Public authorities	4.00	3.76	3.75	3.76
Hospitality and self-catering sector	3.67	3.53	3.05	3.40
Restaurants	2.33	3.18	2.67	2.98
Tour operators & travel agencies	3.33	2.90	2.92	2.93
Cable car companies	2.50	3.97	4.00	3.90
Public transport	2.67	3.33	3.31	3.29
Parks (natural, national, etc.)	3.50	3.44	3.89	3.56
Attractions	4.00	3.76	3.33	3.67
Local entrepreneurs	3.33	3.60	3.17	3.50
Local associations	3.00	3.66	3.29	3.55
<b>Total</b>	<b>3.23</b>	<b>3.52</b>	<b>3.30</b>	<b>3.45</b>

Evaluation of scale modalities: - (not concerned) ; 1 (not at all satisfied) ; 2 (unsatisfied); 3 (fairly satisfied) ; 4 (satisfied) ; 5 (very satisfied)

#### **4.5. Current and future success factors for tourism destinations**

To find the answer to the next research question, respondents were asked to select current and future success factors of their destinations.

Among the 15 statements, respondents from all countries indicated unique natural resources as a key issue for current development of their destinations (see Figure 13.).

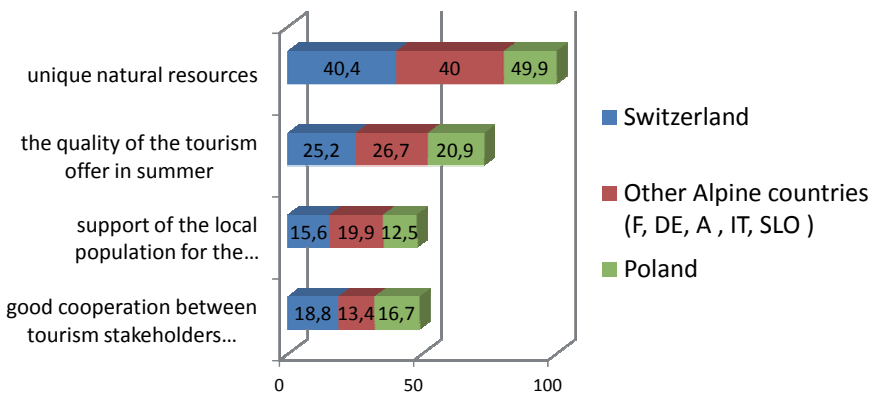
Three other following success factors are important for all DMOs under study:

- good quality of tourism offer in summer,
- good cooperation between tourism stakeholders

- support of the local population for the tourism industry.

Apart from this, the importance of efforts in tourism marketing and the presence of a strong cableway company are important for Swiss and Polish DMOs. A high quality of winter seems to be the most important things for DMOs in other Alpine countries.

**Figure 13. Current most important success factors for tourism destinations by country (in %)**



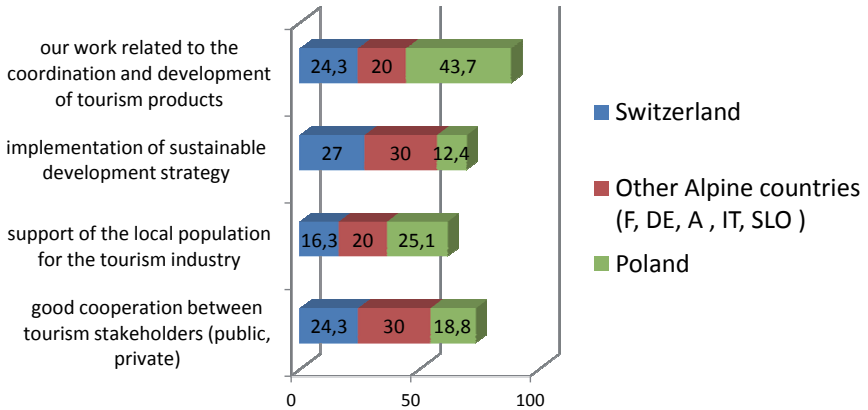
Development of tourist products and implementation of sustainable development strategy seem to be two of the most important future success factors emphasized for all DMOs under study (see Figure 14.).

The majority of respondents also consider good cooperation between different group of interest and support of local residents as key factors for future development of their destinations.

According to the Swiss and Polish respondents, future development of their destinations will be also linked to the presence of a strong hotel sector and good

capacity of innovation (which also confirm the results of interviews mentioned above).

**Figure 14. Future most important success factors for tourism destination by country (in %)**



It should to be emphasized that the majority of current and future success factors chosen by our respondents are also enumerated as key success factors in BAK Basel Top Index (BAK BASEL, 2011).

#### 4.6 Sustainable tourism and public-private partnership

##### 4.6.1 The importance of sustainability for DMOs strategies of development and ecolabelling

When it comes to the degree of involvement of DMOs in implementation of sustainable tourism in management tasks (fifth research question), generally the principles of sustainability are well known but are not sufficiently implemented in practice, which confirms significant results from Table 15 .

**Table 15. The implication of DMOs strategy in sustainable tourism - by country**

	Switzerland	Other Alpine countries (F,DE,A,IT, SLO)	Poland	Total
no involvement / activity in sustainable development	16.7%	0.0%	60.0%	20.3%
sustainable development strategy exists, but it is not applied or poorly applied	47.6%	58.3%	10.0%	43.8%
sustainable development strategy exists and is implemented with success	35.7%	41.7%	30.0%	35.9%
<b>Total</b>	100.0%	100.0%	100.0%	

$p = 0.7\%$  ;  $\chi^2 = 14.01$  ;  $dof = 4$  (VS)

Dependence is very significant.

In almost 48% of Swiss, 58% of Alpine and 10% of Polish destinations, sustainable strategy exists but is not applied at all or applied poorly. In fact, as many as 60% of Polish DMOs do not apply sustainable strategy at all.

This tendency also finds confirmation in the interviews which were conducted in Switzerland and in Poland in September 2011. The responses received from, for example: Bern Tourism, Geneva Tourism and Congress, Jura Tourism, Les Paccots Tourism, Yverdon les Bains Tourism, as well as Roztocze Tourism Office in Poland, show that sustainability is not currently playing an important role in the development strategy of those destinations but will be taken into consideration in the future.

Most successful DMOs in this area are the ones from Other Alpine Countries. In fact, more than 41% of them are currently implementing sustainable strategy with success.



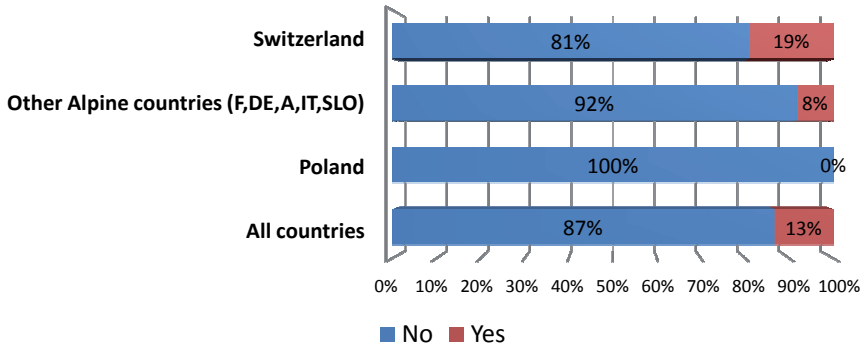
Regarding involvement of sustainability in DMOs strategy, by type of entities; one third of local and regional tourism organizations and all NTOs under study are successfully implementing the principles of sustainable development in their development strategy. For 50% of local DMOs and almost 37% of regional entities, sustainability is still an emerging subject which will be important in the future (see Table 16.)

**Table 16. The implication of DMOs strategy in sustainable tourism – by DMOs type**

	<b>National Tourism Offices</b>	<b>Regional DMOs</b>	<b>Local DMOs</b>	<b>Total</b>
no involvement / activity in sustainable development	0.0%	26.3%	19.0%	20.3%
a sustainable development strategy exists, but it is not applied or poorly applied	0.0%	36.8%	50.0%	43.8%
a sustainable development strategy exists and is implemented with success	100.0%	36.8%	31.0%	35.9%
<b>Total</b>	100.0%	100.0%	100.0%	

It should be noted that the issues related to sustainable development of some destinations are confirmed by ecolabelling (Figure 15.).

**Figure 15. Importance of ecolabelling - by country and by DMO type**

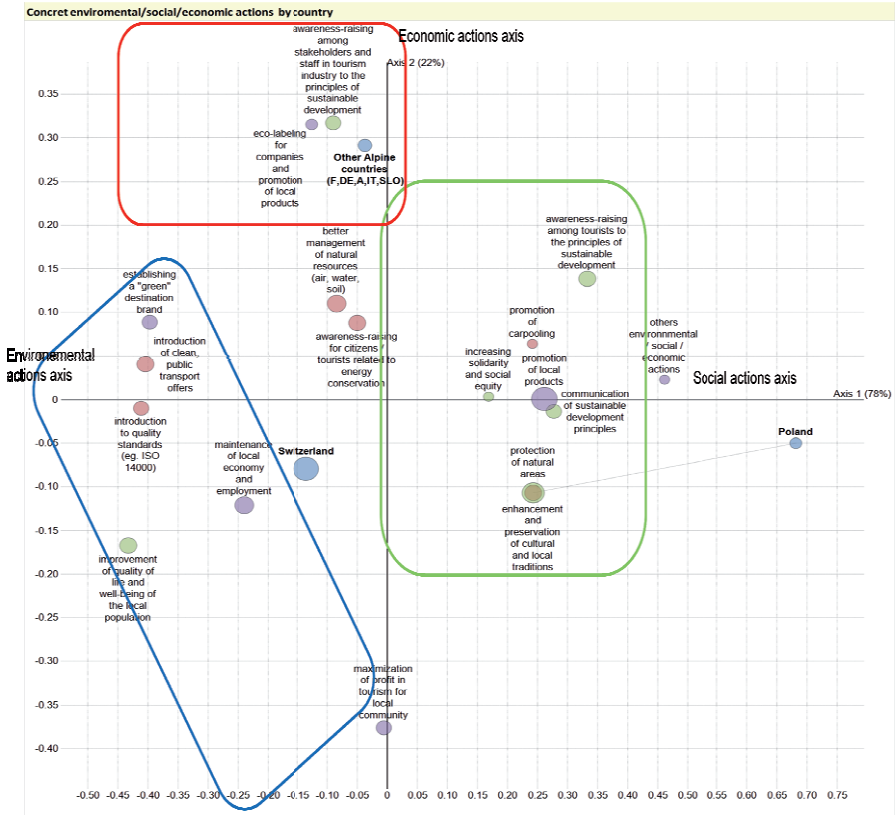


In fact, only 19% of Swiss and 8.3% of Other Alpine local and regional destinations are currently in possession of an eco-label. Moreover, none of the Polish tourism organizations under study have been granted this type of certification.

#### 4.6.2 Involvement of DMOs in concrete sustainable initiatives

Despite to the fact that only one third of the DMOs under study are actively implementing sustainability in their development strategy, many of them are conducting concrete environmental/social/economic actions (see Figure 16.)

**Figure 16. Factorial analysis of concrete environmental/social/economic actions - by country**



The factorial analysis shows that Swiss DMOs seem to be more linked to the environmental actions axis than tourist organizations from other countries. Introduction of clean public transport offers and of quality standards (e.g. ISO 14000) appear as two of the most important environmental actions realized by Swiss tourism. Tourist organizations from Other Alpine countries are more focused on economics actions (i.e. eco-labeling for companies and promotion of local products). Polish entities seem to be more linked to the axis of social actions (i.e. enhancement and preservation of cultural and local traditions, increasing solidarity

and social equity, communication of sustainable development principles). Better management of natural resources (air, water, soil) and awareness-raising for citizens and tourists related to energy conservation appear as the two most important actions undertaken by DMOs from all countries under study.

The examples of concrete sustainable actions are presented in Table 17.

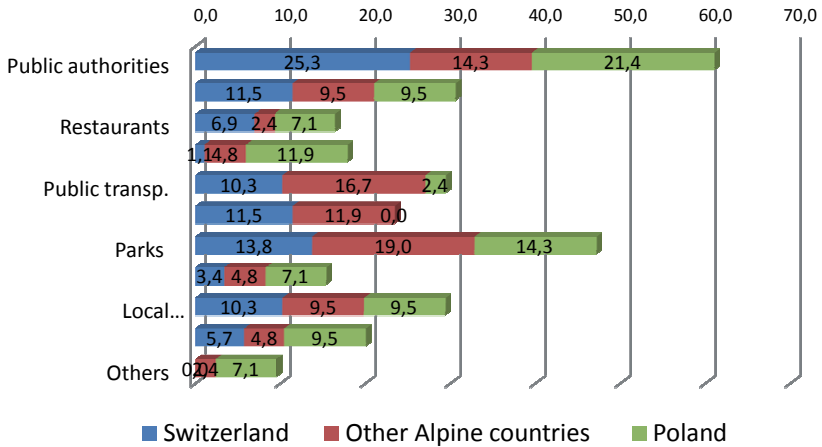
**Table 17. Examples of concrete environmental/social/economic actions – by country**

<b>Examples of actions</b>	<b>DMO name</b>
Energycity - ACCM eco- label concerning responsible use of energy and use of "renewable" energy source Eco-mobility	Crans-Montana Tourist Office/CH
First Swiss destination in Eco-mobility	Zermatt Tourist Office/CH
1.Promotion of local food and cuisine. 2. Promotion of ecological behavior among tourists - actions undertaken with Forestry. 3. Creation of information tourism system based on "green" branding in whole Roztocze region.	Roztocze Local Tourist Office /PL
Attractive environment-friendly packages such as guided city tours (on foot), promotion of E-Bike-Tours, BearPark, Mobility Ticket (public transport ticket for tourists) will be launched soon	Bern Tourism/CH
Fleet of electric bikes for rent / Use of an electric car for company transports / Sale of public transportation passes	Lago Maggiore Tourist Office/CH
Package "Escapade gourmande" / Sites naturels	Les Paccots Tourist Office /CH
Green "study trip" for journalists	Slovenian Tourist Board/SLO
Cleaning days, Formula bus + ski package, Promotional action of sensitization to eco-consumption, modernization of ski slopes, station reference Snow Carbon, plan of action concerning optimization of use of artificial snow. Certifications obtained: ISO 9001 ISO 14001. Signatory of the National Charter for Sustainable Development. Station has the label Family + and handicap persons. Campaign of sensitization	La Clusaz Tourist Office /F

addressed to local population to respect for natural resources (brochures + billboards). Creation of protected areas: ZNIEFF of type 1, two zones of Nature 2000 + four zones submitted in the program. Valorization of agriculture and local products.	
Energy city label ACCM eco- label concerning reasonable use of energy and use of "green" energy source	St-Moritz Tourist Office /CH
Maximization of profits coming from tourism to local population, promotion of local products, reduction of unemployment, conservation and protection of natural zones, conservation of local culture and traditions	Opole Tourist Office/PL
Sustainable products bundled together and communicated.	Lenzerheide Marketing und Support AG
Initiative for Eco-mobility in Geneva. Package hotel+ public transport for free	Geneva Tourism Office/CH
Our cable car company has obtained ISO 9001 and 14001	Les Carroz Tourist Office/F
DMO financial participation is the labeling of hotels and self-catering sector.	Union fribourgeoise du tourisme/CH
Railway offers concerning arrival / departure by train, tourists sensitization to behavior towards nature (parks, nature conservation, wildlife, etc.)	Kandertal Tourism/CH
Train is integrated in the cross-country skiing pass Lead in the Project alpmobil (electro-Cars)	Switzerland/anonymous respondent

As far as public and private partners involved in sustainable actions mentioned above, Swiss and Polish tourism organizations cooperate more in this area with public authorities than DMOs from Other Alpine Countries (see Figure 17.).

**Figure 17. Public and private partners involved in environmental/social/economic actions – by country (in %)**



For Alpine destinations (incl. Switzerland) collaboration with public transport and cable car companies and protected zones (i.e. natural parks) seems to be important. In addition, the involvement of local entrepreneurs in sustainable actions also constitutes an import issue for DMOs from all countries.

#### 4.6.3 Sustainability, marketing strategy and green products

The results show that there are more significant links concerning the introduction of suitability principles by DMOs under study into marketing strategy, than into their development strategies analyzed above. In fact, 75% of DMOs coming from Other Alpine Countries and almost 70% of Swiss tourism organizations are taking into consideration the importance of sustainability in marketing planning. As far as the types of DMOs are concerned, all national organizations and a high percentage of regional and local entities are implementing sustainable solutions in their marketing strategies (see Table 18.).

**Table 18. Implementation of sustainability in marketing strategy**

	<b>No</b>	<b>Yes</b>
Switzerland	30.2%	69.8%
Other Alpine countries (F,DE,A,IT,SLO)	25.0%	75.0%
Poland	58.3%	41.7%
<b>All countries</b>	34.3%	65.7%
National Tourism Office	0.0%	100.0%
Regional/cantonal tourism organization	20.0%	80.0%
Local tourism organization	43.2%	56.8%
<b>All DMOs</b>	34.3%	65.7%

An important element in the destination marketing mix is promotion and green product creation. Both of these elements play an important role in influencing consumer choice and endorsing destination branding.

In fact, currently green destinations and holidays are becoming trendy and are requested by different market segments, showing their willingness to go back to nature. That is why marketing strategy based on sustainability is important not only to preserve nature but also to attract new forms of demand called “21st century tourist”, “post-modern tourists” or in Alpine regions “4-L tourists” (Franch, Martini, Buffa, & Parisi, 2008) (see also paragraph 1.4).

In terms of “green” products, almost 60% of DMOs coming from Other Alpine Countries, 50% of Polish and 40% Swiss tourist organizations propose this kind of offer (see Table 19.).

**Table 19. Implementation of “green” products**

	<b>No</b>	<b>Yes</b>
Switzerland	62.8%	37.2%
Other Alpine countries (F,DE,A,IT,SLO)	41.7%	58.3%
Poland	53.8%	46.2%
<b>All countries</b>	57.4%	42.6%
National Tourism Office	0.0%	100.0%
Regional/cantonal tourism organization	50.0%	50.0%
Local tourism organization	64.4%	35.6%
<b>All DMOs</b>	57.4%	42.6%

In general, “green” products are commercialized in the form of packages. However, interviews conducted in September 2011 with Swiss and Polish DMOs show the differences between countries on this topic.

In fact, “green” tourism products in Poland are not sold in the form of “integrated” packages. Those products are rather sold as separate services which confirm the results of interviews conducted with Polish tourism organizations. The reason for this is the lack of sufficient cooperation between private and public partners.

Examples of “green” tourism products in Switzerland and in Poland are presented in Table 20.



**Table 20. Examples of “green” tourism products**

<b>Destination</b>	<b>Green Package name</b>	<b>Clients /market segment</b>	<b>Remarks</b>
Bern Tourism	Tour guide of Bern city by food Elektro-Bike/Herz Route		Marketing strategy based on ST is going to be elaborated
Fribourg Region	Charmey » Offer - Alpine Well-Being Estavayer-le-Lac » Nature Safari "Grande Cariçaille" Les Paccots » Oxygen package » Schwarzsee » Witch Family Package	Individual tourists/families	
Jura Région	Different green products organised « on request » by green incoming agency Jura escapade”	Groups/MICE clients	
Lago Maggiore	Tour guide of Locarno on e-bike Packages with public transport: Offer CFF-RailAway "Centovalli - Breath-taking panorama of the "100 valleys" region" Offer CFF-RailAway "Cardada - The Mountain of Locarno"	Individual tourists/small groups ( from 2 to 10 pax)	
Lenk-Simmental	Alpsculture packages sold by online platform : <a href="http://www.alpkultur.ch/">http://www.alpkultur.ch/</a>	Families with children	New products and platform launched 1 month ago
Les Paccots	Escapade gourmande	Families/individual tourists	
St Moritz	« Elektro-Bike Special package » Naturally Alpine « Mountain Magic” for	Individual tourists/small groups	

	Sportsmen and Bon Vivants		
Yverdon-les-Bains	“Green” meetings	MICE clients	
Kociewie Region / PL	“KOCIEWIE on four hooves”, “Bicycle tour” in Kociewie region -, „Kayaking in WIERZYCA” – Giew Castel –meeting with history	Individual tourists, small groups, families  MICE tourists	Products sold as individual services, not as packages

The results presented above could indicate that sustainability is a core goal more for tourism marketing (especially for product creation) and promotion than for destination management. An important issue is also to see the relationship between sustainable tourism and destination performance.

#### *4.6.4 Sustainable tourism and destination performance*

The respondents were asked to agree or disagree on a five point scale with four statements related to role of sustainability in present and future economic development of their destination.

Regarding the first and the second statements, managers from NTOs have a more global vision than CEOs from regional and local DMOs when it comes to the impact of sustainable strategy on the destination competitiveness and attraction of a new high value-added market segment (see Table 21.). The respondents are rather indifferent about the link between destination performance and sustainable development. However, managers from National Tourism Offices and local DMOs do agree regarding the relationship between return of investment and sustainable development.

**Table 21. The links concerning sustainable development strategy and the success factors of a destination - by type of DMO**

	<b>National Tourism Office</b>	<b>Regional DMOs</b>	<b>Local DMOs</b>	<b>Total</b>
The sustainable development strategy of our destination has strengthened our competitiveness in the global tourism market.	4.00	3.53	3.64	3.62
The implementation of a sustainable development strategy is an asset to attract a new high added-value market segment for our destination	4.33	3.72	3.76	3.78
The performance of tourism enterprises having implemented a sustainable development strategy is better than average according to our experience.	3.33	3.44	3.41	3.42
The return on investment of a sustainable development strategy will be realized on the medium and / or long term	4.33	3.94	4.03	4.02
<b>Total</b>	<b>4.00</b>	<b>3.66</b>	<b>3.71</b>	<b>3.71</b>

Evaluation of scale modalities: - (Not concerned) ; 1 (Strongly disagree); 2 (Disagree); 3 (Indifferent) ; 4 (Agree) ; 5 (Strongly agree)

The item concerning the importance of sustainability in reinforcing global competitiveness of a destination seems to be more important for Polish managers than for those coming from Switzerland and Other Alpine Countries (Table 22.).

**Table 22. The links concerning sustainable development strategy and the success factors of a destination - by country**

	Switzerland	Other Alpine countries (F,DE,A,IT,SL O)	Poland	Total
The sustainable development strategy of our destination has strengthened our competitiveness in the global tourism market.	3.52	3.75	3.88	3.62
The implementation of a sustainable development strategy is an asset to attract a new high added-value market segment for our destination	3.70	3.83	4.00	3.78
The performance of tourism enterprises having implemented a sustainable development strategy is better than average according to our experience.	3.28	3.67	3.75	3.42
The return on investment of a sustainable development strategy will be realized on the medium and / or long term	3.95	4.42	3.75	4.02
<b>Total</b>	<b>3.61</b>	<b>3.92</b>	<b>3.85</b>	<b>3.71</b>

Evaluation of scale modalities: - (Not concerned); 1 (Strongly disagree); 2 (Disagree); 3 (Indifferent); 4 (Agree); 5 (Strongly agree)

Polish respondents are also inclined to agree with their colleagues in the case of the second question concerning the link between sustainability and attracting high added-value market segment. The following question referred to the experiences of respondents concerning the impact of sustainable strategy on better economic performance of tourism enterprises. Polish respondents agree with this statement more frequently than managers from other analyzed countries. There was general agreement of all types of DMOs with the statement: “the return on investment of a

sustainable development strategy will be realized on the medium and / or long term perspective”.

The evaluations concerning the two last statements related with countries show little significance. For the question concerning the link between performance and sustainability p-value = 0.094 and for the statement concerning ROI p-value = 0.085.

However, the response to the research questions presented above does not give a definite answer to the research question no. 6, if sustainable development strategy constitutes currently a positive vector for destination performance. Sustainability is perceived rather as an essential factor for the future development of tourism destination under study.

To complete the issue of destination performance, the sample under study was compared with the list of BAK BASEL TOPINDEX. 29.1% of the sample destinations appear on this index (see Annex 3). The comparison between BAK and NO BAK destination of the sample shows that for almost 62 % of BAK destinations under study, sustainability is not actually an important vector to stimulate their performance (see Table 23). Therefore, the answer to the question asking if the most competitive DMOs in the ranking of BAK TOPINDEX 150 are also the most sustainable ones cannot be confirmed.

**Table 23. BAK BASEL TOPINDEX Destinations and their quest to sustainable strategy development**

	no involvement / activity in sustainable development	a sustainable development strategy exists, but it is not applied or is applied poorly	a sustainable development strategy exists and is implemented with success	Total
NO BAK	23.3%	41.9%	34.9%	100.0%
BAK DESTINATIONS	14.3%	47.6%	38.1%	100.0%
<b>Total</b>	20.3%	43.8%	35.9%	

Also previous research conducted on this topic by the team: Klimek, K., Scaglione M., Schegg R. and Matos R., did not find sufficient evidence of a link between sustainability and the destination performance indicators of BAK TOPINDEX (Klimek, Scaglione, Schegg & Matos, 2011). Of course, this does not mean that this link does not exist. Nevertheless, this fact should be acknowledged as a limit of conducted research.

#### IV. Conclusions, limits of this study and future research

Referring to the research questions presented in the first part of this study, the results determine the main tasks exercised by all DMOs under study. They are as follows:

- reception, information, animation
- tourism product creation
- marketing and sales
- marketing branding.

The most polyvalent ones, regarding the performed tasks, are Swiss DMOs, the biggest number of which can also be considered as “real” DMOs. Swiss tourism organizations are also bigger than those from Other Alpine Countries and from Poland regarding the number of staff. Every third Swiss organization employs more than 20 staff members. On the other hand, the least developed in this area are Polish Tourist Organizations. More than 60% of them can be considered as “partial” DMOs. Those entities are also the smallest in the number of employees. It should be added here that Swiss and Other Alpine Countries DMOs are mostly private associations. Regarding Poland, local and regional tourist organizations are mostly financed by local authorities, which is why their strategy and global vision of development remain under the influence of politicians. This situation affects all actions undertaken by those organizations and is not conducive to the development of public-private partnership in Poland, which, as was mentioned before, is implemented very poorly or is not implemented at all.

Another important issue concerns the comparison of the level of cooperation between Alpine Arcs and Polish DMOs and their stakeholders. Swiss and Other Alpine Countries organizations cooperate to a greater extent with their partners regarding product development, destination marketing and promotion & branding

of the destination than is the case of Polish entities. The results of the survey and, especially the interviews, show that Polish local and regional tourism organizations are not at all involved in the process of integrated tourism products (packages) creation based on PPP principles. Their main role consists rather in promotion of tourist attractions and local stakeholders' products.

The questionnaire used in this study allowed also the measurement of the level of satisfaction concerning cooperation between DMOs and their stakeholders. Thus, tourism organizations from all countries under study are most satisfied with cooperation with public partners. All DMOs' managers are, in general, satisfied and almost satisfied from collaboration with parks, attraction sector and local entrepreneurs. Swiss respondents express the highest level of satisfaction concerning cooperation with cable car companies among all organizations under study.

The managers of all DMOs perceive unique natural resources as the most important success factor for current development of their destinations. However, only 3.4% of them think that implementation of a sustainable development strategy could strengthen the present destination's competitiveness. Moreover, on average only every third DMO in the Alpine Arc and in Poland currently has a strategy based on sustainability which is implemented with success. In most DMOs under study (64.1%) this strategy exists but is not applied or applied poorly. Nevertheless, sustainable management is becoming a key issue for future success development of all DMOs under study.

The results also show the relevant trends concerning the growing importance of sustainability involvement in marketing strategies. Almost 70% of Swiss, 75% of Other Alpine Countries and more than 40% of Polish DMOs under study are implementing sustainable development in their marketing planning. It especially applies to development of "green" products and promotion of sustainability via web



pages. Furthermore, many DMOs from all countries under study undertake concrete environmental, social or economic actions with partners to strengthen their striving for sustainable development.

However, this research fails to find sufficient evidence of a relation between sustainability and the destination performance. Also, destinations listed in BAK BASEL TOPINDEX are generally not more involved in sustainable development strategy than other DMOs under study. This fact can be regarded as a limit of this study. Another limitation of this research concerns the overrepresentation of local DMOs which constitute more than half of the entities under study.

Nevertheless, the present study shows relevant trends in DMOs development in six Alpine countries and in Poland, as well as the importance of sustainability.

Switzerland can be considered as the cradle of modern tourism, in which innovative solutions in tourism management were developed and introduced already 15 years ago. Swiss DMOs seem to be an ideal starting and reference point for Polish tourism organizations as regards to implementation of integrated management based on public-private partnership.

However, the result of the present study and previous observations of the Polish tourism market suggest that currently there is not sufficient teamwork and constructive cooperation that would integrate all stakeholders – a basic concept of the DMO approach. Currently, the main motivation for cooperation between particular entities is the high (external) pressure from competition. Therefore, successful implementation of integrated management will not be possible without the change of mentality of public and private stakeholders in terms of the advantage of common cooperation.

Apart from this, the undertaken research subject needs to be studied in-depth on a larger scale. That could allow the creation of the features of a universal DMO model adaptable to other countries.

Moreover, the results indicate that many destinations have problems creating and commercializing appropriate tourism products adapted to the new tourism market needs in an ever evolving and dynamic online market place. The critical analysis of (online) distribution strategies of DMOs on an international level would be an interesting option for an extension of this research. Thus, it would help to get more information in those key areas to strengthen the competitiveness of European tourism destinations.

# ANNEX 1 – Questionnaire (English version)



## The role of Destination Management Organisations in (sustainable) management of tourism destination

### Basic informations

1. What is the type of your organisation?

- National Tourism Office   
  Regional/cantonal tourism organisation (regional DMO)   
  Local Destination tourism organisation (local DMO)

2. If "Other", please specify.

3. What are the main tasks of your organization?:

- reception, information, animation   
  creation and management of tourism products   
  marketing / sales   
  marketing branding   
  development and implementation of tourism policy   
  other

4. If "Other", please specify.

6. Number of employees in your organisation (full time equivalent):

- > 5   
  5-10   
  11-20   
  > 20

7. Indicate the number of overnight stays in hotels of your destination in 2010:

- < 200'000   
  200'000 to 500'000   
  500'000 to 1'000'000   
  1'000'000 to 3'000'000   
  3'000'000 to 5'000'000   
  > 5'000'000

8. What was the average growth rate of overnights in hotels between 2005 and 2010?

- < -10%   
  -10% to - 5%   
  -5% to -1%   
  -1% to +1%   
  +1% to +5%   
  +5% to 10%   
  >+10%

9. Indicate the number of overnights in the self-catering sector (including second home properties) in your destination in 2010:

- < 200'000   
  200'000 to 500'000   
  500'000 to 1'000'000   
  1'000'000 to 3'000'000   
  3'000'000 to 5'000'000   
  > 5'000'000

10. What was the average growth rate of overnights in the self-catering sector in your destination between 2005 and 2010?

- < -10%   
  -10% to - 5%   
  -5% to -1%   
  -1% to +1%   
  +1% to +5%   
  +5% to 10%   
  >+10%

### Public-private partnership

11. Identify partners who collaborate with you in operational activities resp. in the management of your destination:

- |   |   |
|---|---|
| <input type="checkbox"/> Public authorities                         | <input type="checkbox"/> Hospitality and self-catering sector                       |
| <input type="checkbox"/> Restaurants                                | <input type="checkbox"/> Tour operators & travel agencies                           |
| <input type="checkbox"/> Public transport                           | <input type="checkbox"/> Cableway companies   |
| <input type="checkbox"/> Parks (natural, national, protected areas) | <input type="checkbox"/> Attractions  |
| <input type="checkbox"/> Local entrepreneurs                        | <input type="checkbox"/> Local associations (NGO, environmental organisations etc.) |
| <input type="checkbox"/> Others                                     |   |

12. What were/are the areas of cooperation with your partners ?

- |  |   |
|--|---|
| <input type="checkbox"/> strategic planning  | <input type="checkbox"/> destination marketing  |
| <input type="checkbox"/> product development | <input type="checkbox"/> promotion & branding (USP)   |
| <input type="checkbox"/> quality management  | <input type="checkbox"/> co-financing of common actions/projects (marketing, infrastructure, etc) |
| <input type="checkbox"/> other               |   |

13. If "Other", please specify

## The role of Destination Management Organisations in (sustainable) management of tourism destination

**What is your level of satisfaction concerning the cooperation with the following partners?**

	not concerned	not at all satisfied	unsatisfied	satisfied	fairly satisfied	very satisfied
14. Public authorities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Hospitality and self-catering sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Tour operators & travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Cableway companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Public transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Parks (natural, national, protected areas)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Local entrepreneurs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. Local associations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Success factors of the destination

**24. What are currently the three most important success factors for your destination?**

<input type="checkbox"/> the presence of a strong hotel sector	<input type="checkbox"/> the presence of a strong cableway company
<input type="checkbox"/> support of the local population for the tourism industry	<input type="checkbox"/> unique natural resources
<input type="checkbox"/> the quality of the tourism offer in summer	<input type="checkbox"/> the quality of the tourism offer in winter
<input type="checkbox"/> the highly qualified staff in the tourism sector	<input type="checkbox"/> good cooperation between tourism stakeholders (public, private)
<input type="checkbox"/> innovation capacity of our businesses	<input type="checkbox"/> favorable political framework conditions
<input type="checkbox"/> favorable economic framework conditions	<input type="checkbox"/> implementation of sustainable development strategy
<input type="checkbox"/> our work in tourism marketing	<input type="checkbox"/> our work related to the coordination and development of tourism products
<input type="checkbox"/> our work with the clients (information, entertainment program)	

**25. What will be the three most important success factors in your destination in 2020 (excluding those already mentioned in the previous question)?**

<input type="checkbox"/> the presence of a strong hotel sector	<input type="checkbox"/> the presence of a strong cableway company
<input type="checkbox"/> support of the local population for the tourism industry	<input type="checkbox"/> unique natural resources
<input type="checkbox"/> the quality of the tourism offer in summer	<input type="checkbox"/> the quality of the tourism offer in winter
<input type="checkbox"/> the highly qualified staff in the tourism sector	<input type="checkbox"/> good cooperation between tourism stakeholders (public, private)
<input type="checkbox"/> innovation capacity of our businesses	<input type="checkbox"/> favorable political framework conditions
<input type="checkbox"/> favorable economic framework conditions	<input type="checkbox"/> implementation of sustainable development strategy
<input type="checkbox"/> our work in tourism marketing	<input type="checkbox"/> our work related to the coordination and development of tourism products
<input type="checkbox"/> our work with the clients (information, entertainment program)	

**26. What is the implication of your organization in the field of sustainable development?**

no involvement / activity in sustainable development     
  a sustainable development strategy exists, but it is not or poorly applied     
  a sustainable development strategy exists and is implemented with success

## Sustainable tourism and public-private partnership

*Sustainable development is a concept with the following goal: "Meets the needs of the present without compromising the ability of future generations to meet their own needs". It is based on three main pillars: the environment, the society and the economy.*

<b>Does your organization conduct concret environmental/social/economic actions?</b>	
<b>26. Environment</b>	
<input type="checkbox"/> protection of natural areas	<input type="checkbox"/> better management of natural resources (air, water, soil)
<input type="checkbox"/> awareness-raising for citizens / tourists related to energy conservation	<input type="checkbox"/> introduction of clean, public transport offers
<input type="checkbox"/> promotion of carpooling	<input type="checkbox"/> introduction to quality standards (eg. ISO 14000)
<b>28. Society</b>	
<input type="checkbox"/> improvement of quality of life and well-being of the local population	<input type="checkbox"/> increasing solidarity and social equity
<input type="checkbox"/> enhancement and preservation of cultural and local traditions	<input type="checkbox"/> awareness-raising among tourists to the principles of sustainable development
<input type="checkbox"/> awareness-raising among stakeholders and staff in tourism industry to the principles of sustainable development	<input type="checkbox"/> communication of sustainable development principles
<b>29. Economy</b>	
<input type="checkbox"/> maximization of profit in tourism for local community	<input type="checkbox"/> maintenance of local economy and employment
<input type="checkbox"/> promotion of local products	<input type="checkbox"/> eco-labeling for companies and promotion of local products
<input type="checkbox"/> establishing a "green" destination brand	<input type="checkbox"/> others environmental / social / economic actions
<b>30. If " others environmental / social / economic actions ", please specify.</b>	
<b>31. Does your tourism destination have an eco-label?</b>	
<input type="radio"/> No	<input type="radio"/> Yes
<b>32. Does your marketing strategy focus on the development of sustainable tourism?</b>	
<input type="radio"/> No	<input type="radio"/> Yes
<b>33. Have you already developed "green" products / packages ?</b>	
<input type="radio"/> No	<input type="radio"/> Yes
<b>34. Please indicate the partners who coloborate with you in sustainable development projects in your destination:</b>	
<input type="checkbox"/> Public authorities	<input type="checkbox"/> Hospitality and self-catering sector
<input type="checkbox"/> Restaurants	<input type="checkbox"/> Tour operators & travel agencies
<input type="checkbox"/> Public transport	<input type="checkbox"/> Cableway companies
<input type="checkbox"/> Parks (natural, national, protected areas)	<input type="checkbox"/> Attractions
<input type="checkbox"/> Local entrepreneurs	<input type="checkbox"/> Local associations (NGO, environmental organisations etc.)
<input type="checkbox"/> Others	
<b>35. What "best practice" actions / initiatives have you realised with your partners in the field of sustainable development over the last three years?</b>	

### Sustainable tourism and destination performance

What is your opinion concerning the links between a sustainable development strategy and the success of a destination?

	Not concerned	Strongly disagree	Disagree	Indifferent	Agree	Strongly agree
36. The sustainable development strategy of our destination has strengthened our competitiveness in the global tourism market.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
37. The implementation of a sustainable development strategy is an asset to attract a new high added-value market segment for our destination.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
38. The performance of tourism enterprises having implemented a sustainable development strategy is better than average according to our experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
39. The return on investment of a sustainable development strategy will be realised on the medium and / or long term	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### General information

40. Name of your organisation

41. City

43. Country

Switzerland    France    Germany    Austria    Italy    Slovenia

45. Your name and e-mail address to send the summary of the study

46. Key (only for on-line version)

47. Date of survey

## Annex II - List of destinations under study

<b>DMO type</b>	<b>DMO name</b>	<b>Country</b>
1. National Tourism Office	Switzerland Tourism	Switzerland
2. National Tourism Office	Deutschland National Tourism Office	Germany
3. National Tourism Office	Slovenian Tourist Board	Slovenia
4. Regional DMO	Chablais Tourisme SA	Switzerland
5. Regional DMO	Seiser Alm Marketing	Italy
6. Regional DMO	Opolska Regionalna Organizacja Turystyczna	Poland
7. Regional DMO		Switzerland
8. Regional DMO	Kujawsko-Pomorska Organizacja Turystyczna	Poland
9. Regional DMO	Lenk Simmental Tourismus AG	Switzerland
10. Regional DMO	Tourismus Biel Seeland	Switzerland
11. Regional DMO	Alpenregion Bludenz Tourismus GmbH	Austria
12. Regional DMO	Union fribourgeoise du tourisme	Switzerland
13. Regional DMO	Bern Tourism	Switzerland
14. Regional DMO	Luzern Tourismus AG	Switzerland
15. Regional DMO	Lubuska Regionalna Organizacja Turystyczna	Poland
16. Regional DMO	Yverdon-les-Bains	Switzerland

	Région Jura/Lac (ADNV)	
17.Regional DMO	Office du Tourisme les Paccots	Switzerland
18.Regional DMO	Office de Tourisme de La Clusaz	France
19.Regional DMO	Śląska Organizacja Turystyczna	Poland
20.Regional DMO	Jura Tourisme	Switzerland
21.Regional DMO	Obergoms Tourismus	Switzerland
22.Regional DMO	Warmińsko- Mazurska Regionalna Organizacja Turystyczna	Poland
23.Regional DMO		Switzerland
24.Local DMO	Diablerets- Tourisme	Switzerland
25.Local DMO	Office de tourisme Les Carroz	France
26.Local DMO		Switzerland
27.Local DMO	Savognin Tourismus im Surses	Switzerland
28.Local DMO	Geneve Tourisme & Congres	Switzerland
29.Local DMO		Switzerland
30.Local DMO		Switzerland
31.Local DMO	Touristische Unternehmung Grächen	Switzerland
32.Local DMO		Switzerland
33.Local DMO	St-Cergue Tourisme	Switzerland
34.Local DMO		Switzerland
35.Local DMO		Switzerland
36.Local DMO	Development agency Kozjansko - Tourist information center	Slovenia



37.Local DMO	TIC Pivka	Slovenia
38.Local DMO		Switzerland
39.Local DMO	MARTIGNY Tourism	Switzerland
40.Local DMO	Office de Tourisme de Sion	Switzerland
41.Local DMO		Switzerland
42.Local DMO	Katschberg Rennweg	Austria
43.Local DMO	LOT "Jantarowe Wybrzeże" w Stegnie	Poland
44.Local DMO	Stowarzyszenie Turystyczne Ziemi Wschowskiej	Poland
45.Local DMO		Switzerland
46.Local DMO	Toggenburg Tourism	Switzerland
47.Local DMO		Switzerland
48.Local DMO		Switzerland
49.Local DMO	Lokalna Organizacja Turystyczna MARINA	Poland
50.Local DMO	Lokalna Organizacja Turystyczna "Zamość i Roztocze"	Poland
51.Local DMO	Stowarzyszenie Rozwoju Północnych Kaszub NORDA-LOT	Poland
52.Local DMO	Lokalna Organizacja Turystyczna KOCIEWIE	Switzerland
53.Local DMO		Switzerland
54.Local DMO	Inowrocławska Lokalna Organizacja	Poland

	Turystyczna	
55.Local DMO	Lokalna Organizacja Turystyczna Pojezierza Iławskiego i Dorzecza Drwęcy	Poland
56.Local DMO	Lokalna Organizacja Turystyczna "Roztocze"	Poland
57.Local DMO	Lenzerheide Marketing und Support AG	Switzerland
58.Local DMO		Switzerland
59.Local DMO	Val Gardena Marketing	Italy
60.Local DMO	Lago Maggiore Tourist Office	Switzerland
61.Local DMO	Kandertal Tourism	Switzerland
62.Local DMO	Murten Tourismus	Switzerland
63.Local DMO	Leysin Tourisme	Switzerland
64.Local DMO	Crans-Monta Tourisme	Switzerland
65.Local DMO	Tourist Board Plan de Corones	Italy
66.Local DMO	Leukerbad Tourism	Switzerland
67.Local DMO	St. Moritz Tourist Board	Switzerland
68.Local DMO	Destination Davos Klosters	Switzerland
69.Local DMO	Saas-Fee/Saastal Tourismus	Switzerland
70.Local DMO		Italy
71.Local DMO	Zermatt Tourism	Switzerland
72.Local DMO		Switzerland

## Annex III BAK Destinations

<b>DMO name</b>	<b>BAK BASEL TOP INDEX RATE</b>	<b>Country</b>
1. Alpenregion Bludenz Tourismus GmbH	3.80	Austria
2. Chablais Tourisme SA	2.80	Switzerland
3. Crans-Monta a Tourisme	2.90	Switzerland
4. Destination Davos Klosters	4.00	Switzerland
5. Kandertal Tourism	3.30	Switzerland
6. Katschberg Rennweg	4.80	Austria
7. Lago Maggiore Tourist Office	3.50	Switzerland
8. Lenk Simmental Tourismus AG	3.70	Switzerland
9. Lenzerheide Marketing und Support AG	4.00	Switzerland
10. Leukerbad Tourism	4.10	Switzerland
11. Leysin Tourisme	3.20	Switzerland
12. Luzern Tourismus AG	4.30	Switzerland
13. Office de Tourisme de La Clusaz	3.50	France
14. Office de Tourisme les Carroz	2.40	France
15. Saas-Fee/Saastal Tourismus	3.70	Switzerland
16. Seiser Alm Marketing	4.30	Italy
17. St. Moritz Tourist Board	4.00	Switzerland
18. Toggenburg	2.70	Switzerland

Tourism		
19. Tourist Board Plan de Corones	3.40	Italy
20. Val Gardena Marketing	4.20	Italy
21. Zermatt Tourism	4.50	Switzerland

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