



DESTINATION DEVELOPMENT AND INSTITUTIONALIZATION STRATEGIES IN THE OIC MEMBER COUNTRIES

Global Trends, Approaches and Success Factors



11th Meeting of the COMCEC Tourism Working Group

February 15th, 2018
Ankara, Turkey

Presented by:
DinarStandard

Agenda

DESTINATION DEVELOPMENT AND INSTITUTIONALIZATION STRATEGIES: Global Trends, Approaches and Success Factors

- 1. Research Methodology**
- 2. Features of Potential Tourism Destinations**
- 3. Institutional Strategies**
- 4. Product Development Strategies**

Methodology

Primary and secondary research tools

Primary Research

- 27 in-depth interviews
- 31 online structured interviews
- Case studies (4)

8 Case Studies

4 Desk based

4 Field Visits

1 OIC
country

3 non-OIC
countries

3 OIC
countries

1 non-OIC
country

Study insights, analysis, recommendations

Secondary Research

- Case Studies (4)
- Global tourism industry reports
- Academic research papers
- Trade and Sector Reports
- Research studies on DMOs
- Government data
- International Organizations publications (UNWTO, UNESCO, WTTC, the World Bank, OECD)

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Features of Potential Tourism Destinations

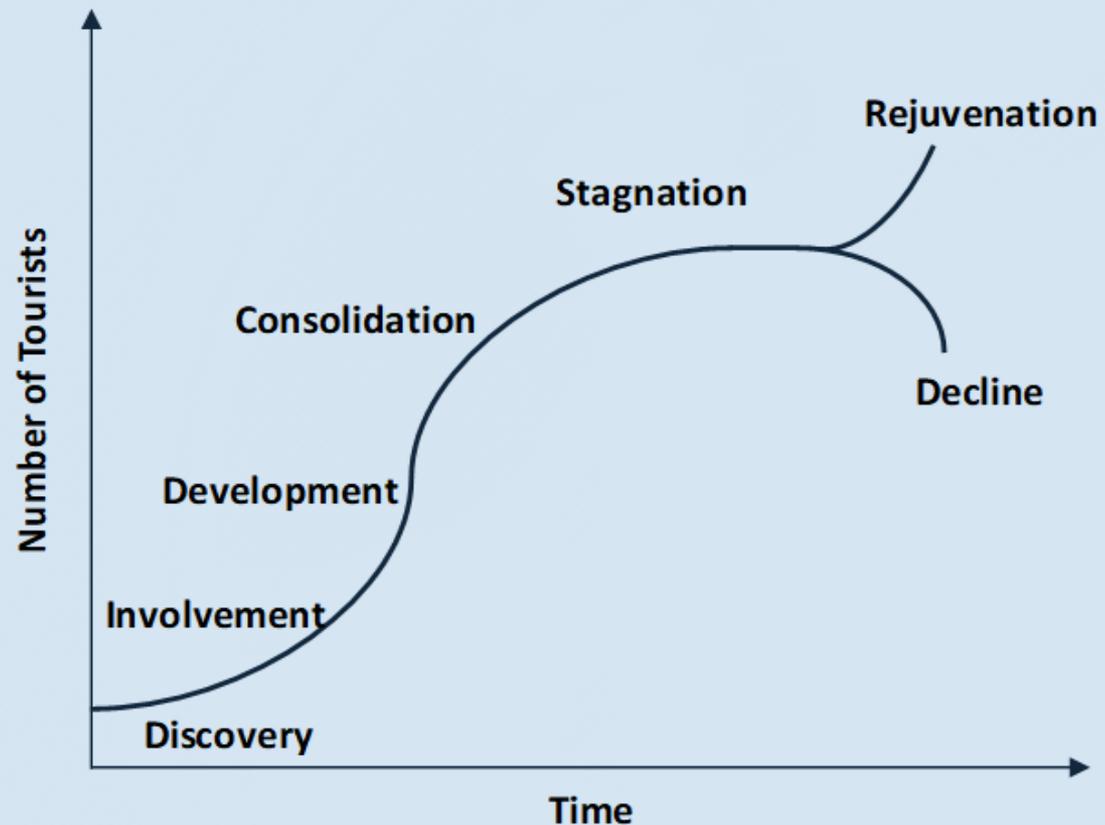
Destination Life Cycle

Types

Lifecycle

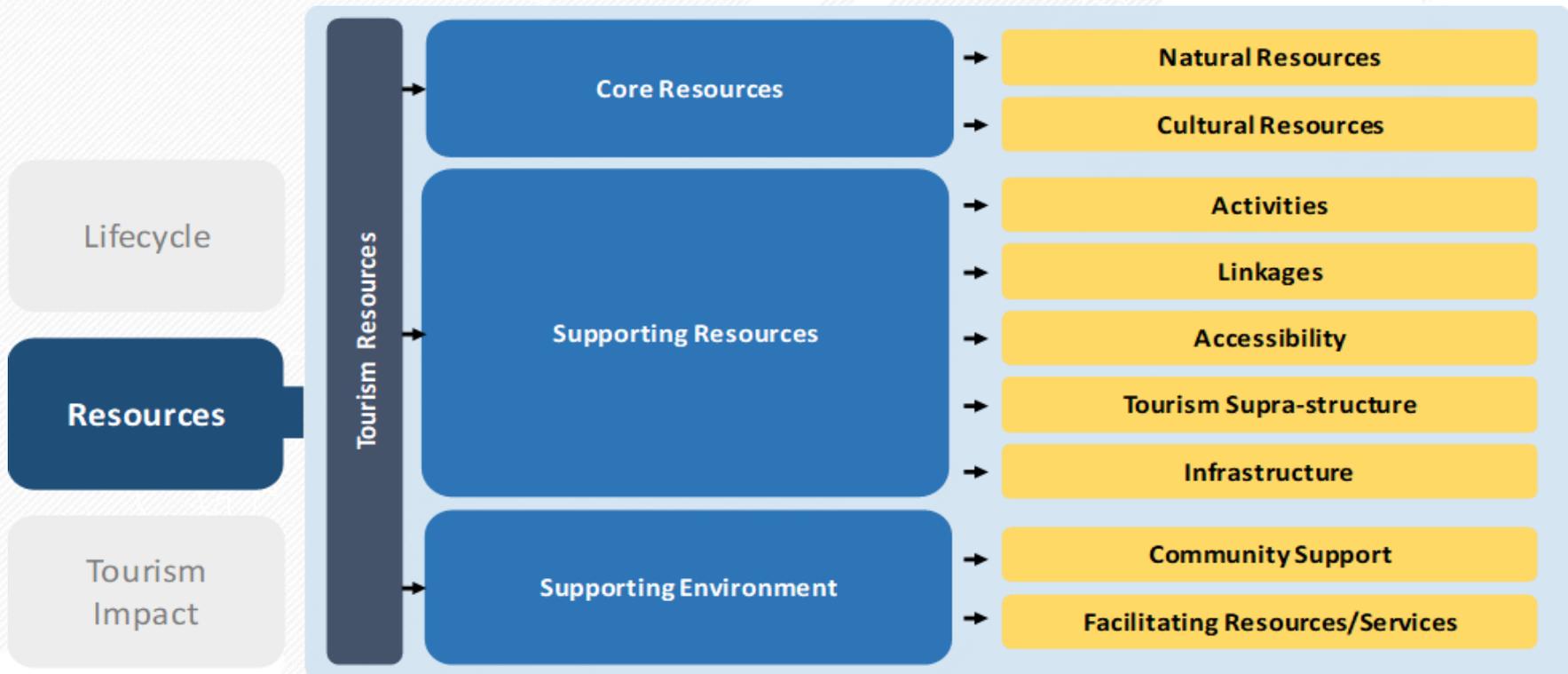
Resources

Tourism Impact



Features of Potential Tourism Destinations

Tourism Resources



Features of Potential Tourism Destinations

Impact of Tourism

Tourism direct contribution to global economy - 2016
\$2.3 trillion*

Indirect contribution - 2016
\$7.6 trillion*

Tourism Jobs - 2016
\$1.9 million*



*Source: WTTC's Travel & Tourism Economic Impact 2017

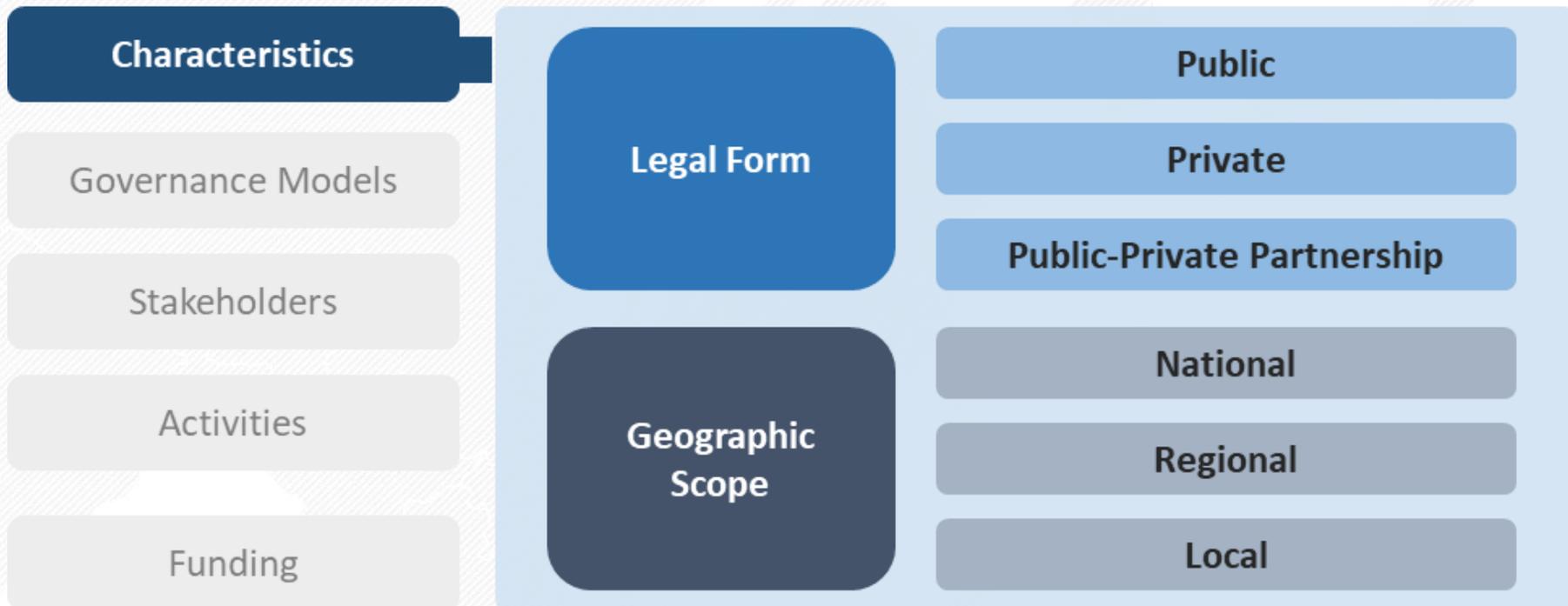
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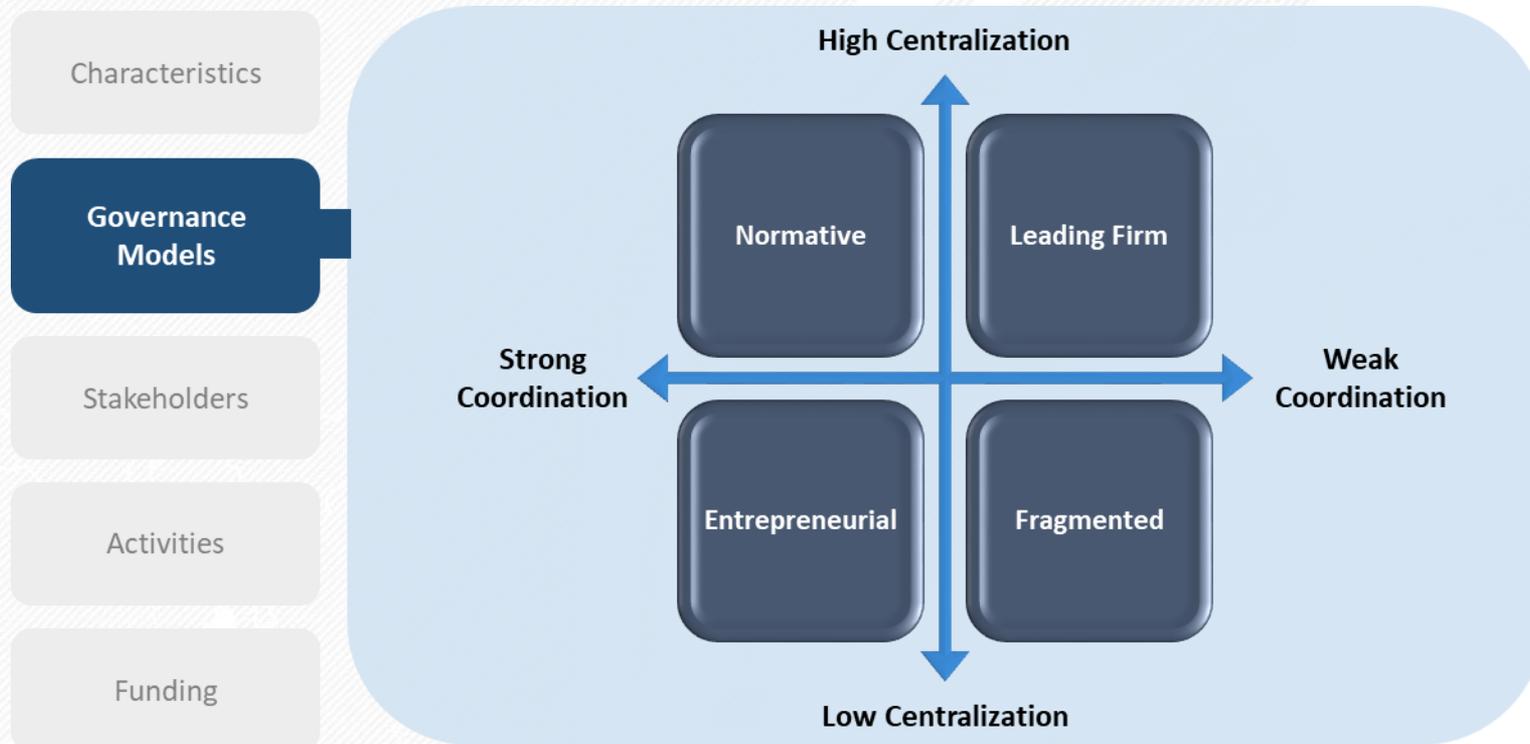
Institutional Strategies

DMO Characteristics



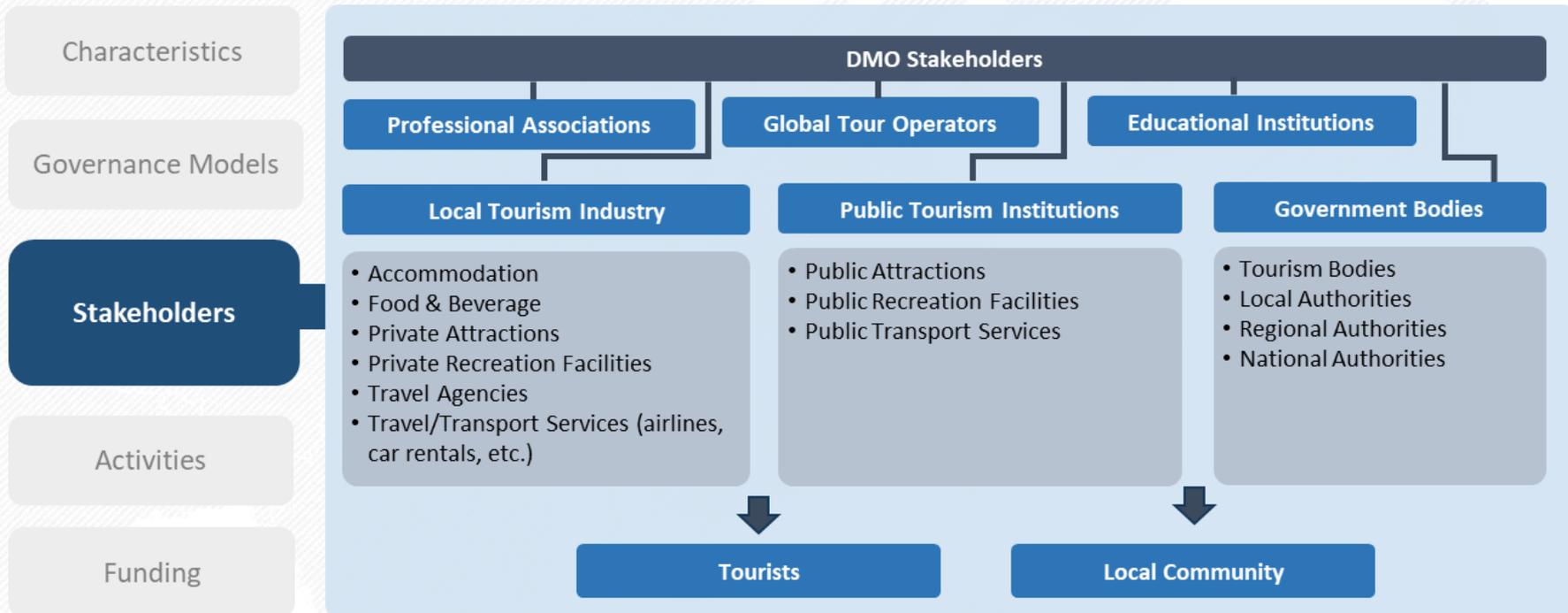
Institutional Strategies

Governance Models



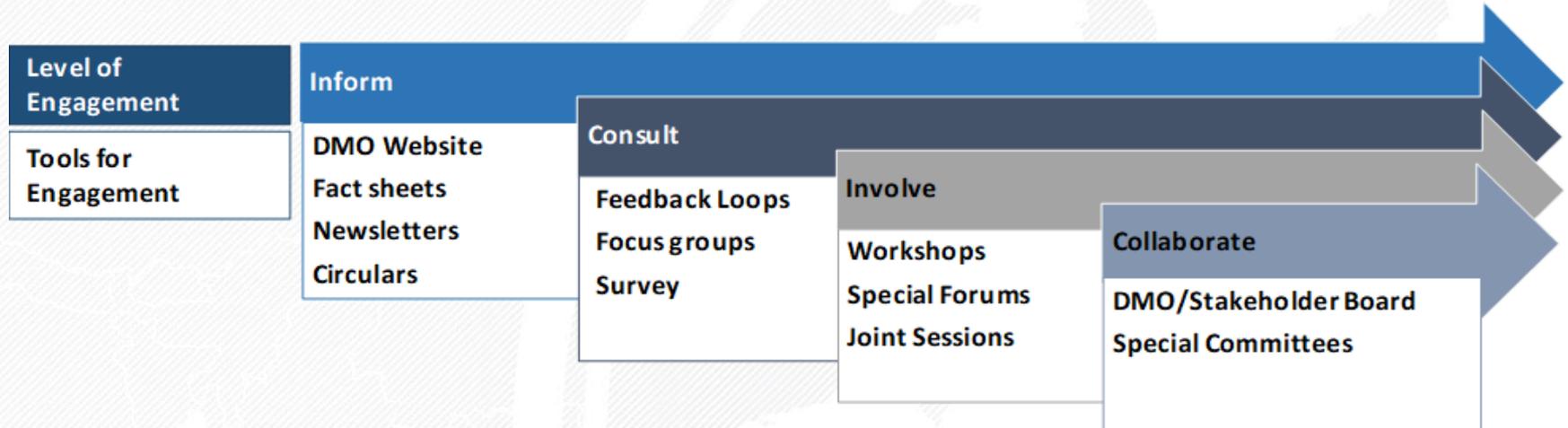
Institutional Strategies

DMO Stakeholders



Institutional Strategies

Stakeholder Engagement Levels & Tools



Institutional Strategies

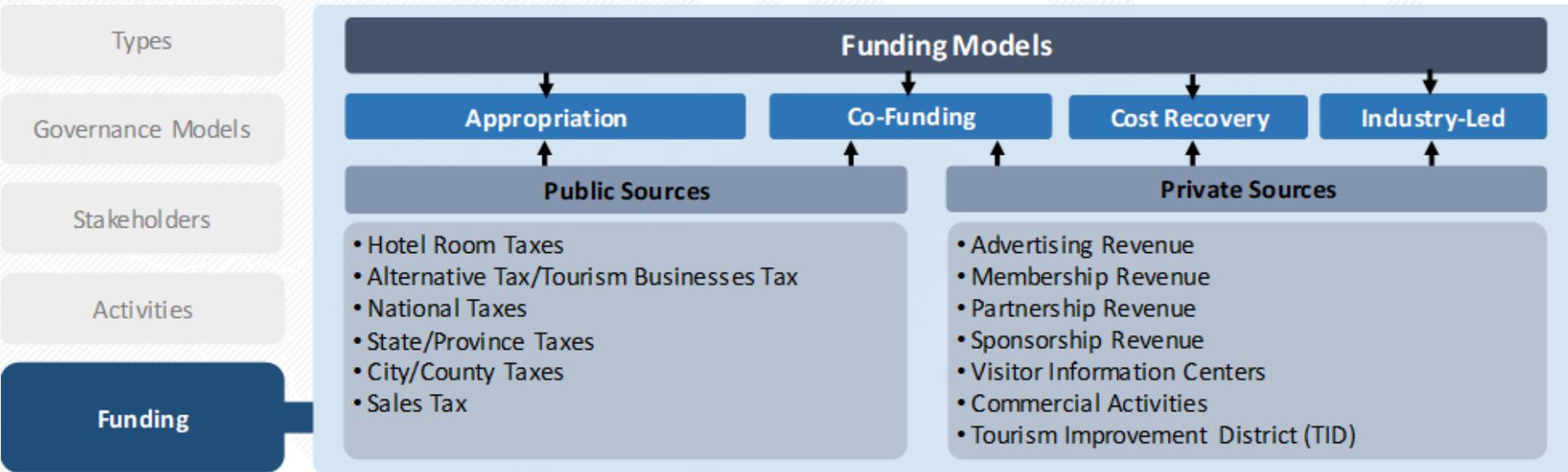
The Role of the DMO

DMO Activities



Institutional Strategies

DMO Funding Models



Institutional Strategies

DMO Key Performance Indicators

Measurement Approach/Model	KPI	Measurement
Visitor Metrics	Visit Statistics	Number of Visitors Average Length of Stay Tourist Spending
	ROI	Ratio of Visitor Spending to DMO Spending
Marketing Communications	Activity	Number of Programs/Campaigns Total Reach, Total Frequency
	Performance	Advertising Awareness Brand Image Changes
	Productivity	Conversion Rates Cost-per-Conversion Rate Return on Investment
Consumer-Based Brand Equity (CBBE)	Brand Salience	Top of Mind
	Brand Associations	Cognitive Attributes, Affective perceptions
	Brand Resonance	Previous Visits Intent to Visit
	Brand Loyalty	Repeat Visits Word of Mouth Referrals

Institutional Strategies

DMO Key Performance Indicators

Measurement Approach/Model	KPI	Measurement
Organizational Effectiveness	Appropriateness of Objectives	Clarity of Objectives Feasibility of Objectives
	Achievement of Objectives	Progress towards Objectives
	Implementation Efficiency	Efficient Resource Allocation Cost-effectiveness
Stakeholder	Tourist Evaluation	Satisfaction with Access to Services Satisfaction with Accommodation Satisfaction with Transport
	Local Industry Evaluation	Satisfaction with Destination Promotion Satisfaction with Industry Support
	Local Community Evaluation	Satisfaction with Quality of Life

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Product Development Strategies

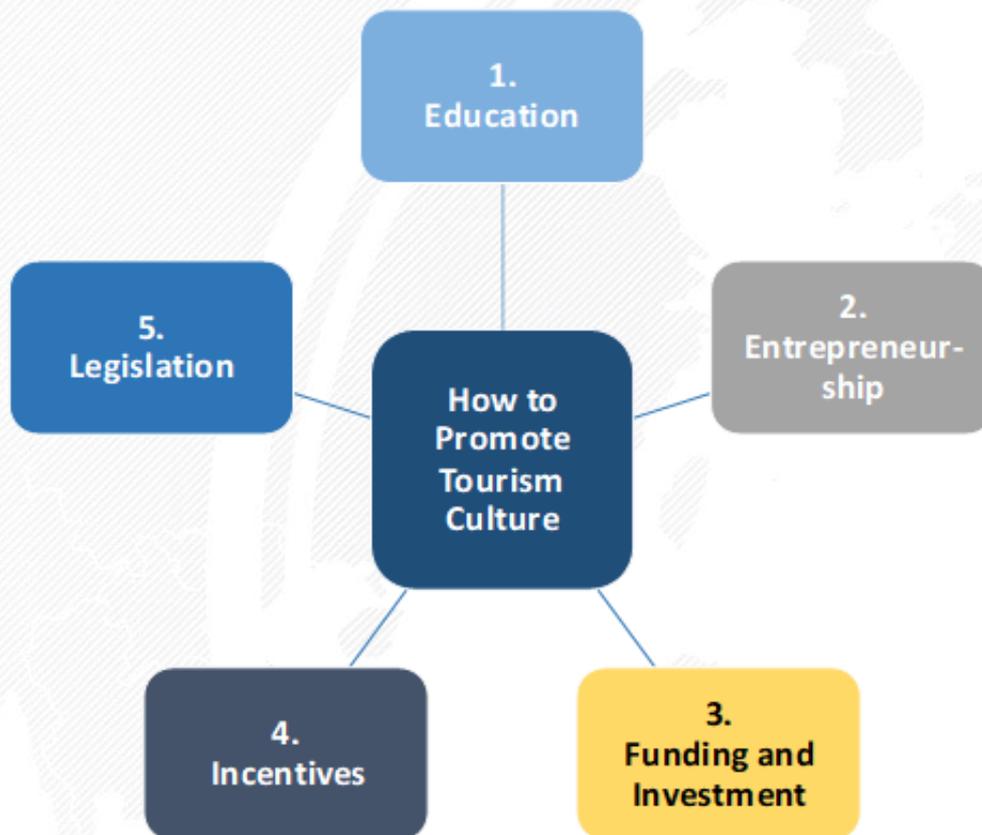
Product Development Process



Product Development Strategies

Supporting Resources

Step 4: Engage with the Community to develop a tourism culture



Product Development Strategies

Supporting Resources

Step 5: Activating Destination Product Development Strategies

Creating Incentives for Investment

Examples:

- Reduced taxes (income and property)
- Reduced operational costs
- Reduced customs
- Reduced infrastructure costs
- Reduced regulatory fees
- Reduced real estate costs

Facilitating Legislative Change

Examples. Legislation relating to:

- Zoning laws
- Licenses, certification and approvals
- Land use and ownership
- Imports
- Taxes and customs
- Foreign Exchange rates
- Tourism infrastructure requirements
- Environmental sustainability
- Capital raising requirements

Contact

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We look forward to hearing from you.

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