# GUIDE TO DESTINATION MANAGEMENT PLANNING
# PILOT PROGRAMME FOR GREEK DESTINATIONS

**European Bank**
for Reconstruction and Development

European Bank for Reconstruction
and Development (EBRD) in cooperation
with The Ministry of Tourism and the
Region of Ionian Islands

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

—

GREEK TOURISM
CONFEDERATION (SETE)

# Milestones

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

# TODAY'S AGENDA

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

# PART 2: THE DESTINATIOM MANAGEMENT PLANNING GUIDE & INTERACTIVE DISCUSSION OF 'KEY ISSUES'

**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

**E**

The Destination Management Planning Guide

**F**

Selection of issues for discussion

**G**

Feedback and discussion - plenary

**H**

Conclusions and Q & A

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 Ionian Islands

- Sustainability challenge

- Increasing focus on destination management

- National policies on attracting new, higher yield markets

- Thomas Cook collapse drives market restructuring

- Opportunity for residents in Ionian Islands 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

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

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

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

# 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.

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.

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

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.

**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**

✓ **Review of 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**

C

DESTINATION MANAGEMENT PLAN
DEVELOPMENT

# MAIN STEPS IN DEVELOPING A DMP

- ## WHERE ARE YOU NOW?

# Inception Meeting

## Inception Meeting

- 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:
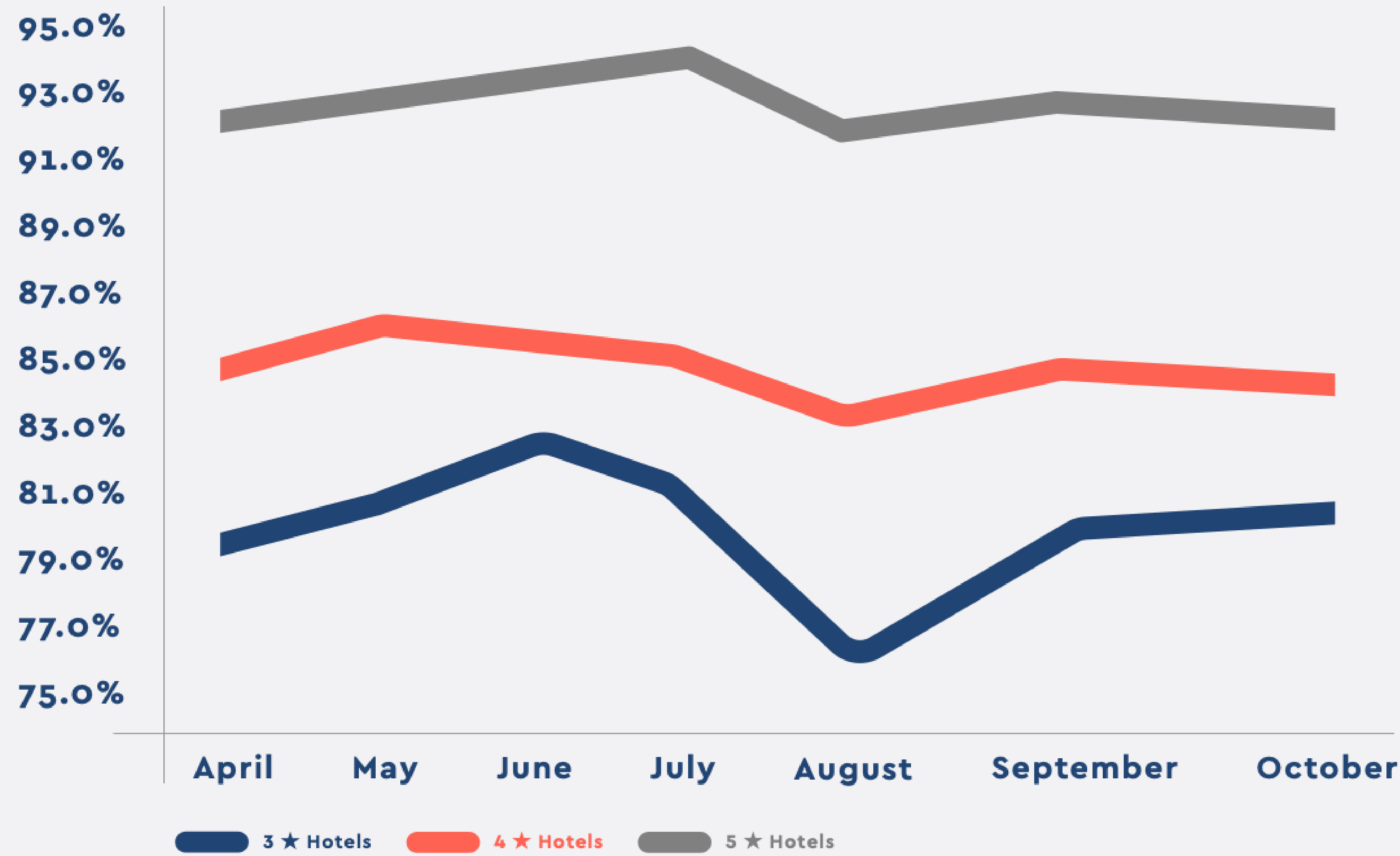## HOTEL CAPACITY
## EVOLUTION - RHODES

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



| | 2012 | 2018 |
|---|---|---|
| 5★ | 20% | 33.1% |
| 4★ | 43.1% | 38.2% |
| 3★ | 19% | 15.4% |
| 2★ | 15.7% | 11.5% |
| 1★ | | |
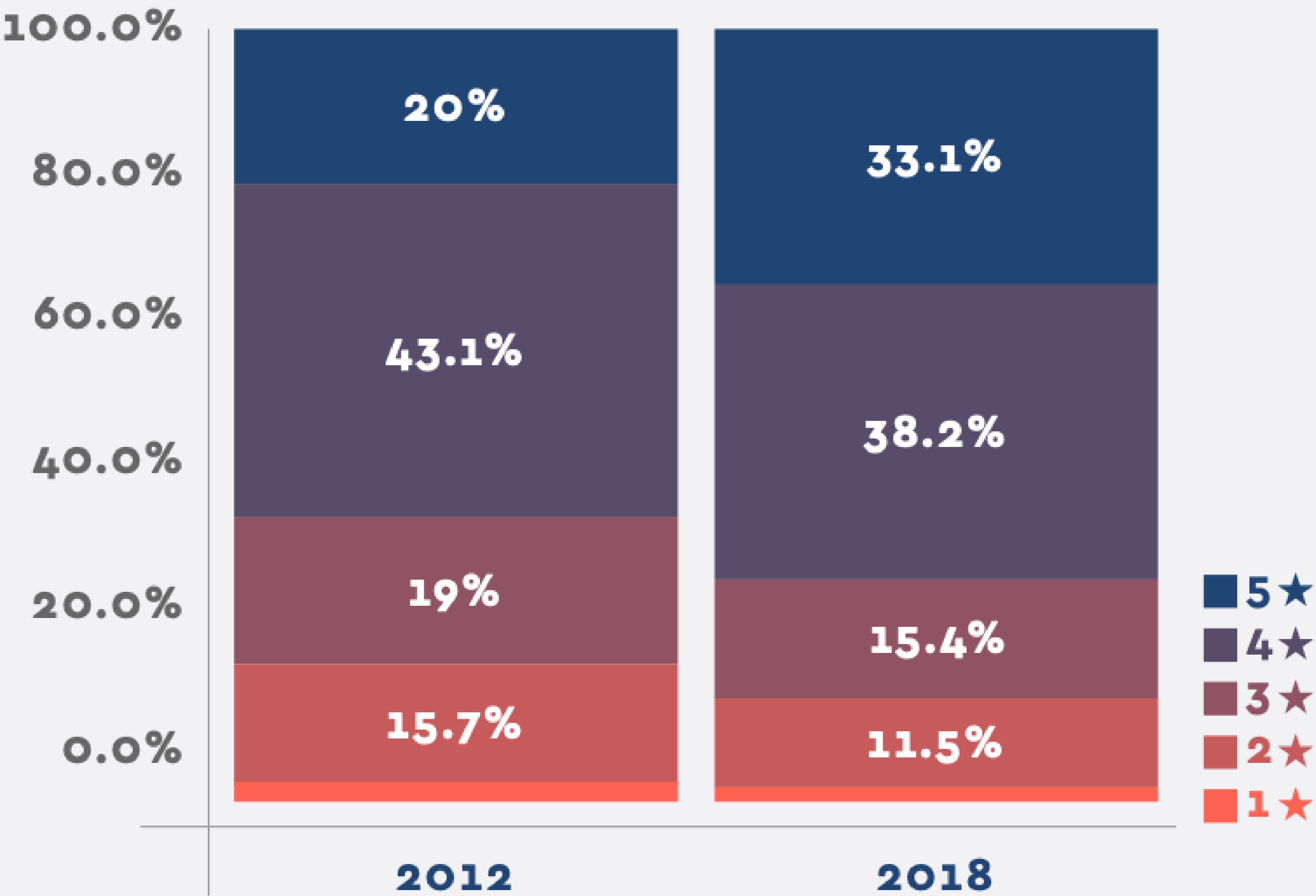
## Situation Analysis:
## GRI SCORES FOR 3*, 4* & 5* HOTELS IN RHODES (2018)

Average scores higher than 80% in all cases.



95.0%
93.0%
91.0%
89.0%
87.0%
85.0%
83.0%
81.0%
79.0%
77.0%
75.0%

April   May   June   July   August   September   October

3 ★ Hotels          4 ★ Hotels          5 ★ Hotels

SOURCE: REVIEW PRO DATA BY SETE INTELLIGENCE (INSETE)
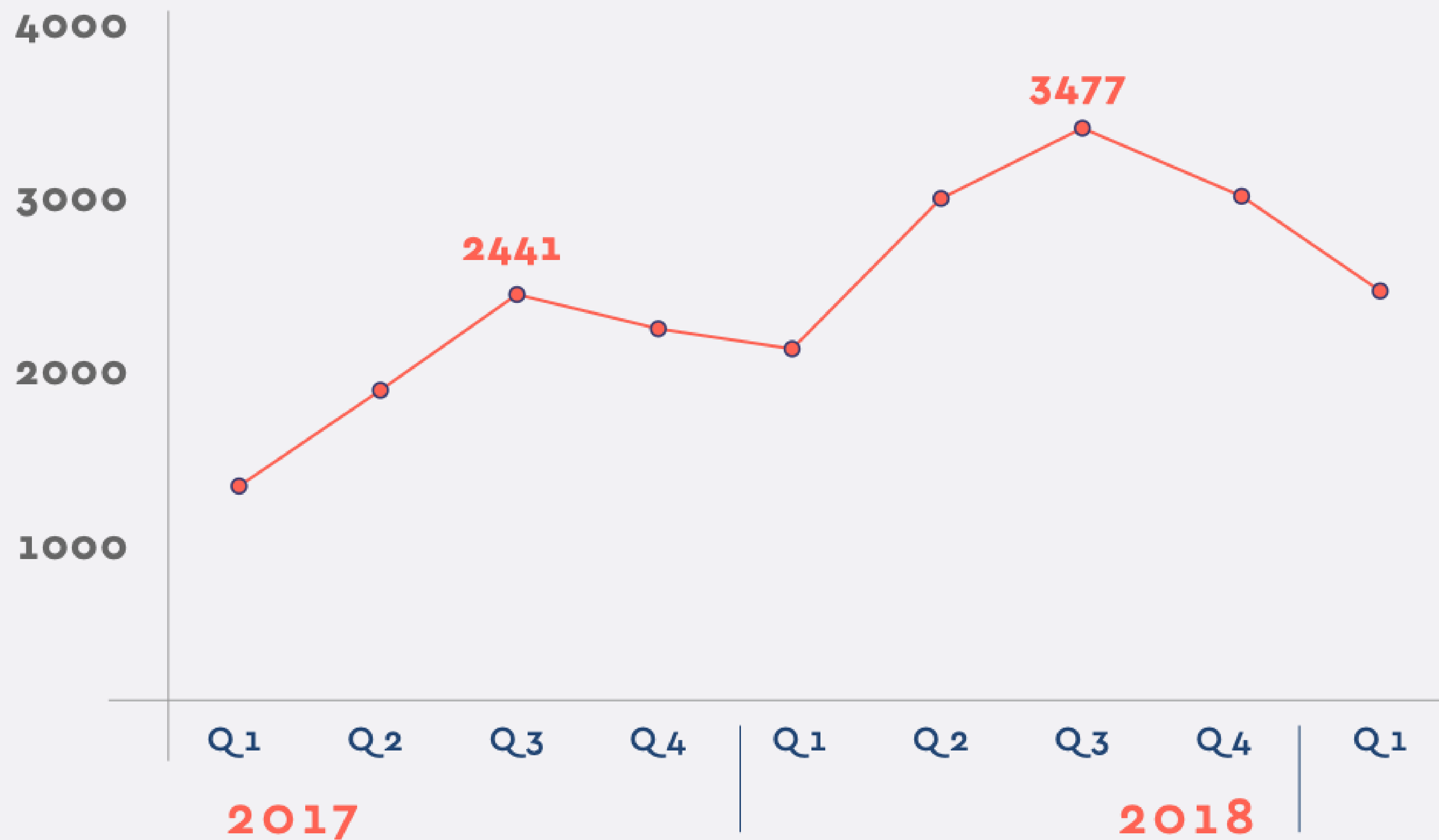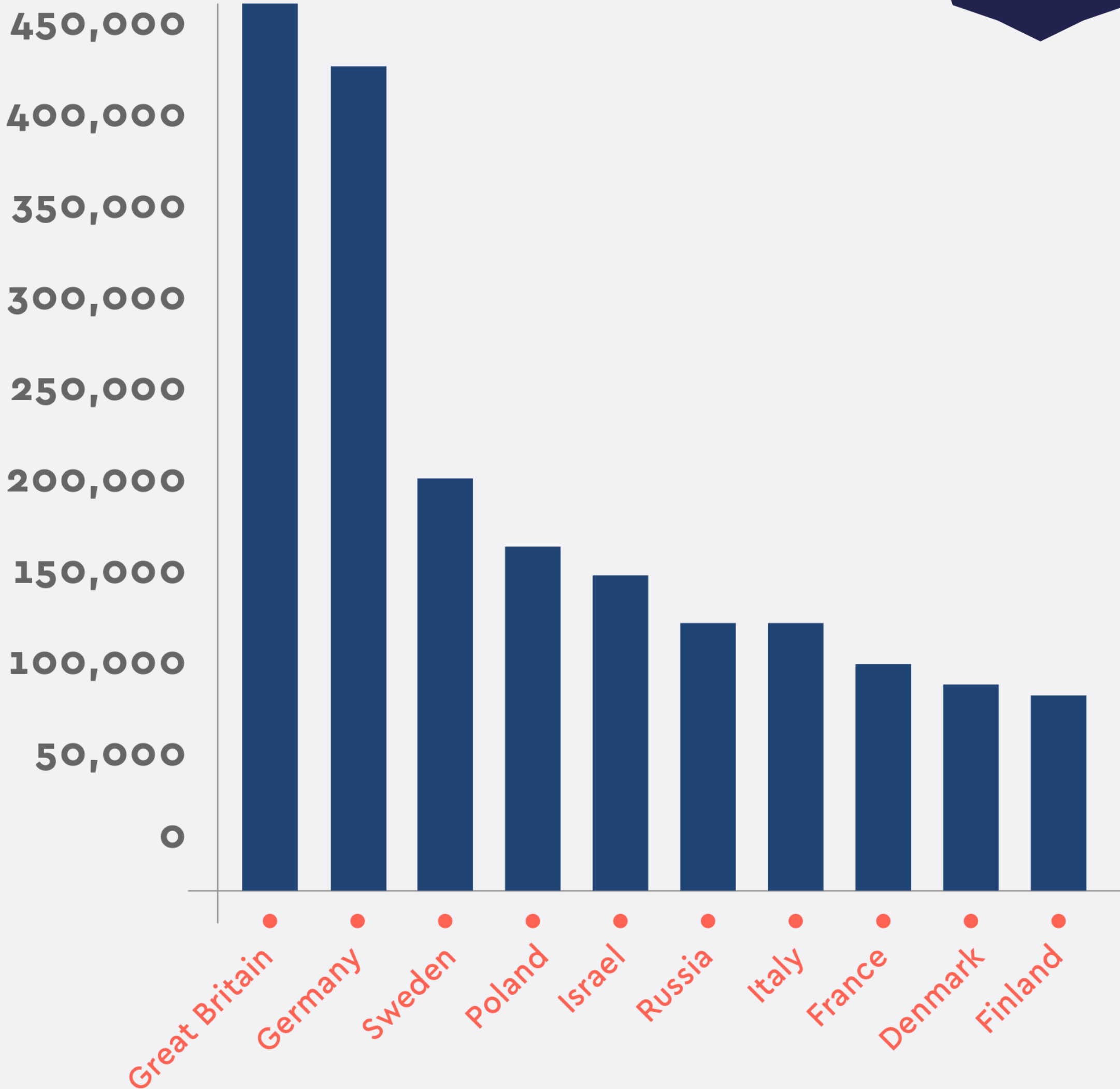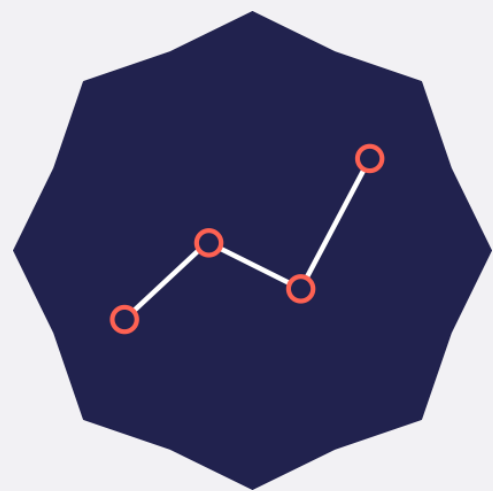
# Situation Analysis:
## SHORT-TERM RENTALS - RHODES

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



SOURCE: AIRDNA
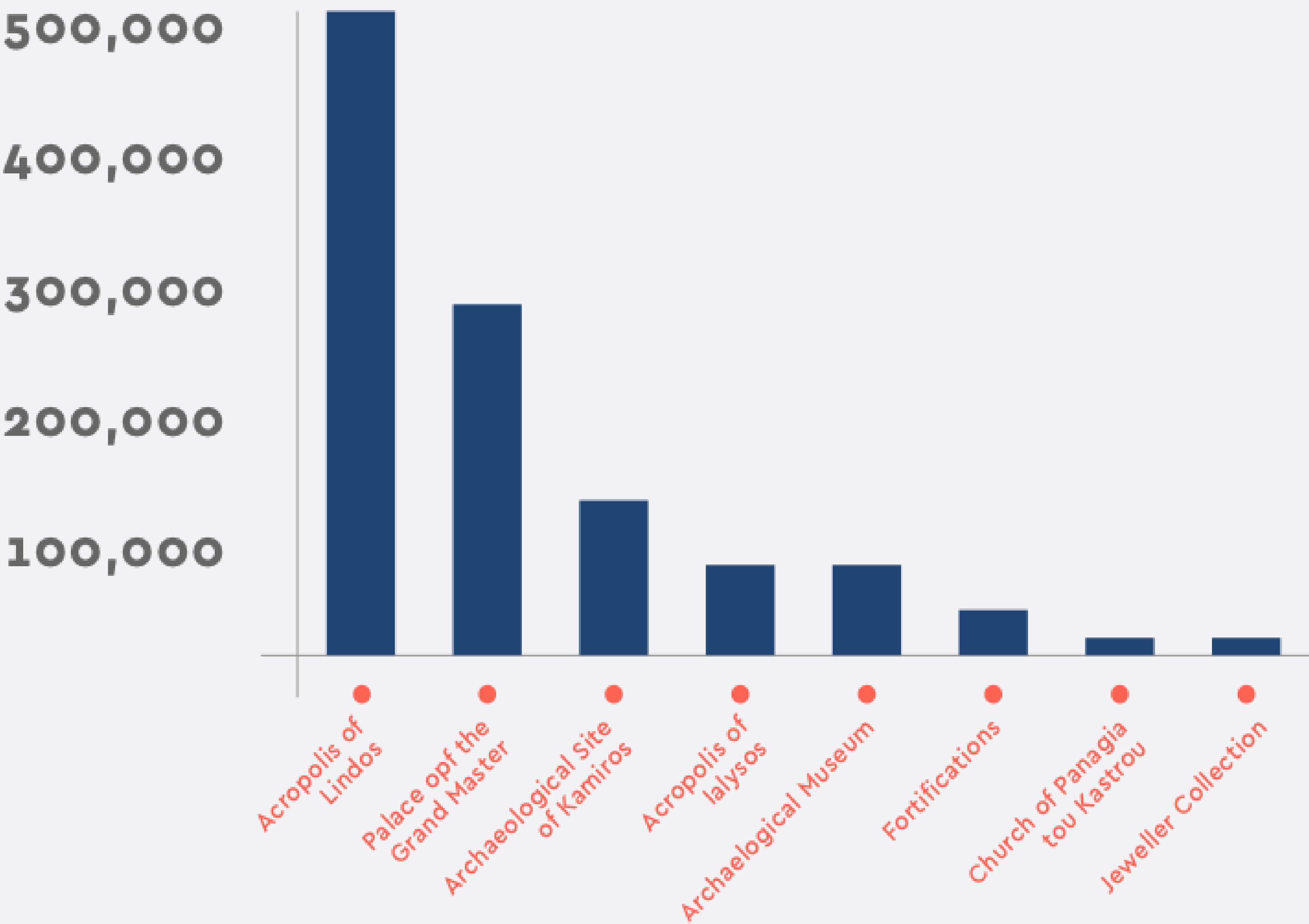
## Situation Analysis:
# MARKETS – RHODES
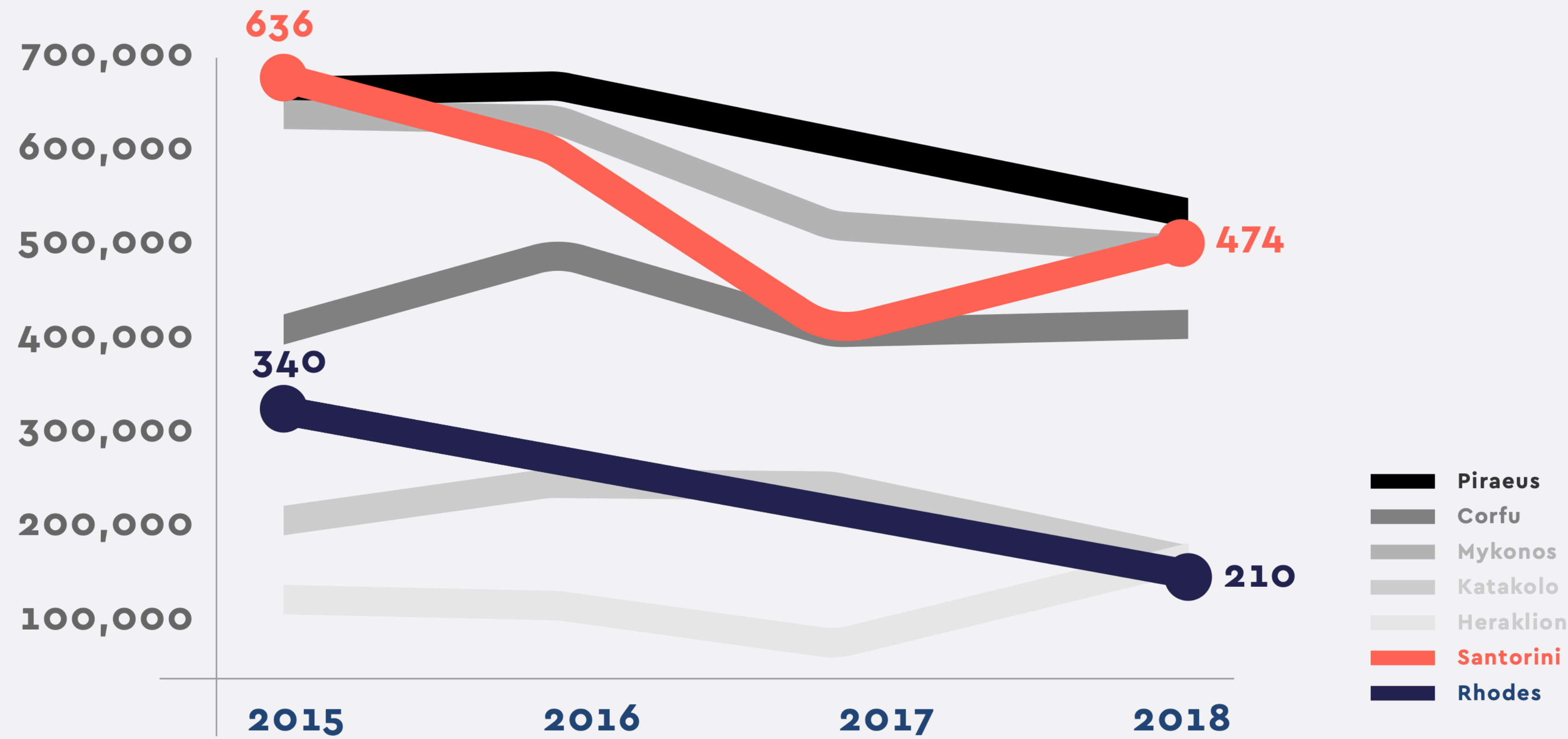
International
Arrivals at Rhodes
International
Airport (2018)



SOURCE: FRAPORT GREECE

# Situation Analysis:
## ATTRACTIONS – RHODES

Admissions at
Archaeological
Sites and Museums
in Rhodes, 2018



500,000

400,000

300,000

200,000

100,000

Acropolis of
Lindos

Palace opf the
Grand Master

Archaeological Site
of Kamiros

Acropolis of
Ialysos

Archaelogical Museum

Fortifications

Church of Panagia
tou Kastrou

Jeweller Collection

SOURCE: HELLENIC STATISTICS SERVICE

# Situation Analysis:
## CRUISE SHIP VISITS
## IN GREECE (2015-2018)

636

340

700,000

600,000

500,000 — 474

400,000

300,000

210

200,000

100,000

**2015**    **2016**    **2017**    **2018**

Piraeus
Corfu
Mykonos
Katakolo
Heraklion
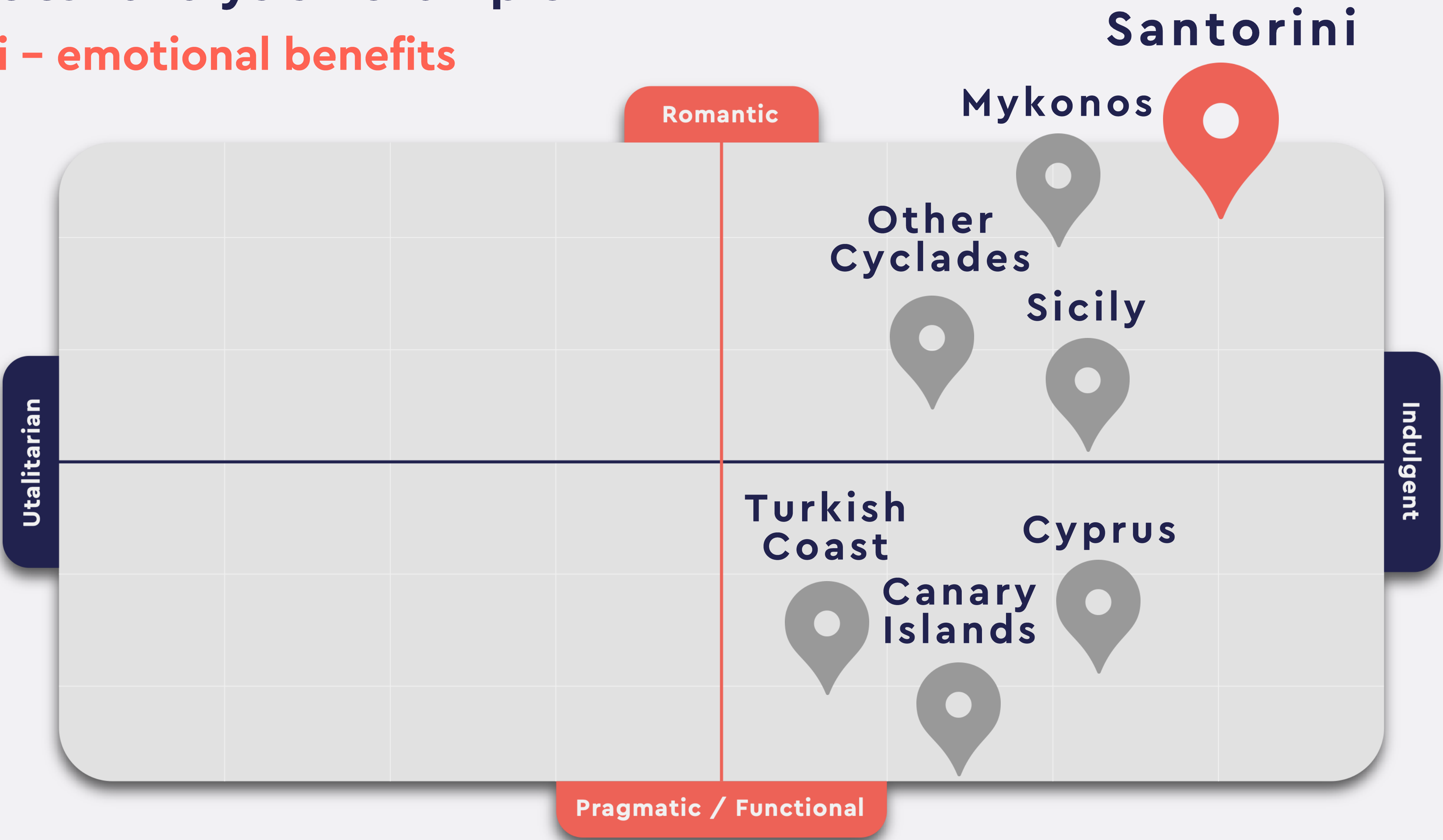Santorini
Rhodes

SOURCE: HELLENIC PORTS ASSOCIATION

# Competitor analysis - example
## Santorini – physical assets
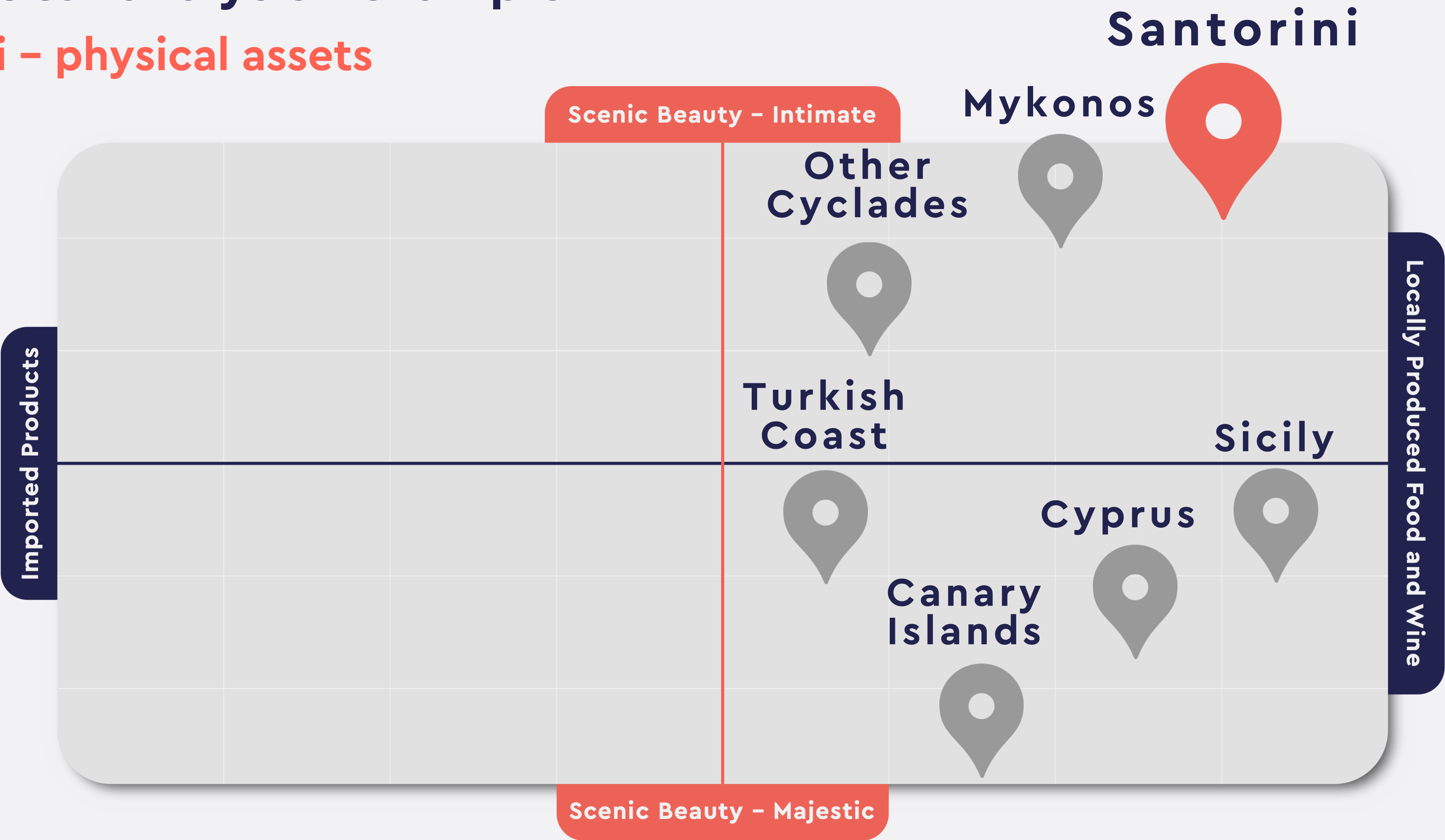
# Competitor analysis - example
## Santorini – emotional benefits

# 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

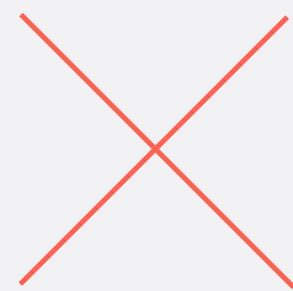✓ **In-destination stakeholder consultation**

# 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
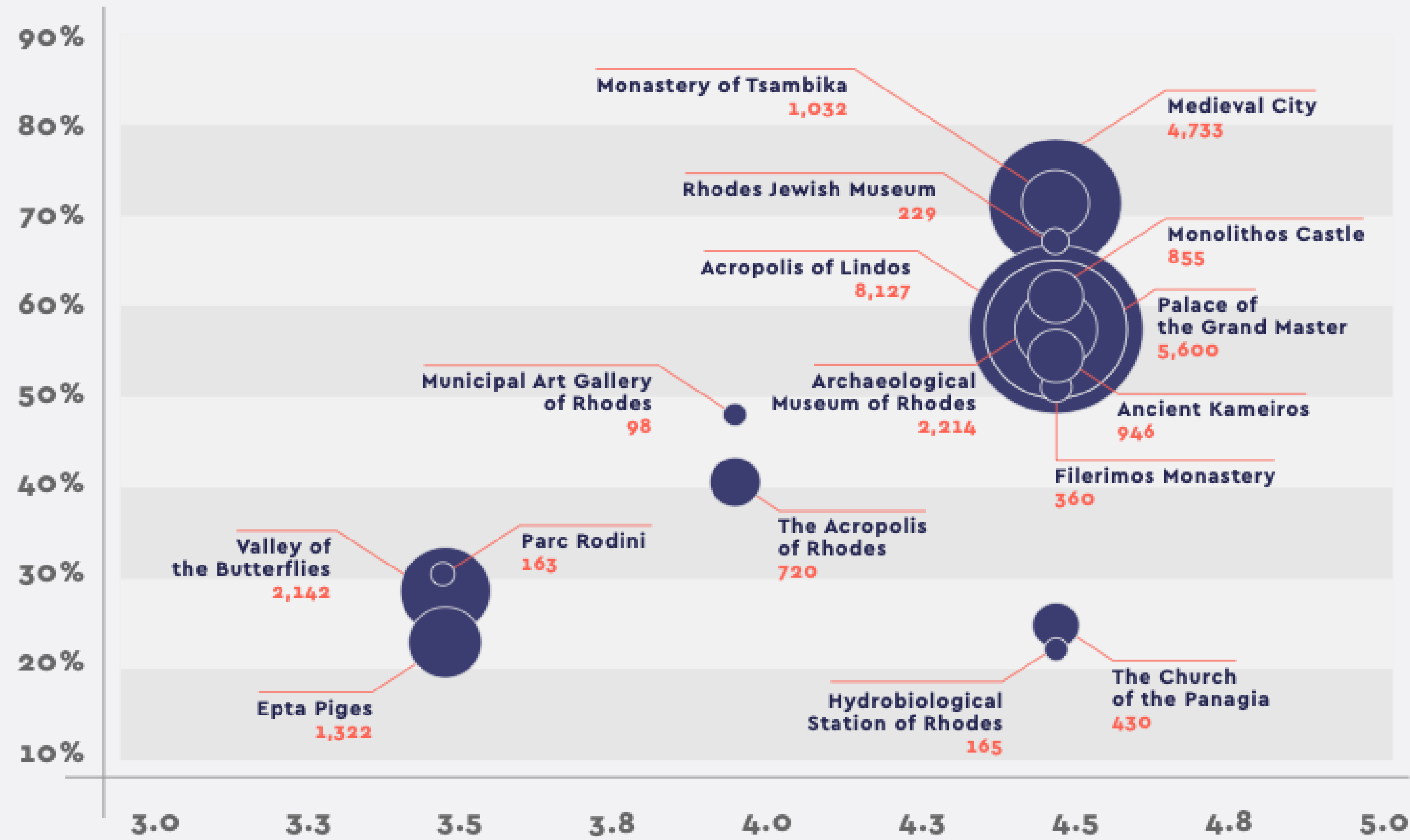
# Initial Visitor Perceptions Analysis

✓ **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

## Situation Analysis:
## ATTRACTIONS - RHODES

- **Axis X:** Rating per attraction

- **Axis Y:** % of 5* reviews per attraction

- **Bubble Size:** Number of reviews per attraction



Monastery of Tsambika
1,032

Medieval City
4,733

Rhodes Jewish Museum
229

Monolithos Castle
855

Acropolis of Lindos
8,127

Palace of
the Grand Master
5,600

Municipal Art Gallery
of Rhodes
98

Archaeological
Museum of Rhodes
2,214

Ancient Kameiros
946

Filerimos Monastery
360

The Acropolis
of Rhodes
720

Valley of
the Butterflies
2,142

Parc Rodini
163

Hydrobiological
Station of Rhodes
165

The Church
of the Panagia
430

Epta Piges
1,322

90%
80%
70%
60%
50%
40%
30%
20%
10%

3.0    3.3    3.5    3.8    4.0    4.3    4.5    4.8    5.0

# 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

## ✓ Activities / events

Leisure, community & business events; festivals, cultural & sporting events
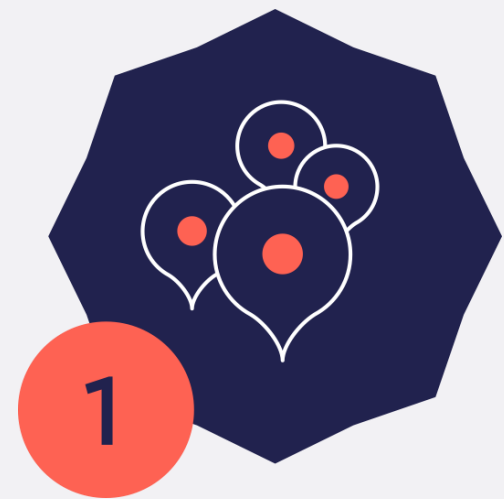
## ✓ Visitor services

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

# Initial Product / Resources Assessment
## 5 ASSESSMENT CRITERIA

**1**

## Quantity
Inventory of main tourism products/experiences

**2**

## Quality
How good are they?

**3**

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

**4**

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

**5**

## Future-proof
How appropriate in light of future market trends? Threats to viability?

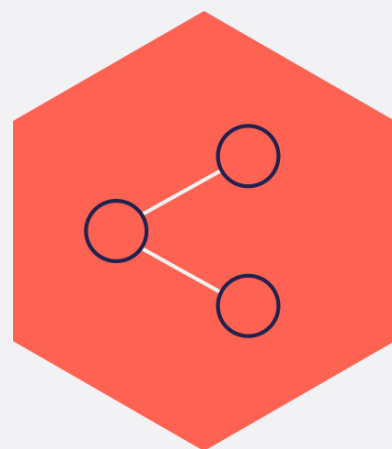# Project Communications

Ensure stakeholders are kept up to date via:

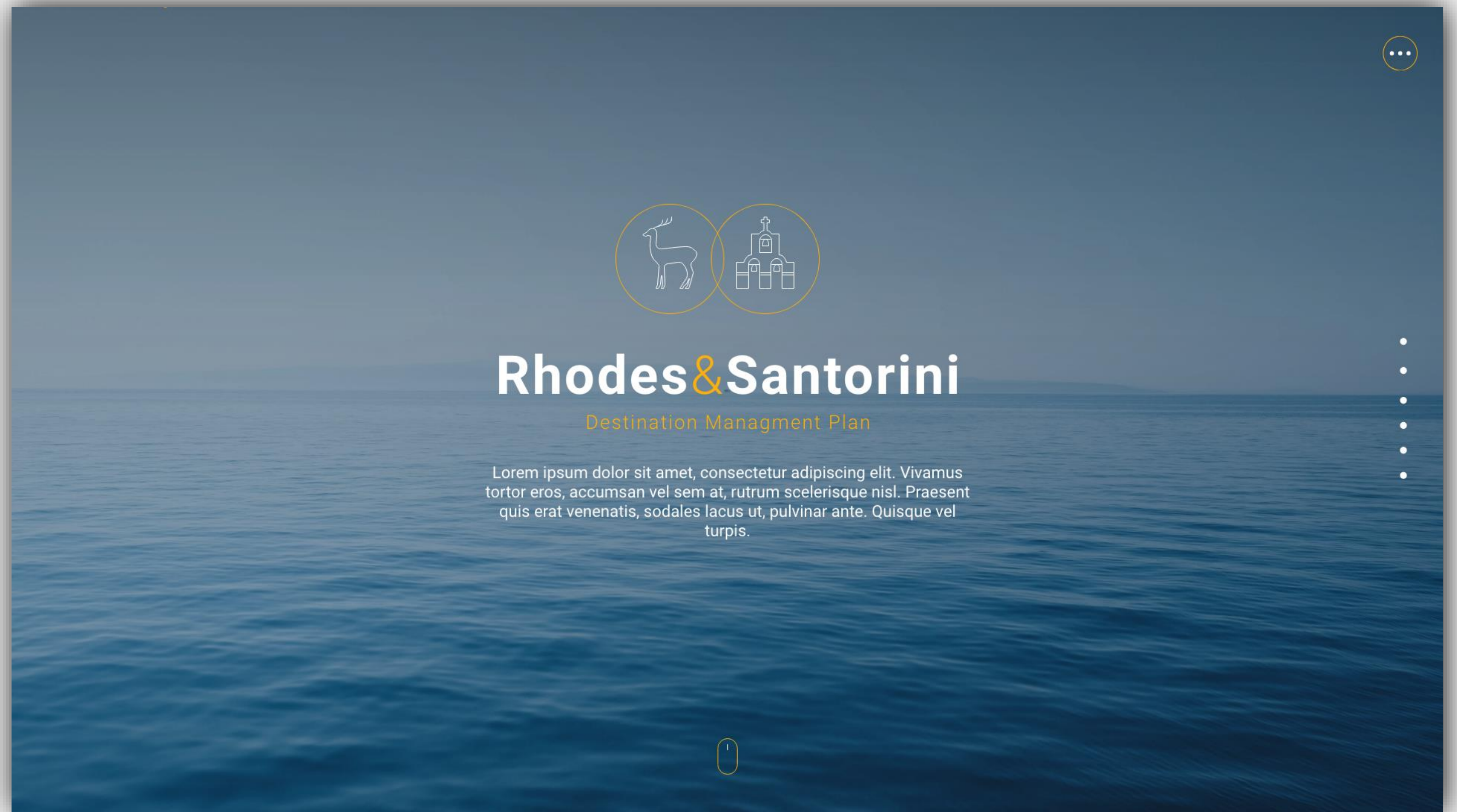**Project website**

**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.
**www.destinationmanagementplan.gr**

# 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
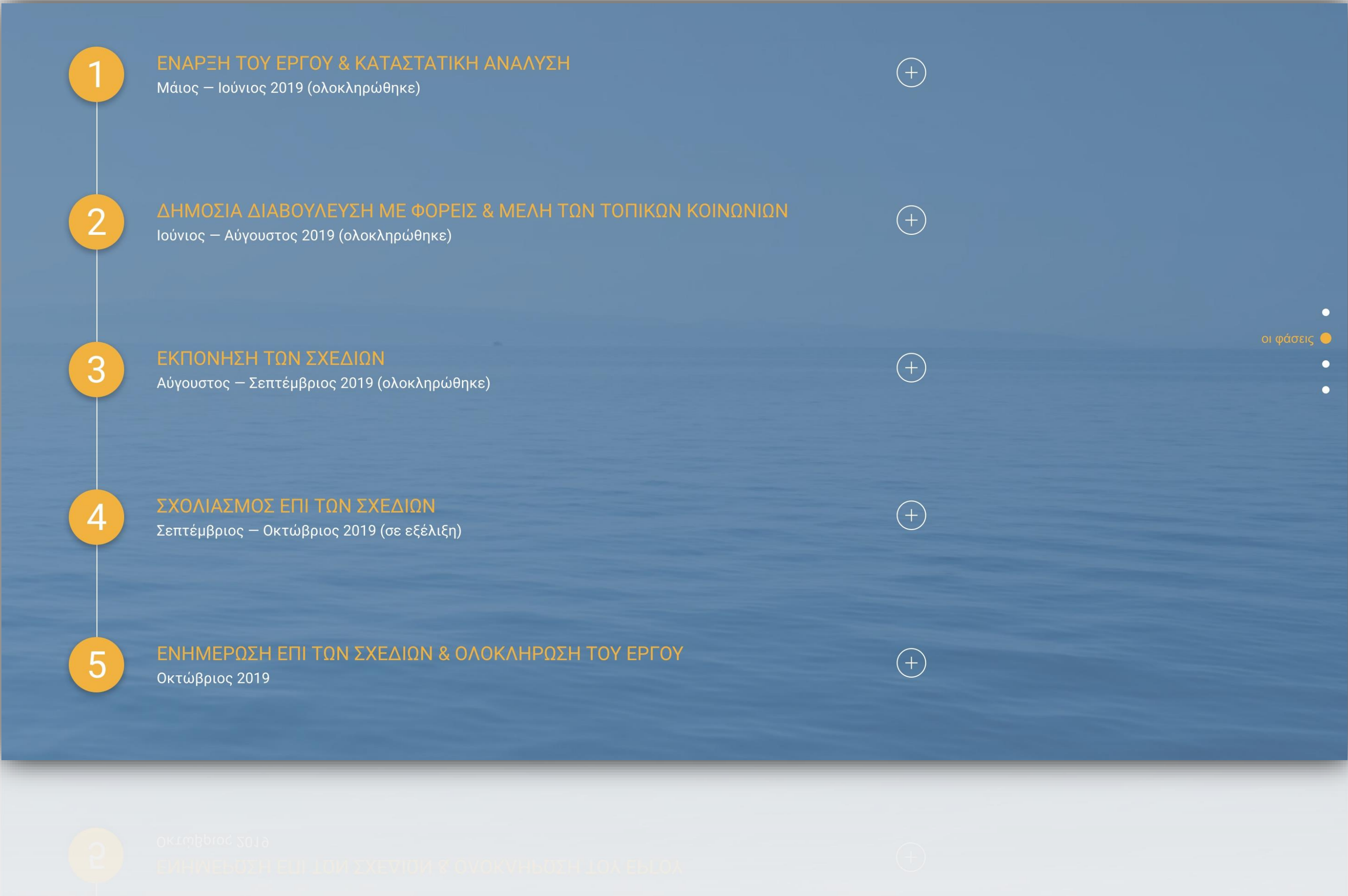
# Stakeholder Consultation

✓ **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

C

# 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

### Policy Discussion Paper including 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

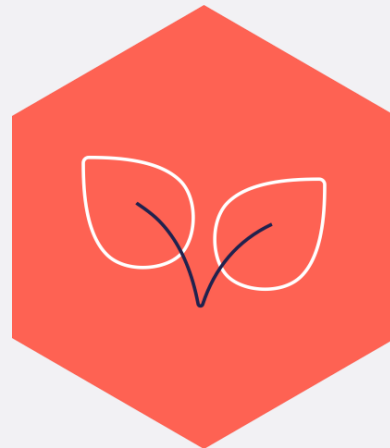# Monitoring Progress

**Community**
residents' satisfaction survey

**Tourism industry**
tourism performance survey

**Visitors**
visitor satisfaction survey

**Environment**
environmental impact study

**Performance measurement**
against key DMP actions

# 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
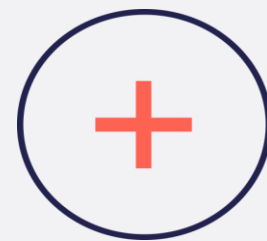across the island

**6**

**Enhancing the visitor
experience**
focusing on quality

# Strategic Priorities
## — PLUS

**+** **Crisis preparedness and civil protection**

**+** **Series of enabling programmes and actions, to support delivery of all priorities**

# D DMP FRAMEWORK

## 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).*

BUSINESSES

ENVIRONMENT

VISITORS

COMMUNITIES

VISION

All-year-round sustainable destination

Exceptional visitor experiencese

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

- **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

**1** Undiscovered Gems

**2** Landscape Variety

**3** Cultural Diversity

**4** Colossal Characters

**5** Active escape

**5** Sun and sea +

**D** DMP FRAMEWORK
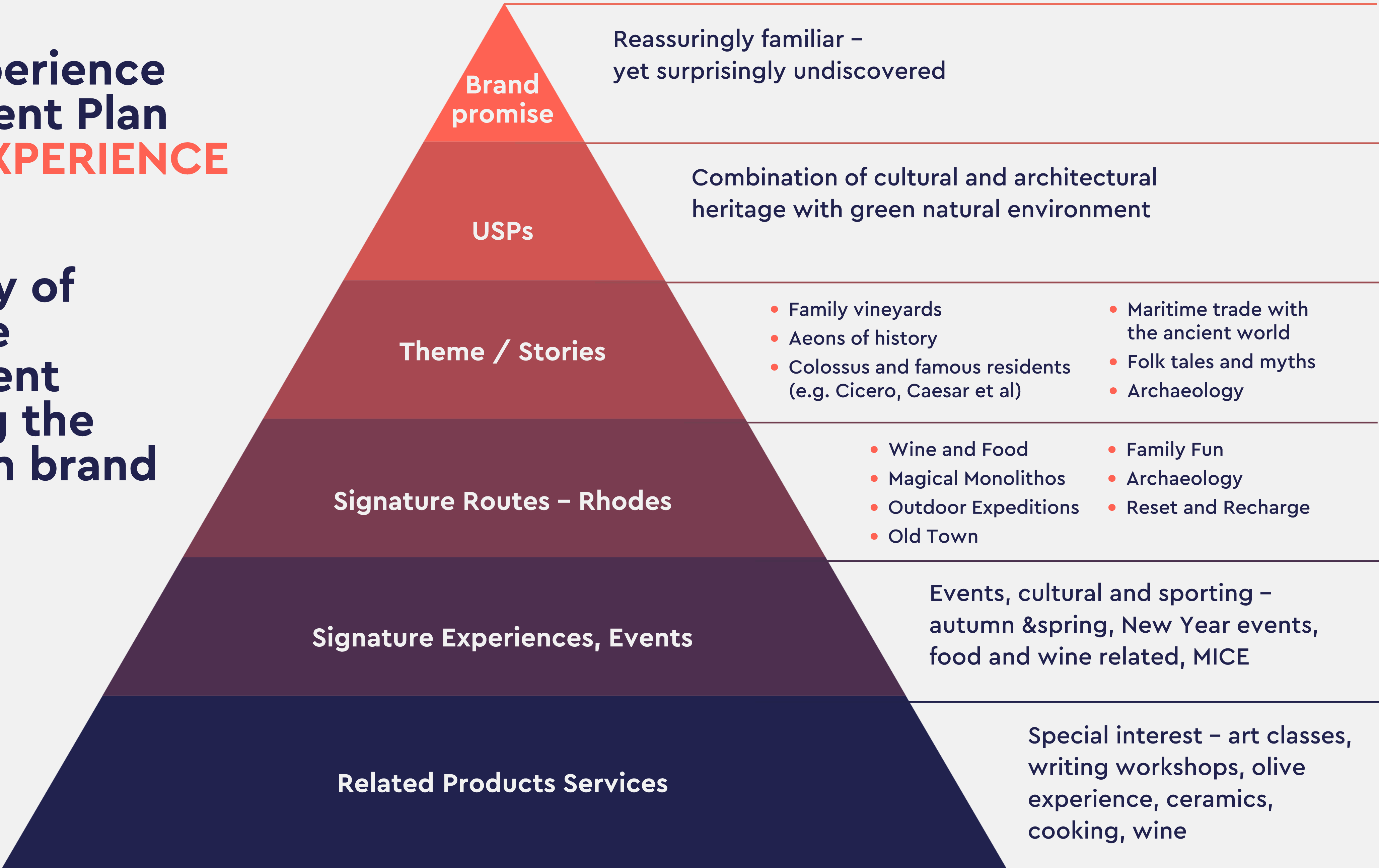
# Visitor Experience Development Plan
## VISITOR EXPERIENCE PYRAMID

## A hierarchy of experience development supporting the destination brand

**Brand promise** — Reassuringly familiar – yet surprisingly undiscovered

**USPs** — Combination of cultural and architectural heritage with green natural environment

**Theme / Stories**
- Family vineyards
- Aeons of history
- Colossus and famous residents (e.g. Cicero, Caesar et al)
- Maritime trade with the ancient world
- Folk tales and myths
- Archaeology

**Signature Routes – Rhodes**
- Wine and Food
- Magical Monolithos
- Outdoor Expeditions
- Old Town
- Family Fun
- Archaeology
- Reset and Recharge

**Signature Experiences, Events** — Events, cultural and sporting – autumn &spring, New Year events, food and wine related, MICE

**Related Products Services** — Special interest – art classes, writing workshops, olive experience, ceramics, cooking, wine

# Strategic Priority #1 EXAMPLE: DUBROVNIK

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

**PRIORITY**

✓ **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.)

**PRIORITY**

## 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.



Istra Gourmet

# 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 | | Role for the Region | |
|---|---|---|---|
| • 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<br><br>• Termination of the activity of the non-profit Cyclades Progress & Development Organization | • A leading role for the Region of Aegean mainly through its Development Agency – "ENERGIAKI S.A."?<br><br>• 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

CITY OF ATHENS

SETE

AEGEAN
A STAR ALLIANCE MEMBER

ATHENS
INTERNATIONAL AIRPORT

# Challenges in Preparing a DMP

**Time frame**
6 months min.

**Stakeholder participation and buy-in**

**Stakeholder availability**

# 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

E

# THE DESTINATION MANAGEMENG PLANNING GUIDE

# Objectives of the Guide

Explain role and value of destination management planning

Encourage destinations throughout Greece to develop DMPs
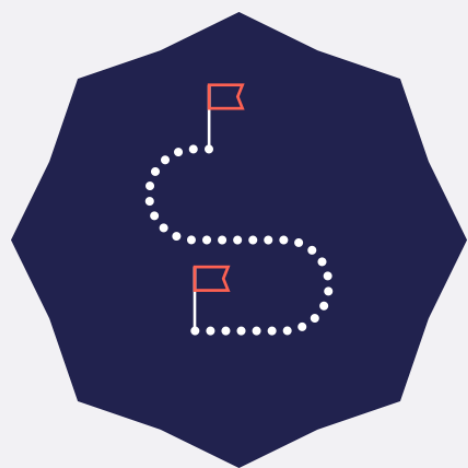
Explain the process for developing a DMP

Identify potential challenges in developing a DMP

Inspire confidence in developing a DMP through a clear step-by-step approach

TOPOSOPHY
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# 2.THE WORK PROGRAMME
for Preparing a Destination Management Plan

## 2.1
**Outline Work Programme**

## 2.2
**Briefing and Inception Meeting**

## 2.3
**Desk Research**

## 2.4
**Communication and Consultations**

## 2.5
**Primary Research**

## 2.6
**Situation Analysis Report**

## 2.7
**Plan Development**

# 3.STRUCTURE, CONTENT AND KEY COMPONENTS
of a Destination Management Plan

## 3.1
Outline Structure

## 3.2
Strategic Aim, Vision and Objectives

## 3.3
Strategic Priorities and Action Plan

## 3.4
Marketing Plan

## 3.5
Visitor Experience and Product Development

## 3.6
Monitoring

## 3.7
Governance Options for DMP Implementation

## 3.8
Destination Insights

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# LIST OF CONTENTS

## ANEXES

**F**

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

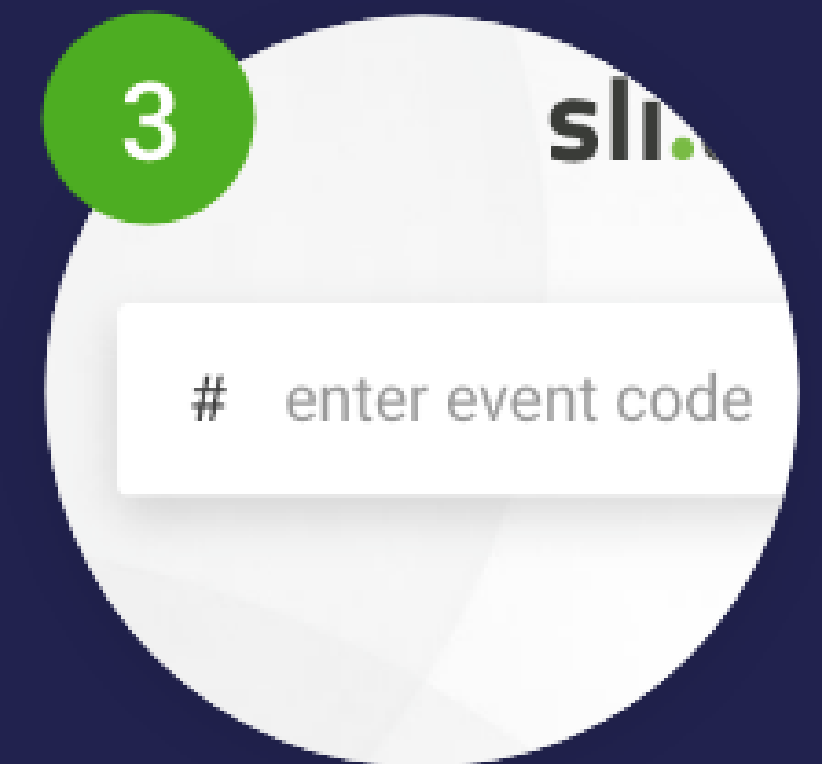# SELECTION OF ISSUES FOR DISCUSSION

# Join the conversation
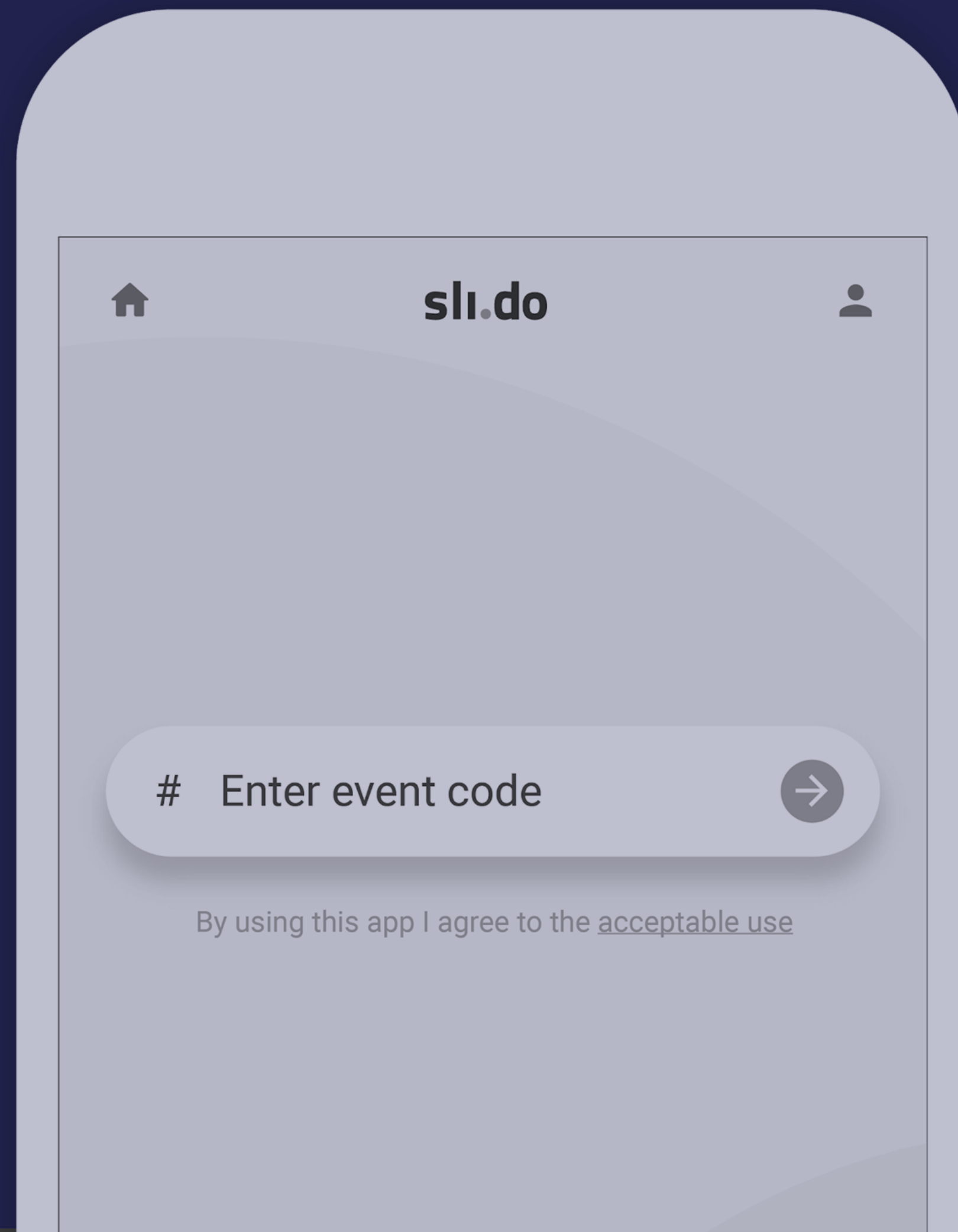## Chamber of Corfu_Ground Floor / userX

**1** Open browser

**2** Go to slido.com

**3** Enter event code

# Join the conversation
## Chamber of Corfu_Ground Floor, userX

**sli.do**

\# Enter event code →

By using this app I agree to the acceptable use

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# #Kerkyradmp

# Basic Ingredients

- Brand image
- Challenges
- Main markets

- Main competitors
- Vision
- Strategic priorities
- Governance

- SWOT
- Objectives
- Visitor products/ experiences

H

INTERACTIVE DISCUSSION OF 'KEY ISSUES'

CONCLUSIONS AND Q & A

# THANK YOU!