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# GUIDE TO DESTINATION MANAGEMENT PLANNING PILOT PROGRAMME FOR GREEK DESTINATIONS



European Bank for Reconstruction  
and Development (EBRD) in cooperation  
with The Ministry of Tourism and the  
Hotel Association of Chania Prefecture

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INTRODUCTION

**DESTINATION MANAGEMENT  
PLANNING WORKSHOP**

# Key Project Partners



**European Bank**  
for Reconstruction and Development



HELLENIC REPUBLIC  
**MINISTRY OF TOURISM**

TEAM

YELLOW RAILROAD

TOPOSOPHY

CHAMBER OF  
DODECANESE

CHAMBER OF  
CYCLADES

**SETE**

## Milestones

Desk research	<b>MAY</b>
Main consultation	<b>JUNE</b>
Surveys of industry, consumers and community	<b>JULY - AUGUST</b>
Interviews with key stakeholders and experts	<b>JULY - AUGUST</b>
Strategy Discussion Papers	<b>JULY - AUGUST</b>
Draft Destination Management Plans & DM Guide	<b>SEPTEMBER</b>
Presentations to stakeholders + Final Report	<b>OCTOBER</b>
Dissemination events (Athens, Corfu and Chania)	<b>OCTOBER</b>
Project completion	<b>by 31 OCTOBER</b>

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INTRODUCTION

**TODAY'S AGENDA**

**PART 1:** DMP DEVELOPMENT – ROLE, VALUE,  
STRUCTURE, METHODOLOGY

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**PART 2:** INTERACTIVE DISCUSSION OF  
'KEY ISSUES'

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## INTRO TODAY – AGENDA

**A**

Role and value  
of a Destination  
Management  
Plan (DMP)

**B**

Key  
considerations  
in preparing a  
DMP

**C**

Main steps in  
developing a  
DMP

**D**

DMP framework

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**E**

Selection of  
issues for  
discussion

**F**

Key issues for  
DMP  
development –  
in groups

**G**

Feedback and  
discussion -  
plenary

**H**

Conclusions  
and Q & A

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A

DESTINATION MANAGEMENT PLAN DEVELOPMENT

**ROLE AND VALUE  
OF DESTINATION  
MANAGEMENT PLANNING**



## Context of Destination Management Planning

- ✓ Global tourism growth
- ✓ Major industry and employer on Crete
- ✓ Sustainability challenge
- ✓ Increasing focus on destination management
- ✓ National policies on attracting new, higher yield markets
- ✓ Thomas Cook collapse drives market restructuring
- ✓ Opportunity for Cretan residents to decide how tourism should contribute to their future: economy, social life, environmental conservation.

## Definition: Destination Management Plan

"A Destination Management Plan (DMP) is a **shared statement of intent** to **manage a destination** over a stated period of time, articulating the **roles** of the different stakeholders and identifying clear **actions** that they will take and the apportionment of **resources**."

This should cover "**all the aspects of a destination** that contribute to a visitor's experience, taking account of the needs of **visitors, local residents, businesses and the environment**."

## DMP Approach

### 4 QUESTIONS

1. Where is your destination in tourism now? **SITUATION ANALYSIS**

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2. Where does your destination want its tourism to be in 2030?  
**THE VISION**

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3. How does your destination get there?  
**THE STRATEGY & ACTION PLAN**

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4. How will we measure success?  
**MONITORING**

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## DMP Approach

### 4 CORE PRINCIPLES

1. **Targeting** those **visitors who will provide the greatest benefit** to the destination, in terms of spend, length of stay, season of visit, propensity to travel beyond the 'honeypots', and, most importantly, their (responsible) behaviour in the destination.

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2. **Developing** the destination, its infrastructure and tourism products and experiences, so that it appeals to those **visitors who will provide the greatest benefit** to the destination.

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3. Identifying and managing any potentially **negative impacts** of tourism before they damage the place or undermine community cohesion.

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4. Securing **residents' understanding** of tourism as a driver of the local economy, social cohesion, and environmental conservation, so that they welcome visitors and commit to tourism as an important and positive contributor to their daily lives.

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**B**


DESTINATION MANAGEMENT PLAN DEVELOPMENT

**KEY CONSIDERATIONS IN  
PREPARING A DMP**

## Basic Ingredients


 **Stakeholder participation and buy-in to process**

 **Evidence base: research, stakeholder consultation, insights from elsewhere**

 **Practical, action-oriented focus**

 **Governance and funding**

 **Stakeholder commitment to implementation**

 **'Live plan' – monitored and updated**

## Desired Results

✓ **10-year plan:  
aim, vision,  
clear objectives  
+ action plan**

✓ **Economically,  
socio-culturally,  
and  
environmentally  
sustainable**

✓ **Distinctive brand  
and competitive  
positioning**

✓ **Market  
segments  
prioritised**

✓ **Appropriate visitor  
products and  
experiences developed**

✓ **Opportunities  
and challenges  
identified**

## Desired Results

 **Infrastructure improvements and negative impacts addressed**

 **Implementation body + governance in place**

 **Stakeholder commitment: political, businesses and communities**



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C

DESTINATION MANAGEMENT PLAN DEVELOPMENT

## MAIN STEPS IN DEVELOPING A DMP

- **WHERE ARE YOU NOW?**

## Briefing and Inception Meeting

### Briefing

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- Context
- Purpose
- Output and main deliverables
- Timetable

### Inception Meeting

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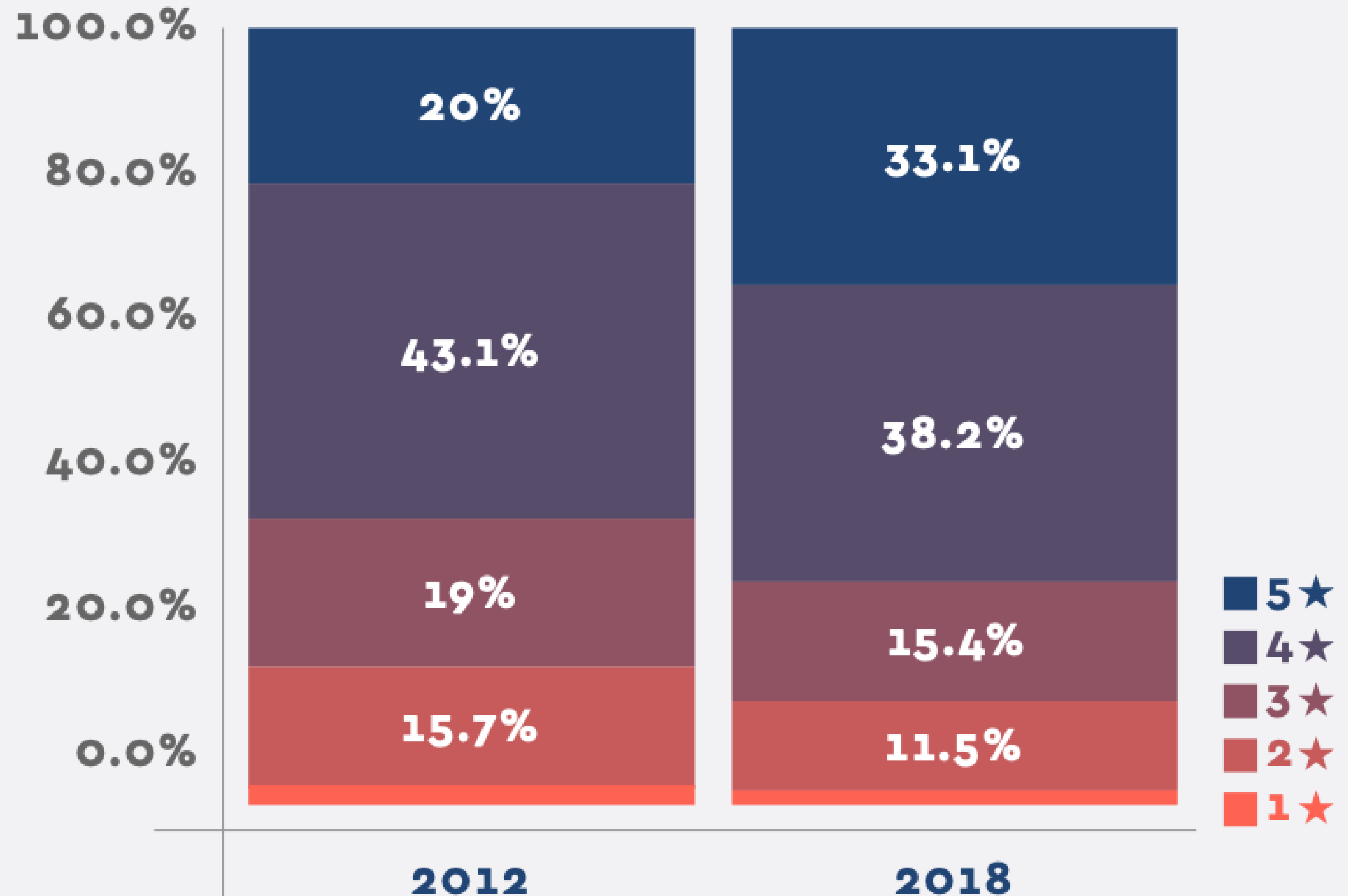
- Expectations: review brief
- Issues
- Process
- Stakeholders
- Existing reports /strategies
- Milestones and reporting
- Resources

## Desk research

- ✓ **Analysis of existing research and strategic documents at local, regional & national levels**
- ✓ **PESTEL context**  
political, economic, social, technological environmental & legal
- ✓ **Competitor analysis and competitive positioning**
- ✓ **Stakeholder mapping**
- ✓ **Initial market analysis**
- ✓ **Initial visitor perceptions analysis**
- ✓ **Initial Product / Experiences / Resources Assessment**  
**Destination Audit**

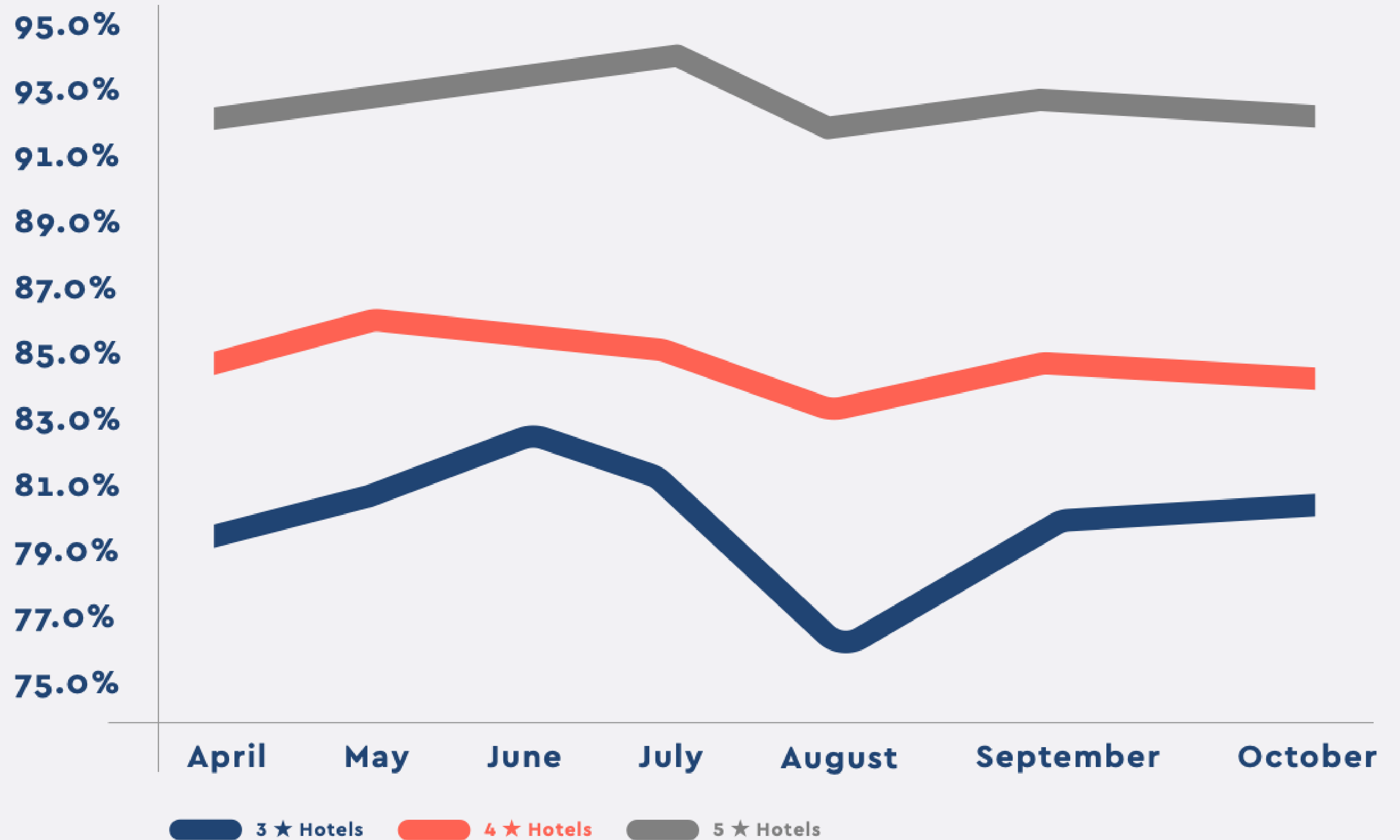
## Situation Analysis: HOTEL CAPACITY EVOLUTION - RHODES

More than 2 in 3 hotel  
beds belong to 4\* & 5\*  
star hotels.



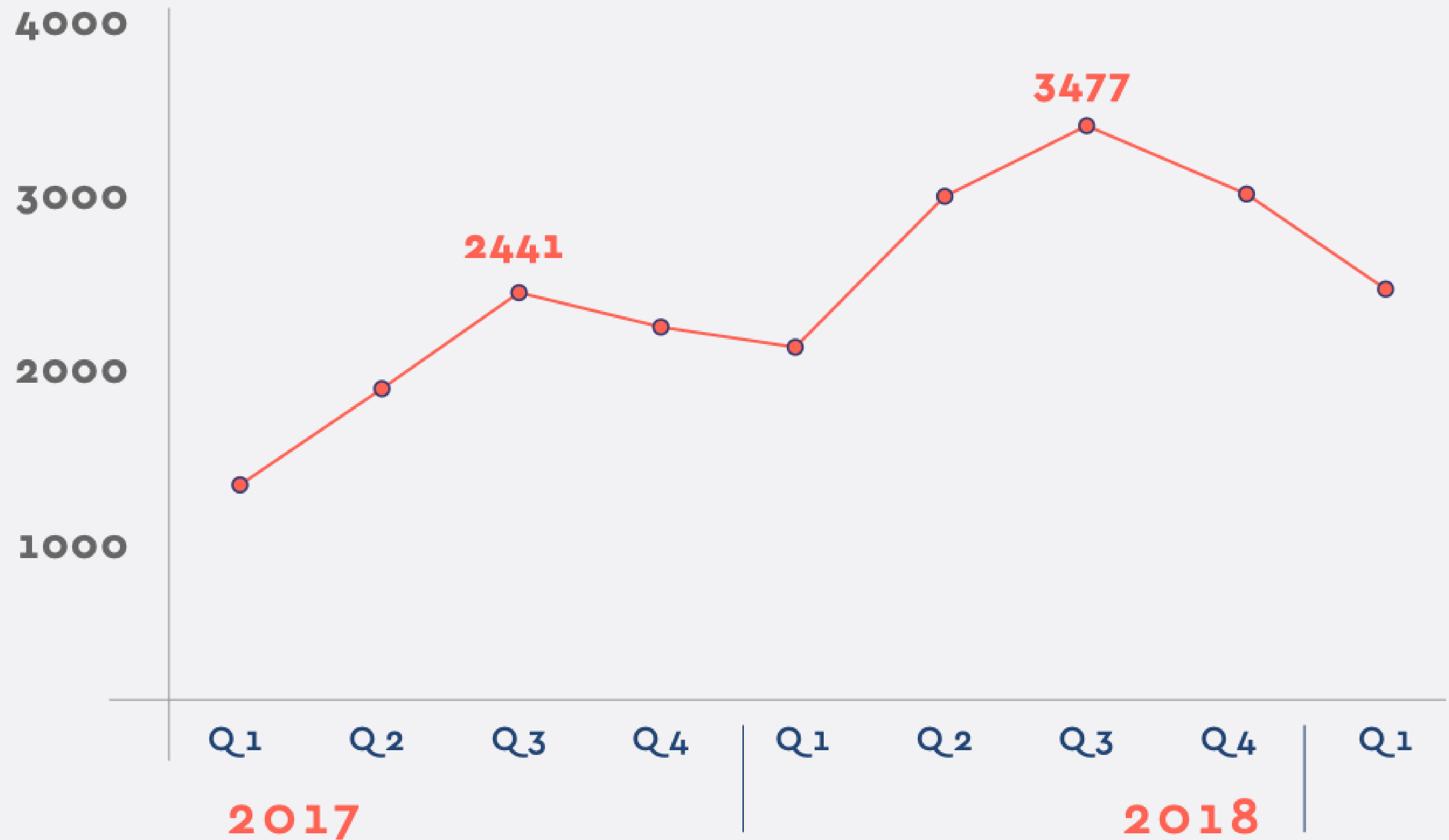
## Situation Analysis: GRI SCORES FOR 3\*, 4\* & 5\* HOTELS IN RHODES (2018)

Average scores higher than 80% in all cases.



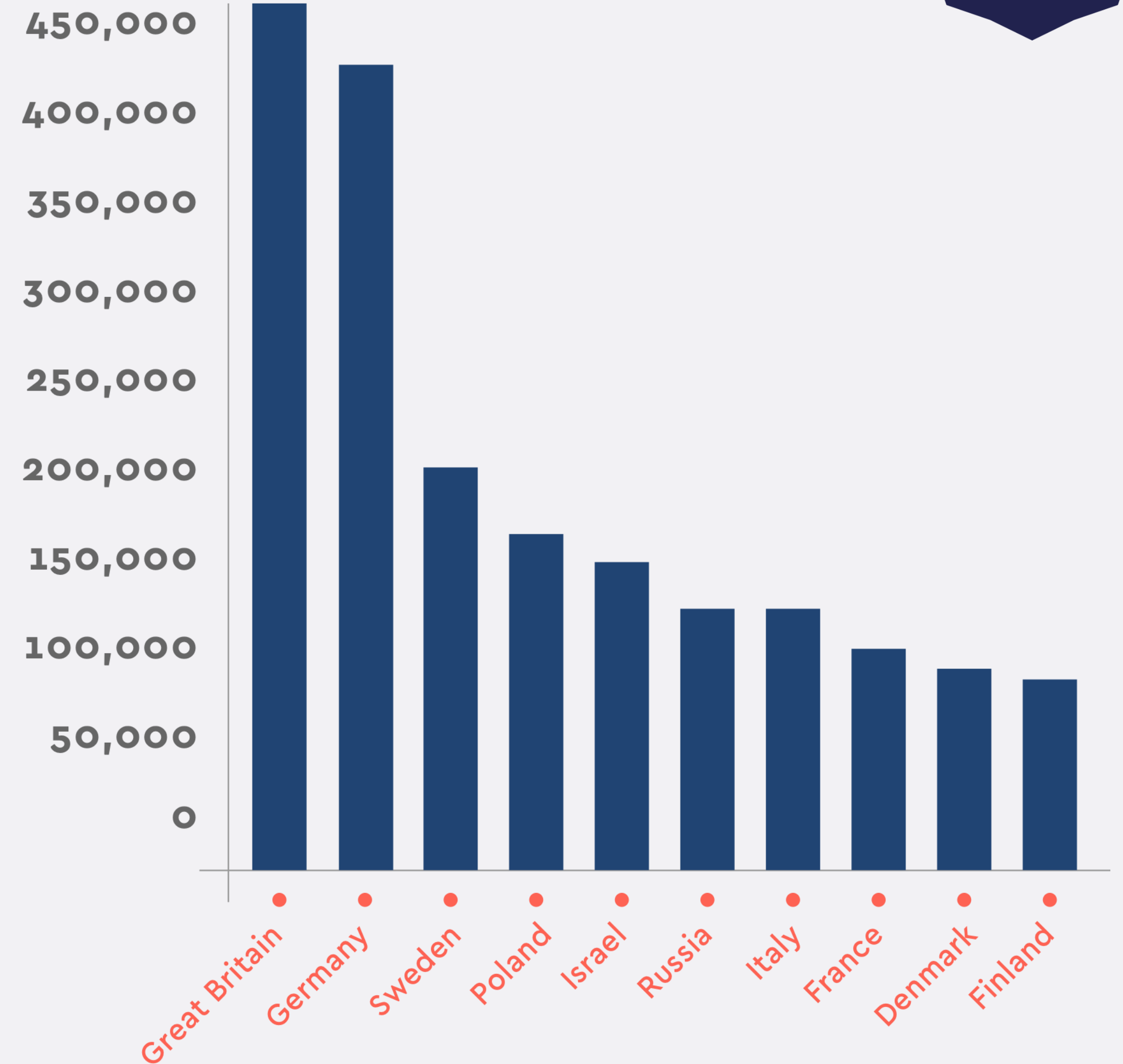
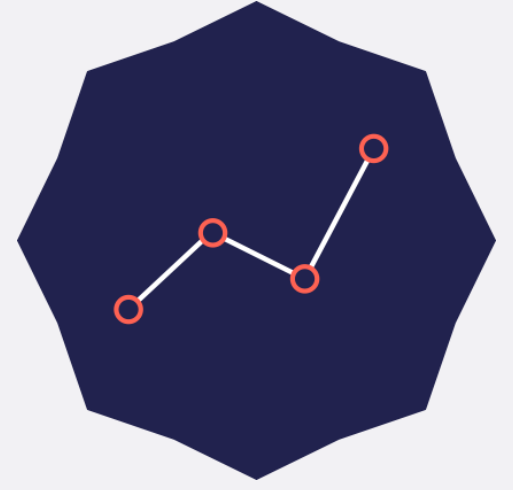
## Situation Analysis: SHORT-TERM RENTALS - RHODES

In Q3 2018 there were 1,000+ additional listings compared to Q3 2017



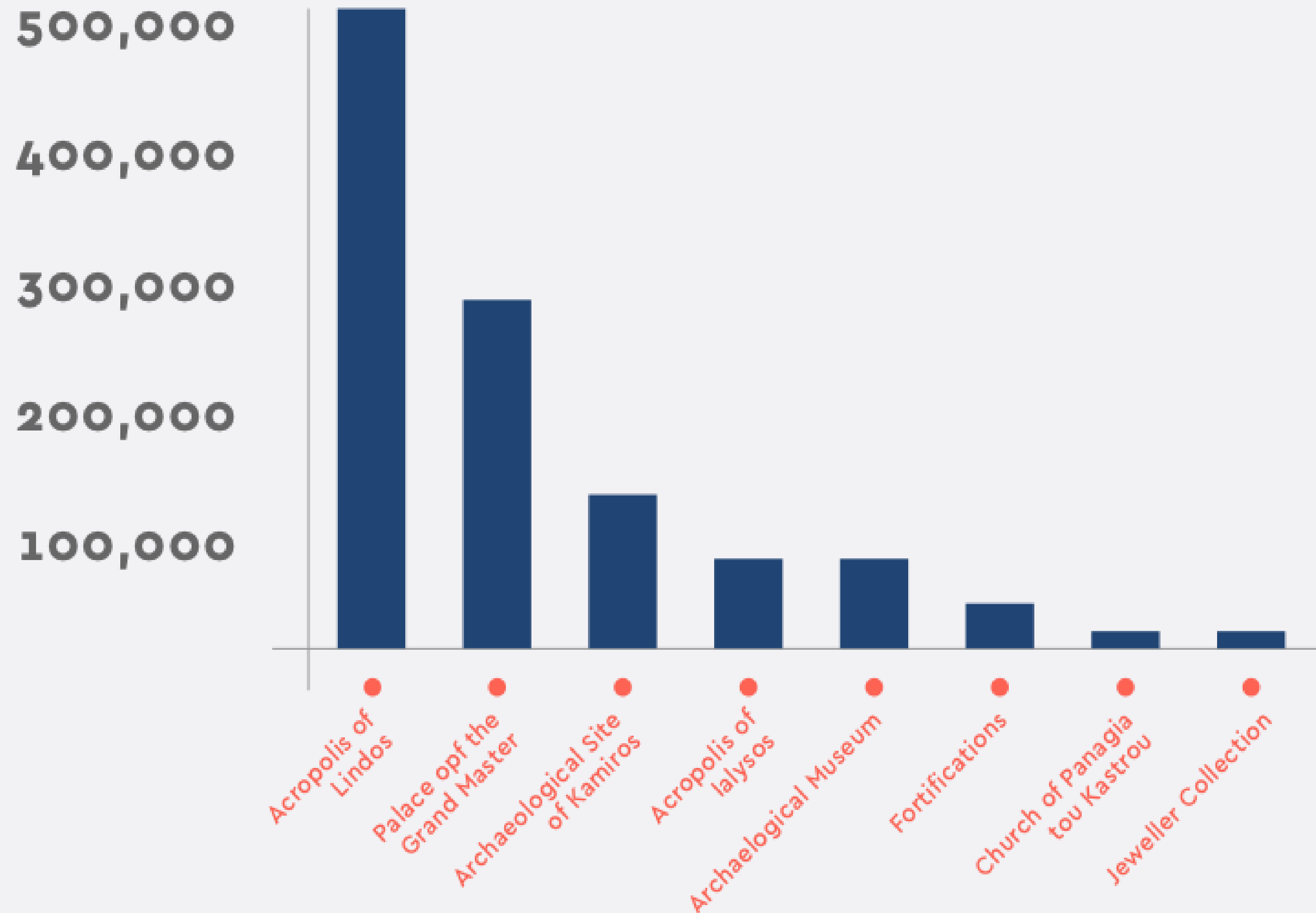
# Situation Analysis: MARKETS – RHODES

International Arrivals at  
Rhodes International  
Airport (2018)



## Situation Analysis: ATTRACTIONS – RHODES

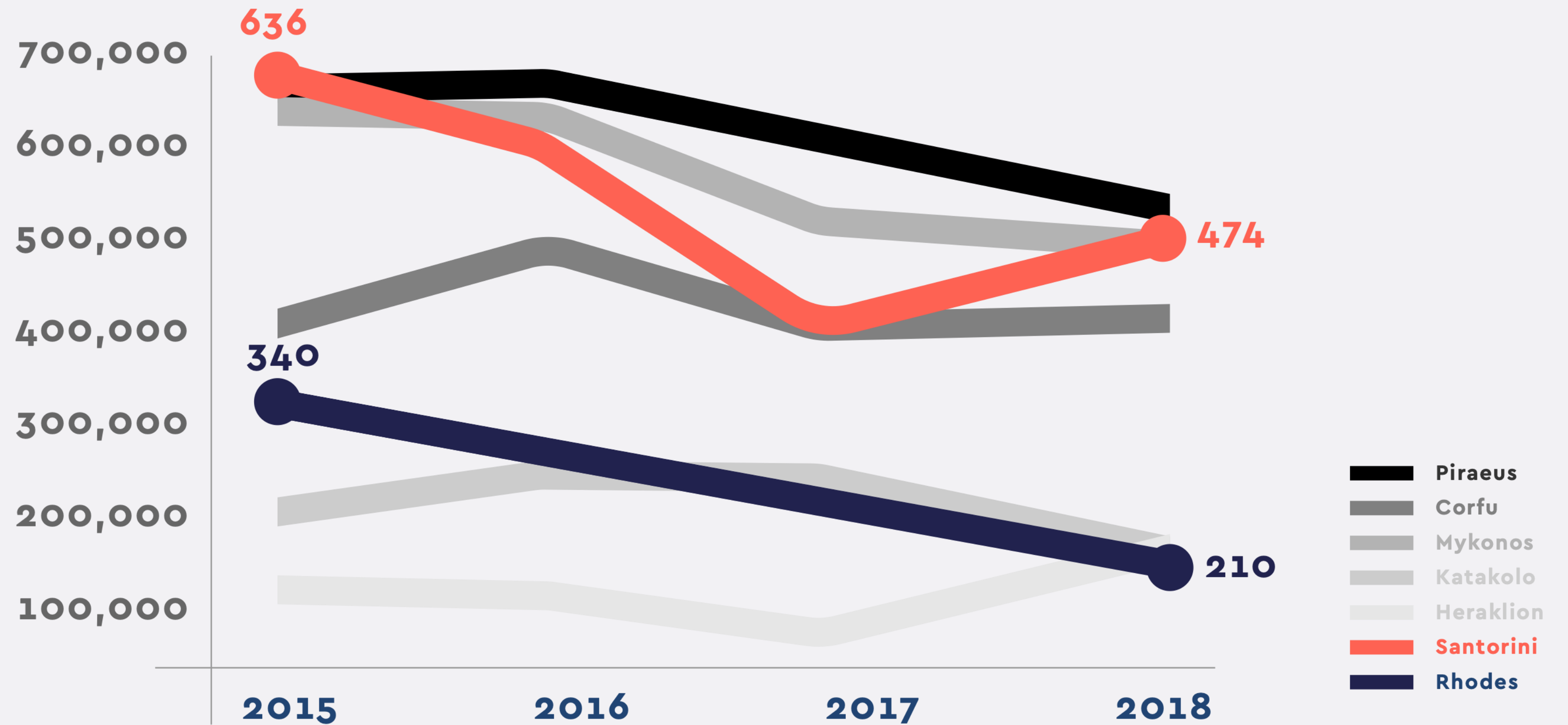
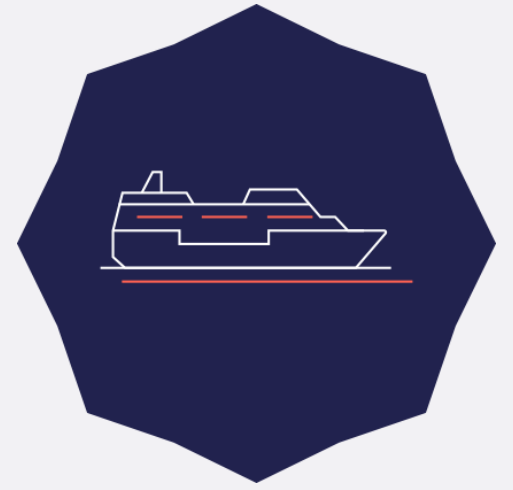
Admissions at  
Archaeological Sites  
and Museums in  
Rhodes, 2018





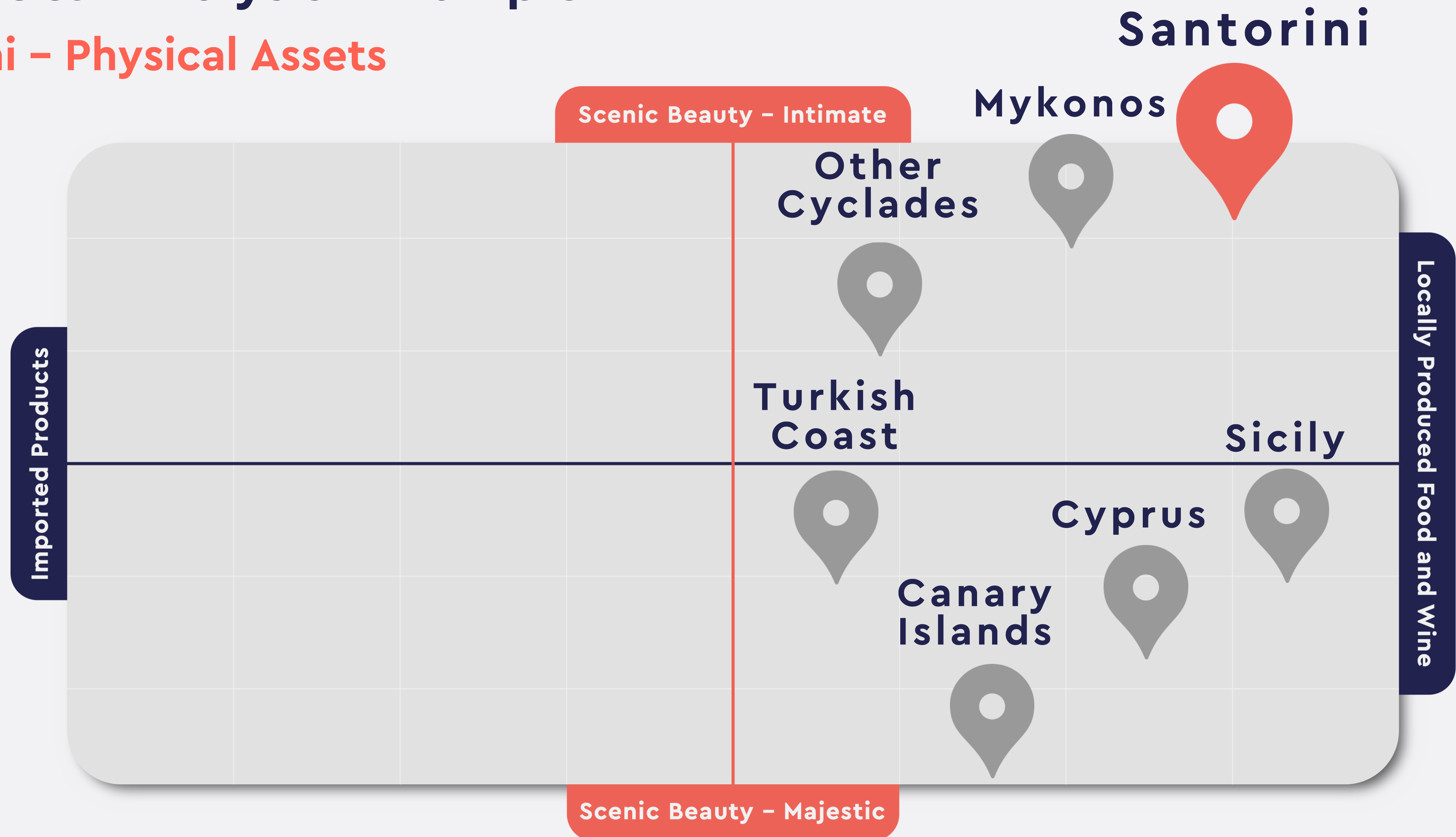
# Situation Analysis:

## CRUISE SHIP VISITS IN GREECE (2015-2018)



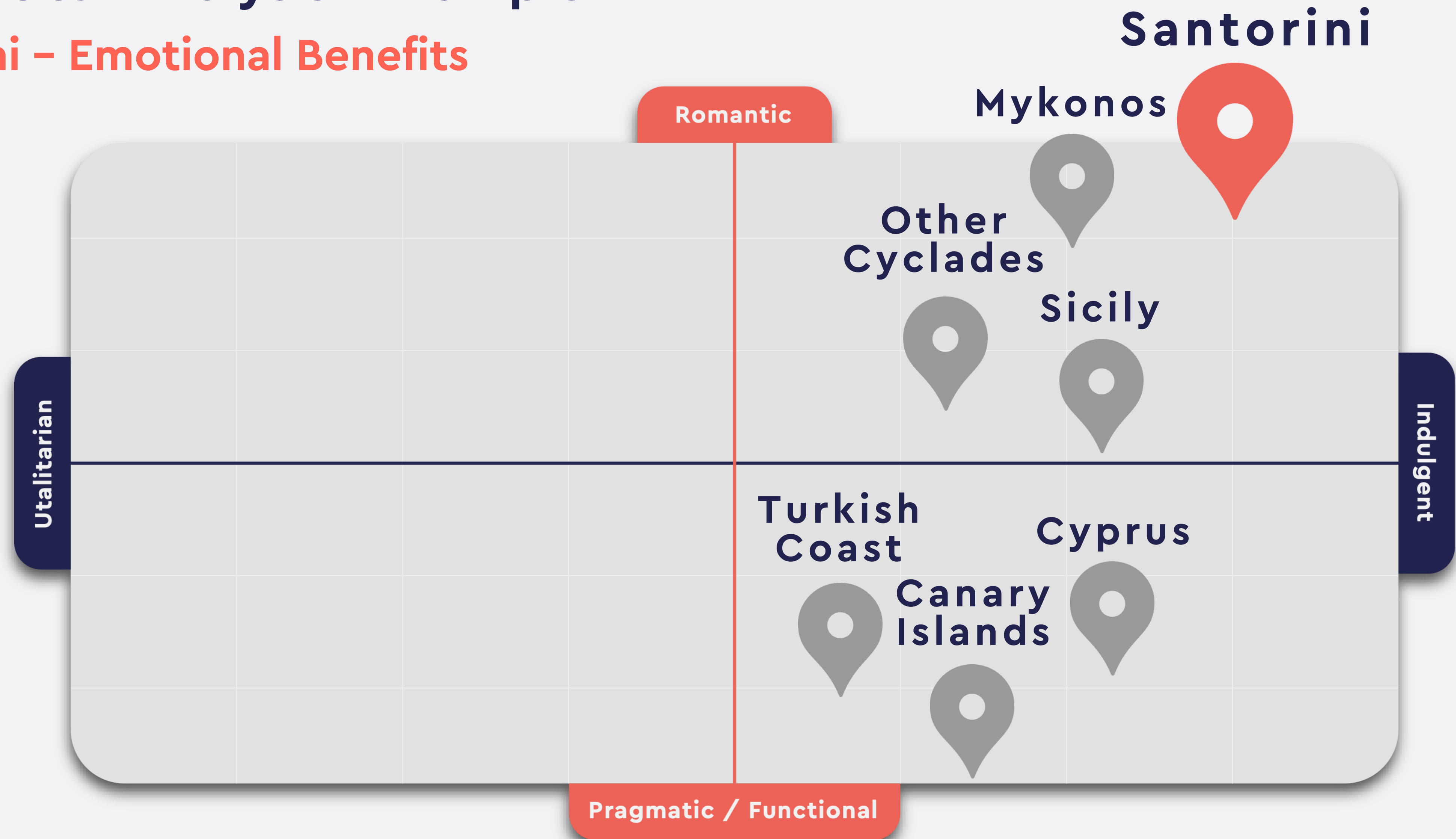
# Competitor Analysis - Example

## Santorini – Physical Assets



# Competitor Analysis - Example

## Santorini - Emotional Benefits



## Stakeholder Mapping



### Primary

Major influencers / greatest interest, who might play an active role in DMP development

e.g. municipalities, DMO, tourism industry associations, major tourism operators



### Secondary

Direct beneficiaries, who may play no active role in DMP development, but might assist with its implementation

e.g. tourism businesses, visitor attractions, cultural / heritage sites, other tourism operators



### Other

Most of rest of community, who benefit indirectly from tourism

e.g. residents, civic societies, community groups



### Roles and communications

Decide what role each will play and how you will communicate with them

e.g. DMO Board, DMP steering group; website, social media, stakeholder meetings, newsletter

## Initial Market Analysis

Identify Best Prospect Segments via



### **Existing data and consultation**

e.g. GNTO, SETE, FRAPORT, Hellenic Ports Association, Hellenic Statistics Service, Hellenic Chamber of Hotels et al



### **In-destination stakeholder consultation**

## Target Markets

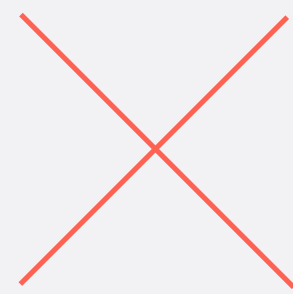
### RATIONALE



### Value

Current and future potential value

volume x spend x repeat visit propensity



### Sustainability

Impact on the island's natural environment, physical infrastructure, resources, and community – e.g. propensity to:

- spread benefits around the island,
- visit outside the main season
- consume fewer scarce resources
- minimise congestion
- contribute towards heritage preservation and natural environment conservation

## Initial Visitor Perceptions Analysis



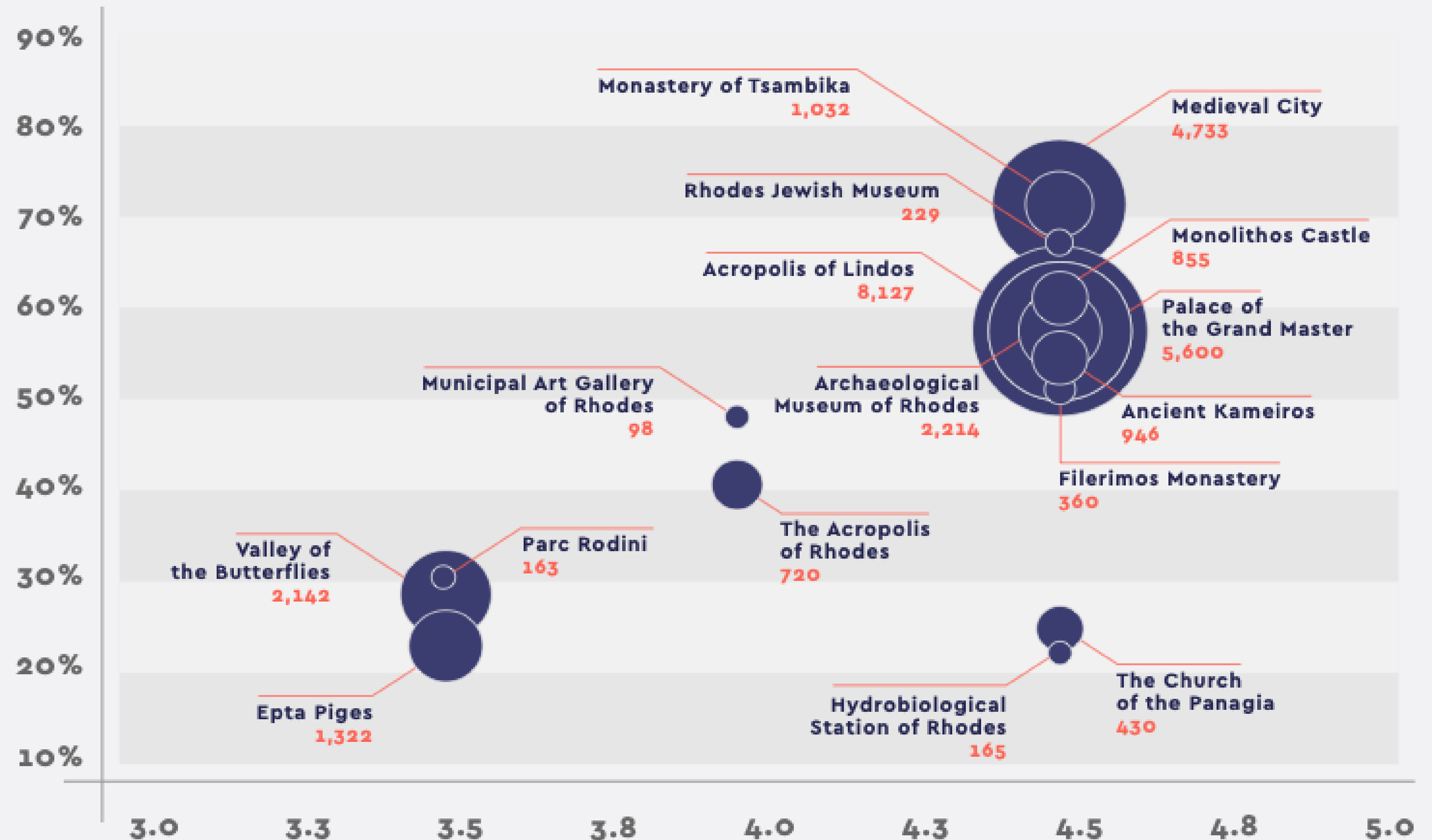
### Identify current visitor perceptions of the destination via:

- Existing visitor surveys
- Social media monitoring  
e.g. sentiment analysis
- Reviews and ratings from websites and online travel agents
- In-destination stakeholder consultation

## C MAIN STEPS IN DEVELOPING A DMP

### Situation Analysis: ATTRACTIONS - RHODES

- **Axis X:** Rating per attraction
- **Axis Y:** % of 5\* reviews per attraction
- **Bubble Size:** Number of reviews per attraction





## Initial Product / Resources Assessment

Identify Range and Quality of Main Tourism Products / Experiences in Destination

✓ **Tourism facilities**  
e.g. accommodation, restaurants / bars, attractions / retail

✓ **Heritage and culture**  
e.g. historic sites, folk traditions, arts, crafts, cuisine, living culture

✓ **Landscape / countryside**  
Nature, quality, appeal, distinctiveness  
e.g. sentiment analysis

✓ **Built environment**  
Towns, villages, public realm – appearance & maintenance, incl. architecture, public/street art/monuments, parks/gardens, commercial signage

## Initial Product / Resources Assessment

Identify Range and Quality of Main Tourism Products / Experiences in Destination



### Access / transport

Airport, roads, marine; air / ferry / cruise services; internal transport



### Visitor services

Information provision, signage (directional & interpretive), parking, toilets, shade et al, accessibility

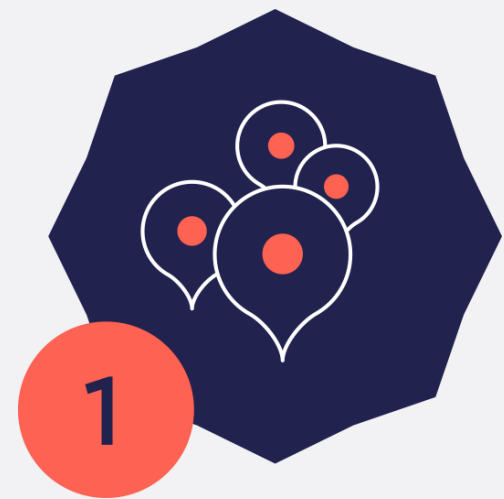


### Activities / events

Leisure, community & business events; festivals, cultural & sporting events

# Initial Product / Resources Assessment

## 5 ASSESSMENT CRITERIA



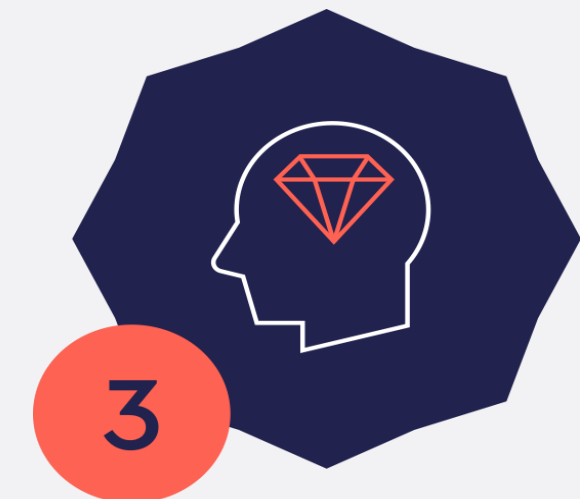
### Quantity

Inventory of main tourism products/experiences



### Quality

How good are they?



### Distinctiveness

How reflective of the destination's 'sense of place'?



### Competitiveness

Compared to tourism products/experiences in other destinations? Barriers to competitiveness? Support required?



### Future-proof

How appropriate in light of future market trends?  
Threats to viability?

## Project Communications

Ensure Stakeholders are kept up to date via:



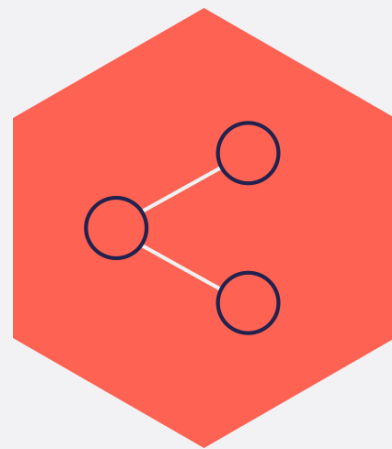
**Project  
website**



**Newsletter**  
online



**Public  
meetings**

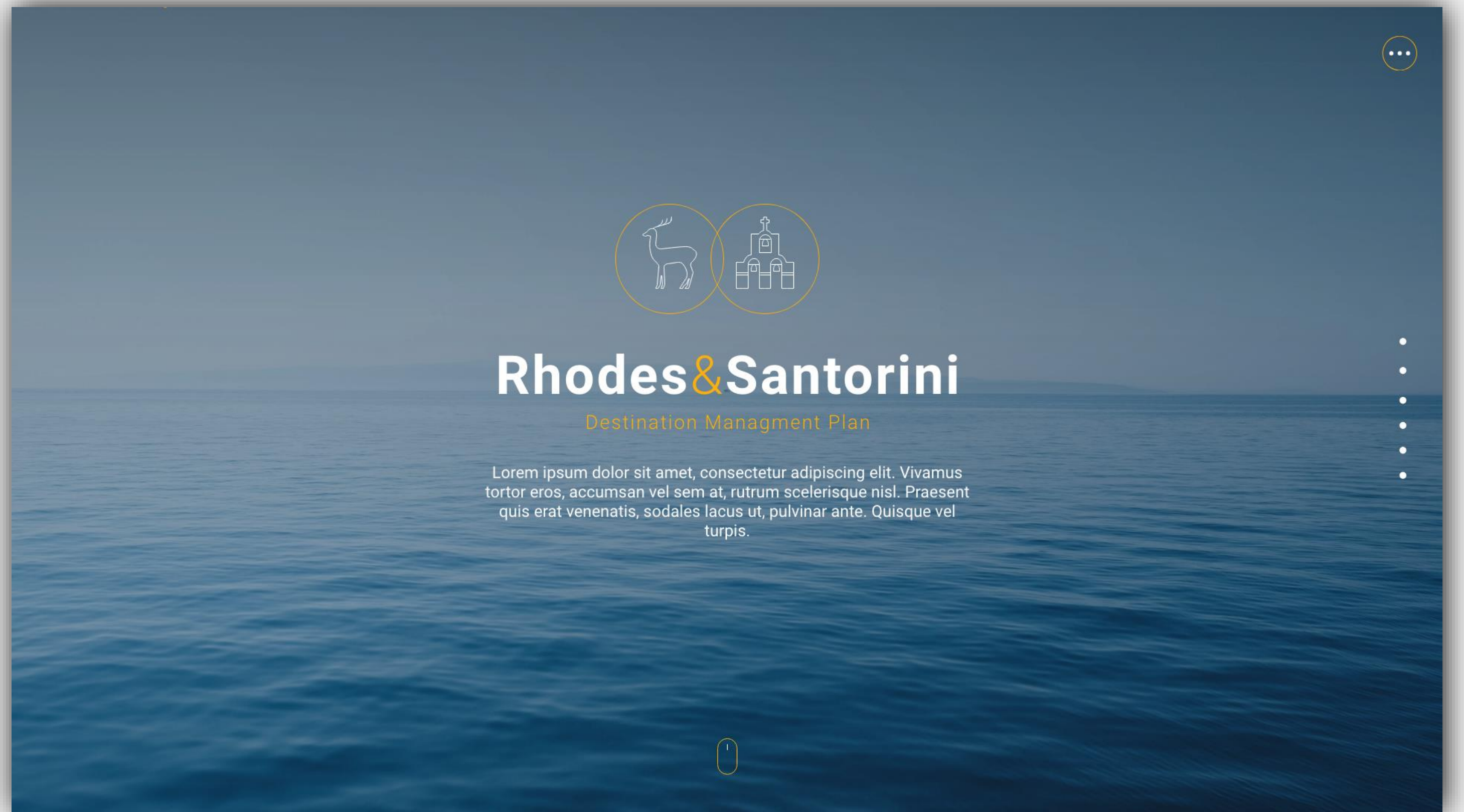


**Social media**



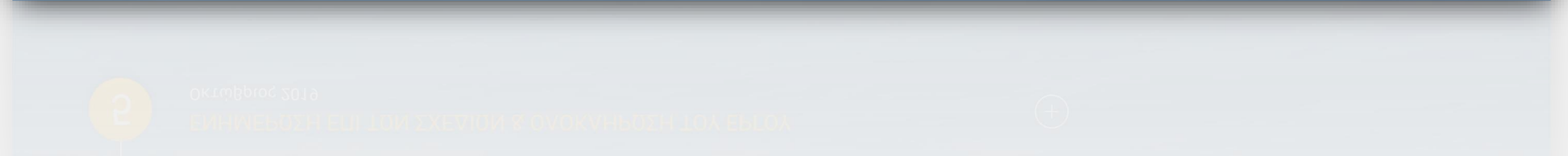
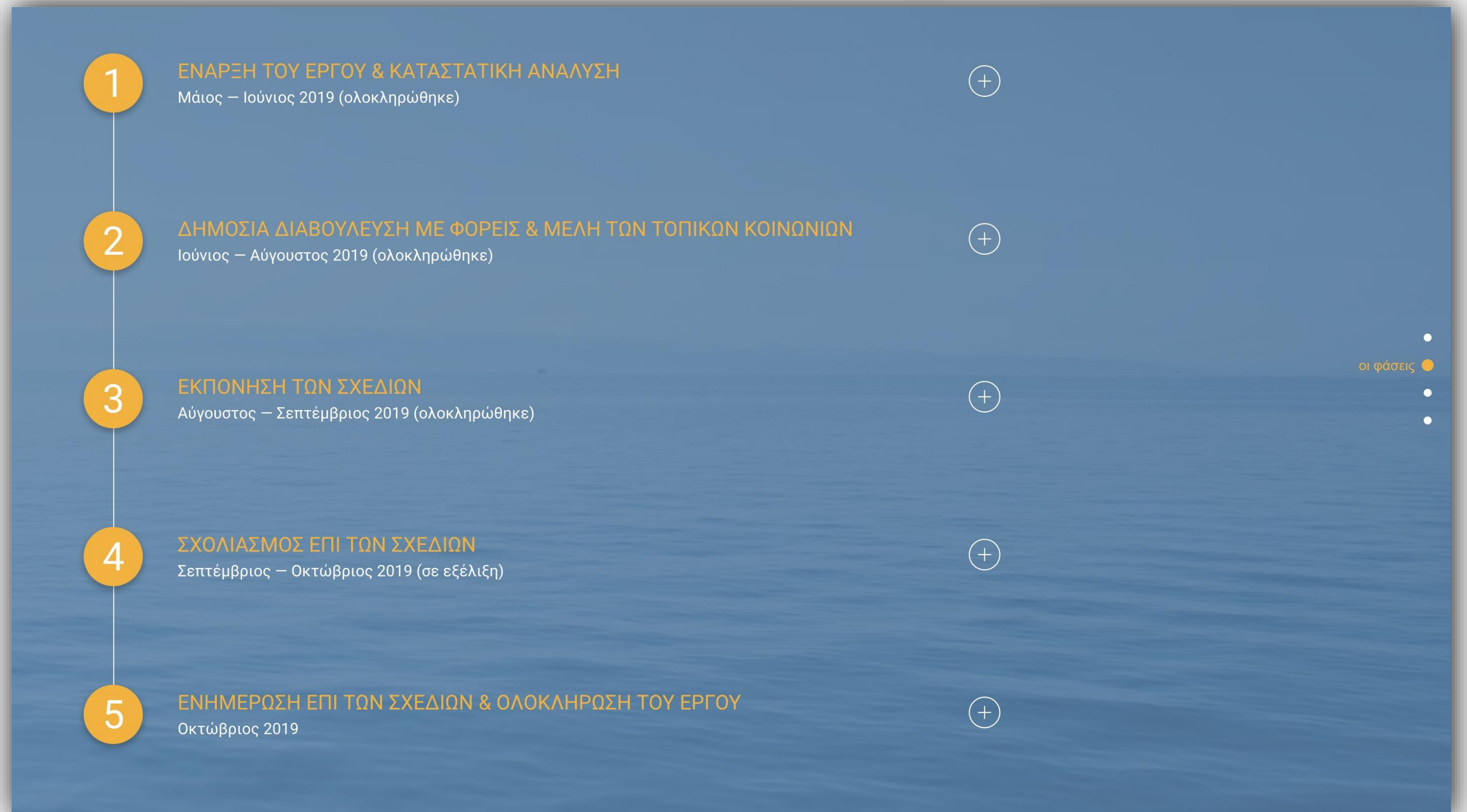
**Local media**

**Purpose: to disseminate info on project scope and the individual activities on which the input of local communities was necessary.**



## Indicative types of content

- Project background
- Project timeline
- Get involved  
(in Greek only; inactive since the end of the local surveys)
- News and announcements
- Downloads  
(inactive yet)
- Contact details



## Stakeholder Consultation

 **Stakeholder Interviews and Site Visits**

 **Community fora to**

- Seek views and concerns
- Engage and secure buy-in

 **Initial Stakeholder Workshops for Milestones and Reporting**

- Fact-finding
- Engaging and securing stakeholder buy-in

## Primary Research

### Consumer Survey: Previous Visitors

- Visitor profile
- Visitor perceptions and attitudes re destination
- Visitor likes and dislikes in destination and improvements
- Travel arrangements and planning sources/channels
- In-destination experience: products/experiences purchased/engaged in



## Primary Research



### **Consumer Survey: 'Non-visitors'** online, in-market

- Travel motivation and main products/experiences desired
- Perceptions of your destination
- Reasons for not visiting
- Other destinations visited/considered and why
- Travel planning sources/channels

## Primary Research

### Tourism Industry Survey

- Overall business performance
- Opportunities / areas of growth potential
- Constraints on business growth
- Main target markets and competitor destinations
- Main challenges
- Positive and negative impacts of tourism
- Changes desired
- 5-year perspective / forecast

## Primary Research

### Community Survey

- Satisfaction with tourism development
- Attitudes to visitors
- Positive and negative impacts of tourism
- Impact of tourism on daily life
- Overall, is tourism beneficial or detrimental – and how?
- Changes desired

## Situation Analysis Summary

### Collate Key Points Emerging from Research & Consultation

- Current destination performance
- Destination condition/status
- Attitudes to visitors
- Positive and negative impacts of tourism
- Concerns and aspirations
- Opportunities and challenges

### SWOT Analysis

- Destination SWOT: destination competitiveness
- Institutional SWOT: human resource, capacity, political, institutional, legal issues, which may affect DMP development /implementation

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# C

DESTINATION MANAGEMENT PLAN DEVELOPMENT

## MAIN STEPS IN DEVELOPING A DMP

- WHERE DO YOU WANT TO BE IN 2030?
- HOW CAN YOU GET THERE?

## Plan Development

### ✓ Strategy Development Workshops

- Key stakeholders
- Share insights from research and consultation
- Develop strategic priorities for future direction of DMP

### ✓ Aim, Vision and High-Level Objectives

### ✓ Strategic Priorities and Action Plan

- Main strategic priorities
- Actions to address each strategic priority
- Brand and brand narrative themes
- Visitor experience development framework
- Marketing plan

### ✓ Governance and Implementation

- Identify governance and implementation structures

### ✓ DMP Preparation

## Monitoring Progress



### Community

residents' satisfaction survey



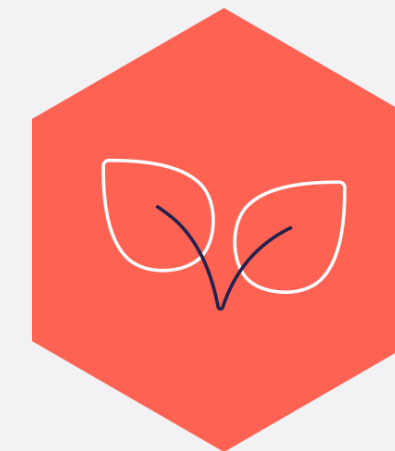
### Tourism industry

tourism performance survey



### Visitors

visitor satisfaction survey



### Environment

environmental impact study



### Performance measurement

against key DMP actions

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D

DESTINATION MANAGEMENT PLAN DEVELOPMENT

**DMP FRAMEWORK**



## Strategic Aim and Vision



### STRATEGIC AIM

*"To optimise economic benefit to Rhodes through the development of tourism, in a way that is economically, socio-culturally and environmentally sustainable and valued by residents."*



### VISION FOR RHODES BY 2030

*"An all-year-round sustainable destination of choice, through the creation and promotion of exceptional visitor experiences, designed for markets that are interested in exploring the island as a whole for its heritage, culture and outdoor activities, across all four seasons of the year; and which will bring optimum benefits for the people of Rhodes."*

# High-Level Objectives

## FOR RHODES

To be Achieved by 2030

- 1** To ensure that 75% of the tourism capacity is open for at least ten months of the year, with average room occupancy for open months of 70%; and that 50% of tourism-related jobs are available all-year round.
- 2** To increase the average daily spending of visitors to the island by 30% (at 2020 prices).
- 3** To stimulate the growth of 50 new tourism businesses or community enterprises offering new visitor experiences around the island on a year-round basis.
- 4** To establish one Signature Route (see Section 6.7) each year for seven years.
- 5** To establish a year-round programme of events designed to attract the DMP's target segments.

# Strategic Priorities

## FOR RHODES

1

**Rhodes for All Seasons**  
the 'Flagship' initiative

2

**Repositioning Rhodes**  
enhancing its image and  
broadening its appeal

3

**Creating Sustainable Rhodes**  
sustainable in terms of  
environment/natural resources,  
communities, visitors, businesses

4

**Managing Visitors in  
the City**  
maximising visitor enjoyment  
and quality of life

5

**Extending the Footprint**  
spreading tourism benefits to  
businesses and communities  
across the island

6

**Enhancing the visitor  
experience**  
focusing on quality



## The Strategic Priorities and Beneficiaries in Rhodes

The diagram shows the intended impact of the strategic priorities (the inner rings) on each of the four primary beneficiaries of the DMP (the quadrants).

- SP1** - Rhodes for All Seasons
- SP2** - Repositioning Rhodes:
- SP3** - Creating Sustainable Rhodes
- SP4** - Managing Visitors in the City
- SP5** - Extending the Footprint
- SP6** - Enhancing the Visitor Experience

# Marketing Plan: Target Segments

## FOR RHODES

### Priority #1

### "DEVELOP AND BUILD" – OFF-SEASON

Years 1-2: development; years 2-5 marketing



#### Primary Segments

- **"Culturally curious"**  
visitors from UK and Germany
- **"Outdoor enthusiasts"**  
from UK and Germany
- **"Off-season short breakers"**  
from UK and Germany



#### Secondary Segments

- **"Off-season short breakers"**  
from Sweden, Poland, Israel and Russia
- **"Special interest devotees"**  
from UK and Germany
- **"MICE"**  
– primarily conference and incentive visitors – from UK and Germany, followed by Sweden

## Brand Image and Proposition



**Destination  
positioning:**

**“Familiar, yet  
undiscovered”**



**Brand proposition**

**“Historic beach”:  
beyond the beach –  
layers of history,  
surprisingly green,  
refreshingly active**

## Brand Narrative Themes



Undiscovered Gems



Landscape Variety



Cultural Diversity



Colossal Characters



Active escape

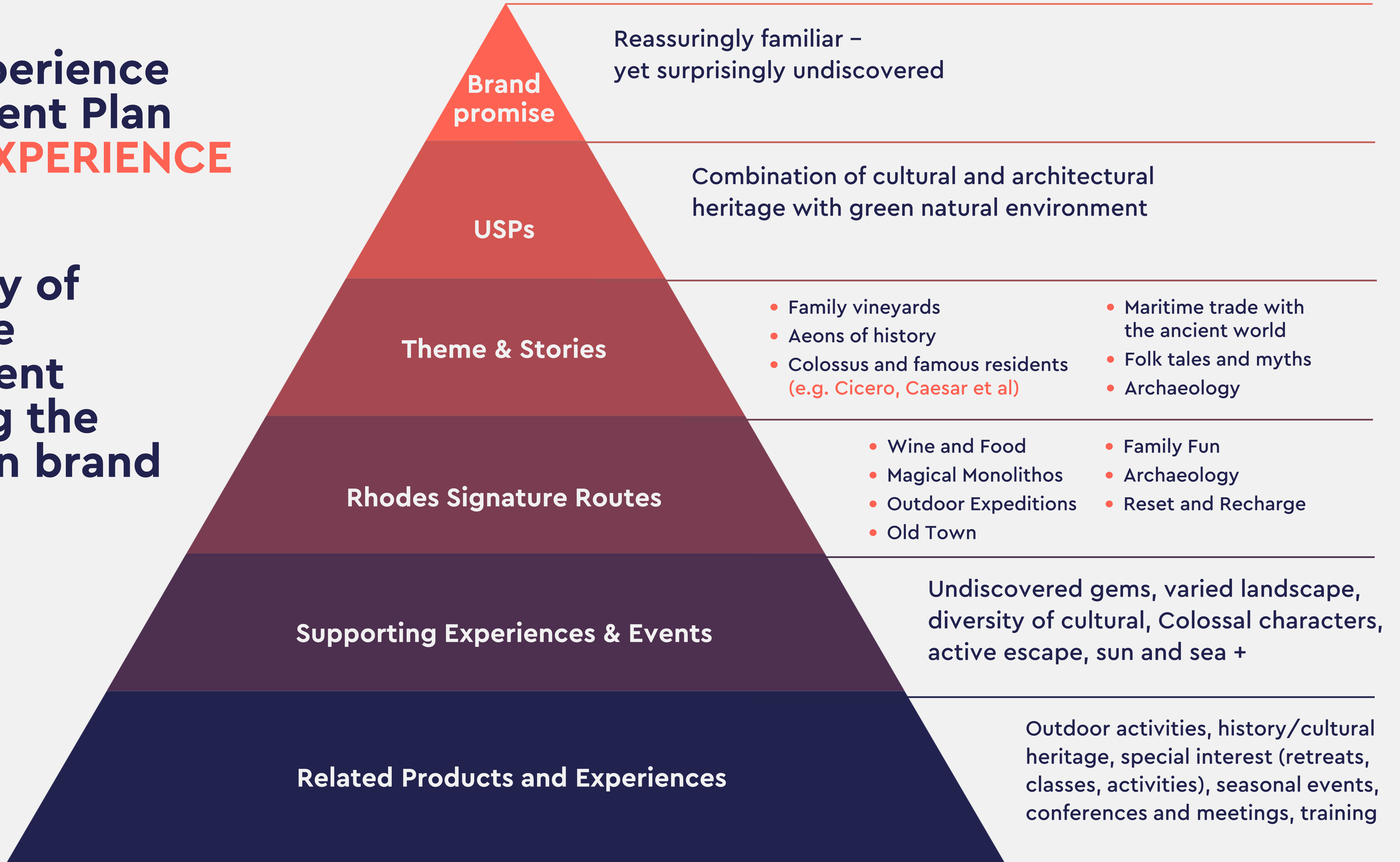


Sun and sea +

# Visitor Experience Development Plan

## VISITOR EXPERIENCE PYRAMID

A hierarchy of experience development supporting the destination brand





## Strategic Priority #1 EXAMPLE: DUBROVNIK

Making Santorini Sustainable For the Decades to Come (cont.)



### ✔ Manage visitor numbers in line with carrying capacity

- 3 cruise ships p. day: 2 morning, 1 after 12.00 hrs
- 4,000 passengers ashore p. day (2020)
- €2 cruise passenger levy (2021)



## Strategic Priority #5 Example: Istria

Extending the Season – new experiences for the off-season, providing a model for attracting higher revenue summer tourism (cont.)



### ✓ Istria, Croatia

- Gourmet Tourism Product Development
- 8 "Roads": wine roads, olive oil roads
- Gourmet Festival: restaurants + producers
- DMO-run
- 7 new wineries, 117 wine makers
- 137 olive growers
- 150,000 visitors p.a.



## **Scenario #1** Creation of an Entity by One or More, Public and/or Private Sector Stakeholder

Changes to Legislation Would Be Required

- **National Level:**

Amendments to the framework on public and private partnerships

(Law 3389/2005 as amended by Law 3463/2006)

- **Regional-Local Level:**

Amendments to the framework on 'Networks of Municipalities and Regions

[Law 3463/2016 (Articles 219 & 220) and Law 3852/2010 (Article 101)]

- **Local Level:**

Amendments to the framework on Development Companies

(Law 3463/2006 as amended by Law 3852/2010 and Law 4555/2018)

## Scenario #2 Allocation of Responsibilities for Implementing the DMP to an Existing Organisation

Local Challenges and a Potential Role for the Region of South Aegean

### Local Challenges

- Geothira Sole Shareholder S.A: This type of municipal company is not allowed to sign programmatic agreements
- Lack of a Directorate of Tourism under the Municipality
- Termination of the activity of the non-profit Cyclades Progress & Development Organization

### Role for the Region

- A leading role for the Region of Aegean mainly through its Development Agency – “ENERGIAKI S.A.”?
- Putting the implementation of the DMP under the umbrella of the Region's Directorate of Tourism, ENERGIAKI S.A. would act as a vehicle for mobilizing domestic and EU funds.
- The Region would then work closely with the Municipality of Santorini and local stakeholders on selected actions.

## **Scenario #3** Establishment of a lighter and more flexible governance structure

Mutual Agreement on A Strategic Agenda and Individual Commitment to a Group Effort

**THIS  
IS  
ATHENS  
& PARTNERS**



## Challenges in Preparing a DMP

✓ **Time frame**  
6 months min.

✓ **Stakeholder participation and buy-in**

✓ **Stakeholder availability**

✓ **Resource availability**

✓ **Implementation threats**

✓ **Changing circumstances**

## Critical Success Factors

- 1** Partnership at Board/steering group level
- 2** Commitment of regional and municipal authorities
- 3** Involvement of all tourism-related sectors
- 4** Endorsement and active support from the Ministry of Tourism and other Ministries, as required
- 5** Collaboration between key tourism stakeholders (e.g. airports, ports, roads, infrastructure, utilities)

## Critical Success Factors

- 6** Community engagement and understanding
- 7** Recognition of role tourism can play in economic, socio-cultural and environmental sustainability
- 8** Adequate funding
- 9** Appropriate skills



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E

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

**SELECTION OF ISSUES FOR  
DISCUSSION**

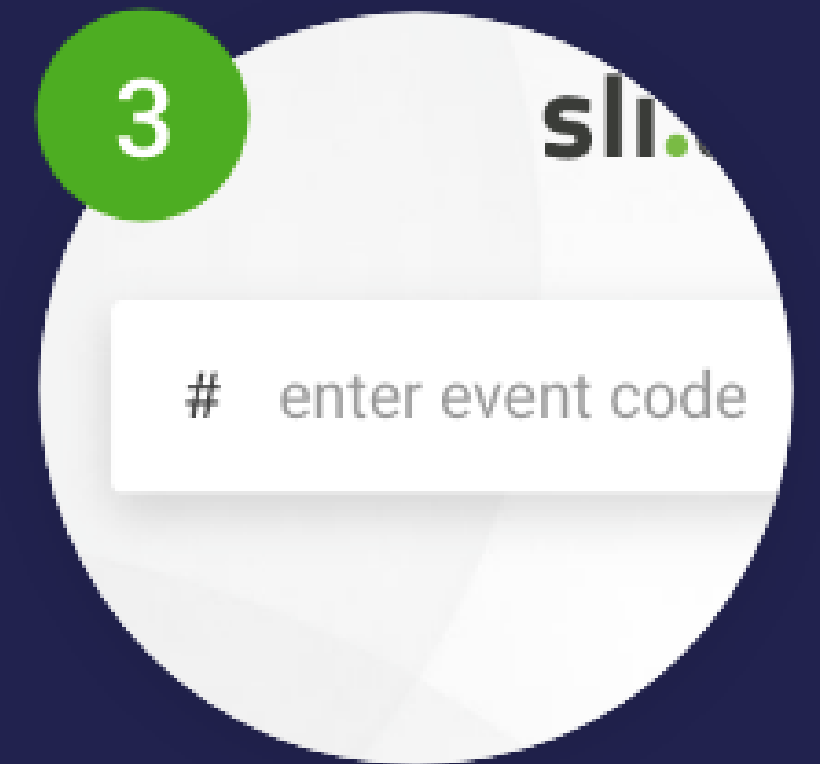
# Join the conversation Samaria



Open browser



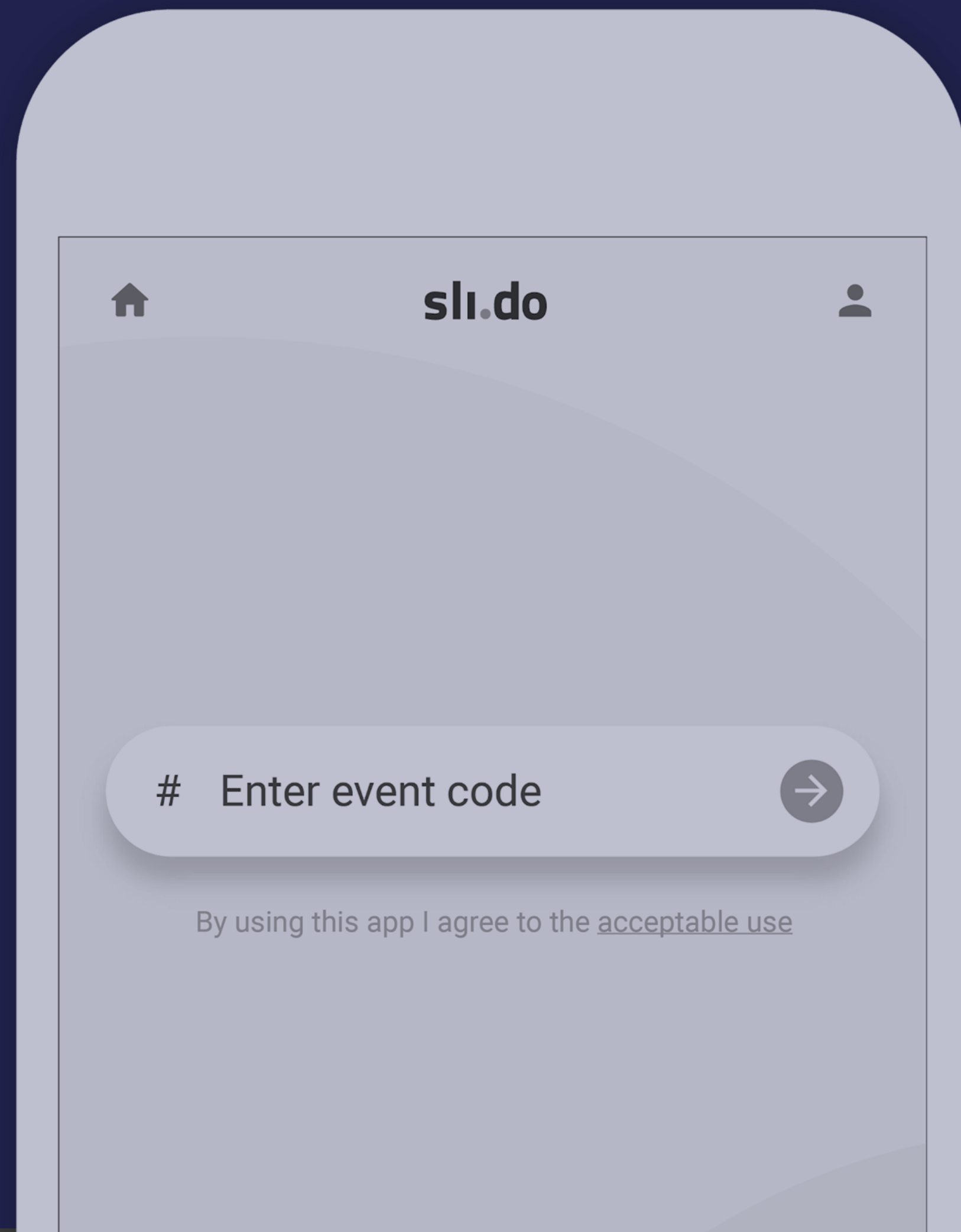
Go to [slido.com](https://slido.com)



Enter event code

# Join the conversation

## Samaria



Go to **slido.com** and  
enter the event code:

**#Chaniadmp**

## Basic Ingredients

✓ Brand image

✓ Main competitors

✓ SWOT

✓ Challenges

✓ Vision

✓ Objectives

✓ Main markets

✓ Strategic  
priorities

✓ Visitor  
products/  
experiences

✓ Governance

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F

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

**KEY ISSUES FOR DMP  
DEVELOPMENT – IN GROUPS**

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G

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

**FEEDBACK AND DISCUSSION -  
PLENARY**

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H

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

**CONCLUSIONS AND Q & A**

THANK  
YOU!

TEAM / YELLOW RAILROAD / TOPOSOPHY