

TRABAJO DE FIN DE MÁSTER

(MASTER THESIS)

The role of Destination Management Organizations and Tourism Observatories.
Evidence from INSTO - UNWTO and lessons for the Canary Islands

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Abstract:

This Final Master's Project is about the functions of the Destination Management Organizations and Tourism Observatories, and give some examples of cases who joined the INSTO - UNWTO, making special emphasis on the case of the Canary Islands, whose aim is to enter this network but is still is facing a number of challenges. An analysis of some essential terms is made to understand the existence of Destination Management Organization and Tourism Observatories, and after considering all the necessary requirements for success it is concluded that the Canary Islands, despite having outstanding tools for tourism management and monitoring, must improve in its tourism governance.

Key words: DMO, Tourism Observatory, Governance, UNWTO, Canary Islands

Resumen:

Este Trabajo Fin de Máster trata sobre las funciones de las Organizaciones de Gestión de Destinos y los Observatorios Turísticos, y da algunos ejemplos de casos que se incorporaron a la red de observatorios INSTO - UNWTO, haciendo especial hincapié en el caso de Canarias, cuyo objetivo es entrar en esta red pero todavía se enfrenta a una serie de desafíos. Se hace un análisis de algunos términos imprescindibles para entender la existencia de las Organizaciones de Gestión de Destinos y Observatorios Turísticos, y tras considerar todos los requisitos necesarios para el éxito se concluye que Canarias, a pesar de contar con destacadas herramientas de gestión y seguimiento turístico, debe mejorar en su gobernanza turística.

Palabras clave: Organizaciones de gestión de destinos, Observatorios turísticos, gobernanza, OMT, Islas Canarias

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1. Introduction

This Final Master's Project starts with a brief review of the tourism bibliography in terms of governance, destination management organizations and their functionalities, types as well as its link to tourism intelligence. A search has been made for documents of different researchers and authors published in prestigious scientific journals, such as *Tourism Management*, *Annals of Tourism Research* or *Journal of Travel Research* to start from a theoretical base. Then emphasis will be placed on the International Network of Sustainable Tourism Observatories (INSTO) of the United Nations World Tourism Organization (UNWTO), looking at some cases of destinations which joined and then explaining the case of the Canary Islands, whose objective is to enter this network. Some difficulties and challenges that the Canary Islands Tourist Observatory must face will be presented, as well as using some tools of SWOT analysis of the Observatory. Finally, as we are in the midst of the global Covid-19 pandemic, there will be a section in which some opportunities that can be taken advantage of this crisis will be explained from an optimistic perspective.

It is important to understand the journey of this Final Master Project, which begins with the definition of a tourist destination, reaching the conclusion that they are complex ecosystems. As in any ecosystem, in the tourism ecosystem many agents or stakeholders participate, who are obliged to coordinate and cooperate under governance for the destination to be successful. A fundamental requirement to coordinate a destination are Destination Management Organizations (DMOs), which are the entities responsible for managing a destination. DMOs have several functions as well as there are different types. There are DMOs at different administrative levels, DMOs that include the presence of the government and others that do not, DMOs that only focus on Destination Marketing while others also fulfill many other tasks, etc. It will always depend on the composition of the tourist destination and its needs. It is also worth mentioning that a DMO can be seen as an intelligent agent when the presence of technology for data analysis is included. A smart DMO is capable of bringing the destination stakeholders to build a knowledge network to become a smart destination but not only to improve the experience of tourists who visit the destination but also for their own benefit optimizing their resources and being sustainable. When analyzing data, the Tourism Observatories come into play, which are mostly a department of the DMO and are in charge of monitoring the tourism by collecting a wide range of information, data and analysis methods for the current trends in the tourism industry, to provide them to stakeholders and the government to help in decision making. Following this idea, UNWTO creates a network of observatories whose members are provided with key tools to strengthen institutional capacity to support the development and implementation of sustainable tourism policies, strategies, plans and management procedures. The Canary Islands, as a peculiar destination, is currently facing a number of challenges in its tourism management and monitoring process but it is determined to be part of this network. Conclusion is that the Tourism Observatory of the Canary Islands, despite being a reference tourist destination, still has many pending aspects in which it could improve even obtaining as a reference the experiences of other destinations that are part of the INSTO UNWTO network.

2. Destination ecosystems and governance

This section will explain what a tourist destination is as well as what its composition is. Then the term of governance will be explained, an essential requirement for the proper functioning of a tourist destination.

2.1. Destination ecosystems

Bornhorst et al. (2010) define a tourism destination as "a geographical region, political jurisdiction, or major attraction, which seeks to provide visitors with a range of satisfying to memorable visitation experiences" (p.552). According to these authors, a tourist destination is defined by the degree of experience that the tourist obtains when visiting the destination, often coinciding with political or geographical limits, that is, a destination can be an entire country, a province, an island, a city, etc. But when an experience or set of experiences in a certain place is very significant for visitors, that place or attraction is also considered a destination. An example may be an amusement park, since the level of experience that it is capable to provide to visitors is able to compete with the set of experiences that can be obtained in a city, for example.

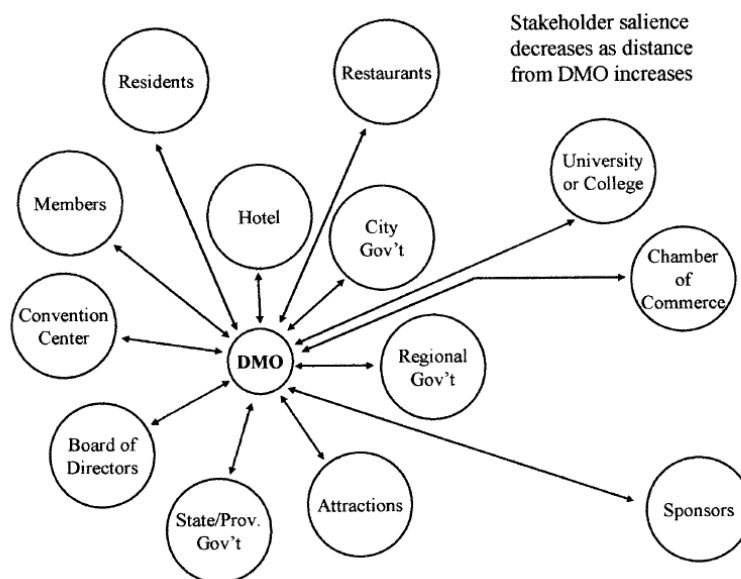
In a destination there are many factors involved and also related, so the term "tourist ecosystem" is often used. According to the Royal Spanish Academy, an ecosystem is "a community of living beings whose life processes are related to each other and develop according to the physical factors of the same environment." Boley and Chang (2007) mention four characteristics of an ecosystem: interaction and engagement, balance, loosely coupled actors with shared objectives and self-organization. These characteristics are perfectly applicable to the tourism sector, but instead of living beings we speak of other agents involved such as producers, consumers, distributors, government bodies, etc. being some examples the tourist companies, the tourists, the tour operators and the city councils, respectively (Gretzel et al., 2015).

According to Gretzel et al. (2015) a characteristic that especially defines the tourist ecosystem is the immense amount of microorganisms, that is, agents involved or destination stakeholders. The term "destination" refers to an ecosystem based on tourism that may even overlap with other ecosystems, which as an example, the residential one. Each destination, therefore, is considered an independent ecosystem in which many agents participate who are also independent but who must work in coordination and collaborate with each other.

When talking about stakeholders, following Sheehan and Ritchie (2005), there are many definitions from different authors which are very varied, as it depends on where the limits are set. Freeman (1984) defines a stakeholder as "any group or individual who can affect, or is affected by, the achievement of a corporation's purpose", while Cochran (1994) defines stakeholders according to if there are any economic links to the organization. Savage et al. (1991) discuss that it is important to understand the potential of each stakeholder to threaten the organization. The ability, opportunity, and willingness to do so are assumed to be a function of the player's relative ability and its relevance to the particular problem being addressed. Under the concepts of Savage et al. (1991), Sheehan and Ritchie (2005) identified 32 different stakeholder groups of destination management organizations. The term destination management organization (DMO)

refers to an organizational entity which is responsible, as the words say, for managing a destination, but this concept will be explained in more detail below.

Figure 1. Destination stakeholders



Source: Sheehan and Ritchie (2005)

Figure 1 shows the most relevant stakeholders of DMOs, ordered by importance. According to the study made by Sheehan and Ritchie (2005), hotels/hotel associations seem to be the most important DMO stakeholder group for more than half of the DMOs. Other important stakeholders were city/local government, regional/county government, attractions/attraction associations, and state/provincial tourism departments, etc, ordered from highest to lowest importance.

2.2. Governance

The concept of governance has existed since Ancient Greece but in the 80s it was when it regained importance, being used by the media as a concept to explain the changes that were being perceived in the different forms of political action. Duran (2013) explains the concept of governance from two perspectives. First, as a normative concept, where it exposes the definitions developed by international institutions such as the World Bank (WB), the United Nations Development Program (UNDP) or the Commission of the European Communities (CEC), based on individual perspective and experience of each organization to describe the model of government that its member countries should adopt when developing a policy (see Annex 1). On the other hand, it explains governance as a theoretical concept, where changes in the way of governing can be identified as a result of social, economic and technological transformations at the end of the 20th century. During this time, it was a real challenge for governments to face the problems of these changes on their own.

Following Duran (2013), many authors such as Rhodes (2005), Kooiman (2003) and Mayntz (2001), agree that governance is not the same as government, but, governance goes far beyond government. Therefore, governance encompasses new forms of

association and coordination between the government and private and social organizations, as well as greater decision-making (Kooiman, 2003), capacity and influence for non-governmental actors in the direction and mechanics of public policy and in the management of public issues (Mayntz, 2001). The government, from this perspective, is the center of the network for interactions, interdependence and cooperation between governmental, private and social actors. But also, as a process of orientation for the achievement of collective objectives, governance is a concept that necessarily alludes to normative aspects. As Peters (2007) indicates, instruments are required to identify what society wants to be done; the means to achieve collective objectives and mechanisms to resolve conflicts of interest, assuming that there is more than a limited range of objectives pursued by individual actors (Peters, 2007).

According to Duran (2013) and taking into account these authors mentioned above, “governance involves a guidance process that is institutionally and technically structured, that is, based on principles, norms, procedures and practices to collectively decide about common goals for coexistence and about how to coordinate and cooperate for the achievement of decided objectives” (Duran, 2013, p.9).

2.3. Governance in tourism

According to Jamal and Getz (1995), no actor can practise direct control over a destination’s development because every actor in the tourism sector has a certain degree of power, resources and access to networks. Therefore, collaboration between these actors is often crucial for the government to achieve its collective goals. Consequently, governance is often seen as involving governmental and non-governmental actors working together, to ensure collective goals or social order (Rhodes, 1996).

Duran (2013) defines governance in the tourism sector as the following: “Governance is a practice of government that is measurable, that is aimed to effectively direct the tourism sectors at the different levels of government through forms of coordination, collaboration and/or cooperation that are efficient, transparent and subject to accountability, that help to achieve goals of collective interest shared by networks of actors involved in the sector, with the aim of developing solutions and opportunities through agreements based on the recognition of interdependencies and shared responsibilities.” (p.14). According to this definition, it is not assumed that governance simply exists, but that a government must have an adequate will and ability to practice coordination, collaboration and cooperation among the networks of actors so that they participate in the objectives of general interest.

In summary, the tourist ecosystem is a very complex system in which many actors of various types and natures participate, who must coordinate and cooperate under governance so that there is an adequate development of tourism in which no party involved leaves disadvantaged.

3. Destination Management Organizations

As we have seen, many actors participate in the tourist ecosystem and it is very complex, so its coordination can be somewhat complicated. This act of coordination is called destination management and the UNWTO (2007) defines it as “the coordinated

management of all the elements that make up a tourism destination (attractions, amenities, access, marketing and pricing)". Arriving on this point, the Destination Management Organizations (DMO) play an important role, since they are the ones in charge of this task. The Committee on Tourism and Competitiveness (CTC) defines a DMO as "the leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates partnerships towards a collective destination vision".

3.1. Functions

In the past, the role of DMOs has been to take charge of the destination marketing (Destination Marketing Organizations), but their role has evolved over time, since tourism is a very dynamic sector. Despite the fact that many current authors such as Dore and Crouch (2003) acknowledge that marketing is still the main scope of a DMO, it is increasingly recognized that the role of DMO goes beyond marketing, including other activities that are important to the success of tourism in a competitive destination, so that the marketing "M" in the DMO acronym has been replaced by management (Pike and Page, 2014). Its responsibilities are getting wider and wider: to become a strategic leader in destination planning and management. This is an important factor for success in every tourist destination even many destinations now have DMOs to lead the way.

Today, there are many different roles and responsibilities in destination management. These are handled in different ways at different destinations, but some common elements and methods can be found in most existing DMOs. Some of the fundamental DMO's functions include: Strategic planning, Formulation (or participation in the formulation process) and implementation of the destination's tourism policy, Market intelligence (data gathering and analysis, market research, etc.), Tourism product and business development, Digitalization and innovation, Monitoring, Crisis management, Training and capacity building (not only of its human resources but also facilitate training and capacity building activities for local tourism professionals), Promotion, marketing and branding, Funding and fostering investments, etc (UNWTO, 2019).

Morrison et al. (1998) list five primary functions of a DMO.

1. The "economic driver" that generates new income, employment and taxes, and promotes the diversification of the local economy.
2. As "Community marketer" informing about the most suitable destination image, attractions and facilities to selected tourist markets.
3. As "Industry coordinator" providing clear focus and encouraging the reduction of industry differentiation in order to share the growing benefits of the tourism industry.
4. As "Quasi-Public Representative" increasing the legitimacy of the industry and protecting individual and group tourists.
5. As "community pride builder" by improving the quality of life and acting as the main "flag carrier" for residents and visitors.

Presenza et al. (2005) classifies the DMO activities into two important functions: external destination marketing and development of internal destiny. On one hand, the external destination marketing function aims to include all specific activities to attract tourists to their destinations. Specific activities should be as complete and concise as possible. After developing a marketing plan, DMOs can use different promotional tools, such as personal sales, direct marketing, advertising, sales promotion, advertising, and public relations. Usual activities include attending trade shows, exhibitions and events, tours for meeting and incentive planners and travel writers, telephone call centers and tourist information kiosks. Therefore, these activities are an external orientation in a certain sense because their purpose is to influence the behavior of people outside the destination. On the other hand, the Internal Destination Development may be considered to include all other forms of activities that DMO does to develop and maintain the tourist industry of the destination that are not marketing. In this case the function of destination development is internal, because activities are planned internally for the objective. Many activities require the actions and resources of other target stakeholders, so in these areas, DMO primarily helps coordinate resource deployment, rather than implementing its own resources.

Heath and Wall (1992) proposed that DMO can accomplish four tasks, namely formulating strategies, representing stakeholder interests, developing products and marketing. While performing these functions, sustainable resource planning must be carried out (Gill and Williams, 1994), with an emphasis on quality assessment and monitoring (Kozak, 2002). Responsible and sustainable destination management should include a process that effectively and harmoniously addresses interaction between tourists, industries that serve tourists, communities that host tourists, and the environment both natural and cultural resources in a broad sense (UNWTO 2019). Wray et al. (2010) listed the most important characteristics of successful and sustainable destination management: a long-term vision for destination development, a clear division of responsibilities and an appropriate operating structure, transparent and responsible decision-making participation in local interest groups.

Therefore, UNWTO (2019) proposes three Key Performance Areas (KPA) that are essential to work on for the DMO to have success: Strategic Leadership, Effective Execution and Efficient Governance.

- Strategic leadership means applying the efforts and energy of stakeholders to a collective vision, formulating strategies for realizing the vision, communicating and advocating the advantages and principles of effective tourism management, and promoting public-private partnerships, etc.
- Executive Execution means effectively implementing the relevant destination management responsibilities, and clarifying the role of DMO in other tourism organizations and the implementation of the agreed role of DMO.
- Effective governance of the destination management system includes providing the industry with awareness and guidance on quality and excellence, promoting sustainable and responsible tourism, and efficient and transparent corporate governance (such as financial, administrative and human resource practices, fast/flexible execution, Performance monitoring, evaluation, management, etc.).

To sum up, a DMO has many functions and responsibilities, which must be developed in an appropriate way and always taking into account the nature of the destination. The DMOs will have to assume new functions that will go far beyond the organization of tourist marketing campaigns and the attention to the visitor in the information offices. In a broad sense the function of DMOs is being a strategic instrument for the management of tourism in the destination, acting as catalyst and facilitator of the realization of tourism.

3.2. Classifications

There are numerous classifications of typologies made by the authors of the tourism literature regarding DMOs, however, firstly the basic ones will be explained and then the classifications regarding the DMOs business model and finally a descriptive model.

3.2.1. Traditional classifications

Reinhold et al. (2019) arranged the main ones in four groups, as classified by: level; activities, functions and competences; structure and governance; and revenue streams.

Among these classifications is the first one the most prominent referring to the classification of DMO types by level. National, regional and local levels are generally used to distinguish DMO according to the function and scale of its budget (Bieger et al., 2009). DMOs at the national level tend to focus on activities at the national level such as marketing the country as a whole. In contrast, regional and local DMOs focus on marketing and managing specific destinations such as a province, town, amusement park, or city. Traditionally, these destinations have been understood as administrative geographic restrictions, however, academics have begun to interpret the geographic scope of regions and local DMO activities in a more flexible way (Beritelli et al. 2014).

Secondly, the classification of DMO by activities, functions, and capabilities distinguishes between marketing and management tasks and is related to the regulatory role of DMO and the meaning of "M" in DMO (Pike and Page, 2014). In a recent review of DMO functions, Pearce (2015) identified 19 different DMO functions from the existing literature (see Annex 2), which specify activities related to marketing and management, and he refers to four manners to organize this functions:

1. Competence level (elementary or operational; intermediate level or functional; or upper level)
2. Statutory vs discretionary nature (whether the organization is mandated to perform specific functions, or the organization chooses to perform specific functions freely)
3. Enabling vs regulatory impact (those which encourage some activity or development and those which control or restrict it)
4. The relationship structure for units in charge of fulfilling certain functions (formal and tightly structured or informal and loose)

The third category of DMO is specifically for structure and governance. Flagestad and Hope (2001) described two main types of DMO, each of which is related to different organizational objective structures at both ends of the continuum. For community-type destinations, the author described the DMO as seen primarily as a marketing tool and policy area, where planning and decision-making are based on collaboration and

numerous stakeholder engagements. Instead for corporate destinations, DMO is (or belongs to) a multi-sector organization with central control, focusing on visitor processes and destination leadership (Flagestad and Hope, 2001). Wang (2011) supplemented these two extreme types by discussing four DMO governance models. Based on the Destination Marketing Association International, the author has identified four DMO models:

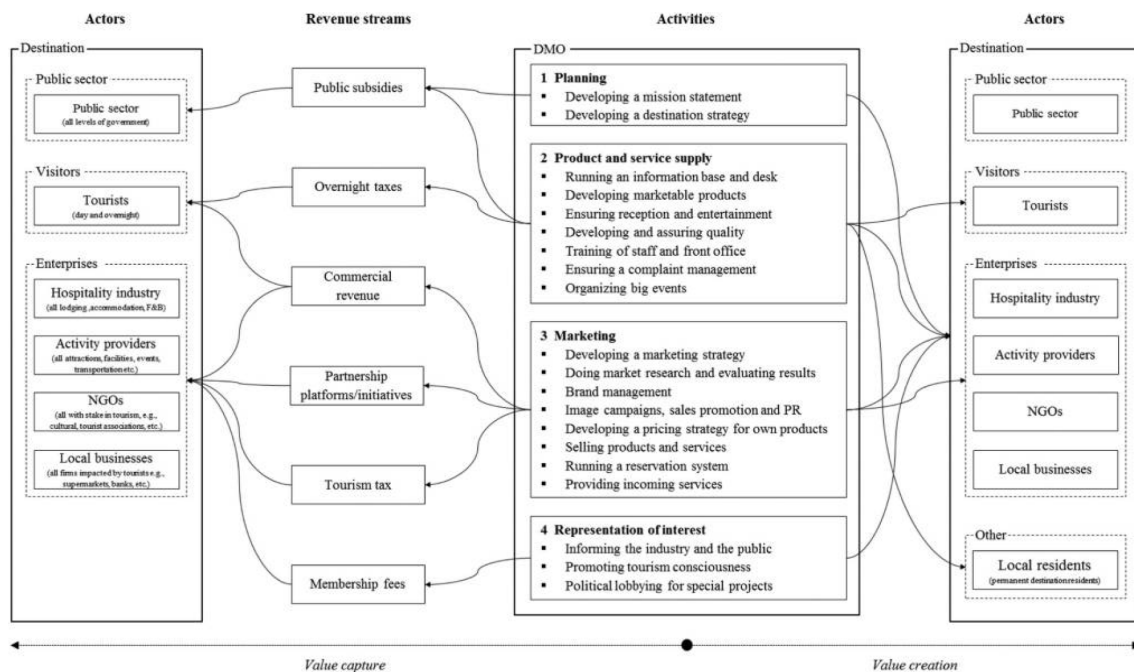
1. Public government agency
2. Government-funded, non-profit organization
3. Non-profit public private partnership
4. Private members-only trade association

The final classification group focuses on DMO's sources of income and funding. Beritelli and Laesser (2014) provide a detailed discussion of seven DMO revenue sources: Membership fees, partnership platforms/initiatives, business income, overnight tax, regional and state subsidies, municipal subsidies, and tourism tax.

3.2.2. Classification by business model typology

Another classification that can be made of the DMOs is taking into account its business model. Zott and Amit (2010) define a business model as “set of activities, as well as the resources and capabilities to perform them - either within the firm, or beyond it through cooperation with partners, suppliers or customers”. (p.217). The traditional business models of DMOs are a simple portrait of how they create and capture value. The DMO creates and captures value along three dimensions that are activities, actors and revenue streams. In *Figure 2* the Bieger (1998) traditional DMO business model can be observed:

Figure 2: Normative DMO Business Model



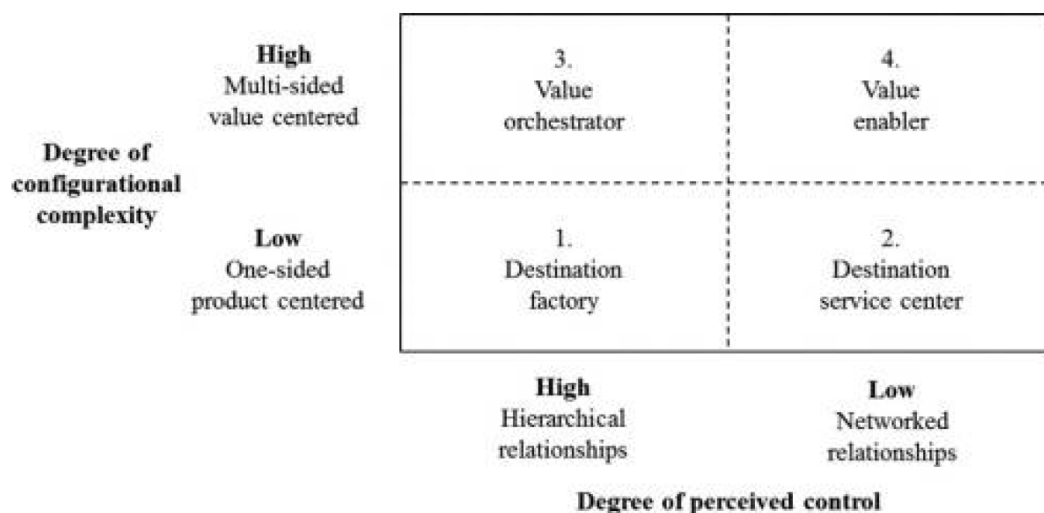
Source: Bieger (1998)

Activities, actors and revenue streams have a close relationship. When referring to the activities, Zott and Amit (2010) describes them as “the engagement of human, physical and/or capital resources of any party to the business model (the focal firm, end customers, vendors, etc.) to serve a specific purpose toward the fulfilment of the overall objective”. (p.217). Moreover the actors are all partners and customers (stakeholders) relevant to the transactions and finally the revenue streams represent how the value created from the activities realized by actors is appropriated and disseminated among the value network (Zott and Amit, 2010).

Regarding *Figure 3*, the activities are classified into 4 categories: planning, product development, marketing and representation of interest (Bieger, 1998). The planning activities will improve and support the execution of other activities, especially those related to marketing and product development. Thanks to planning activities, marketing strategies will be more efficient, increasing the number of visitors and therefore creating more value for the destination and experience at the same time. Therefore, both parts tourists and destination residents are the main beneficiaries of these activities. And finally, the visitor experience will be improved by adopting interest representing activities through resident and political support (Reinhold et al., 2018).

Reinhold et al. (2018) proposes a classification of the DMOs in terms of their business model. To make the classification he takes into account two dimensions: the configurational complexity and the perceived control. As we can see in *Figure 3*, on one hand, the degree of configurational complexity depends on if the DMO is multi-sided value centered (high complexity) or one-sided product centered (low complexity), being the criterion the coproduction of tourist experiences. On the other hand, the degree of perceived control depends on if the DMO has more hierarchical relationships (high control) or more networked relationships (low control).

Figure 3. DMO Business model typology



Source: Reinhold et al. (2018)

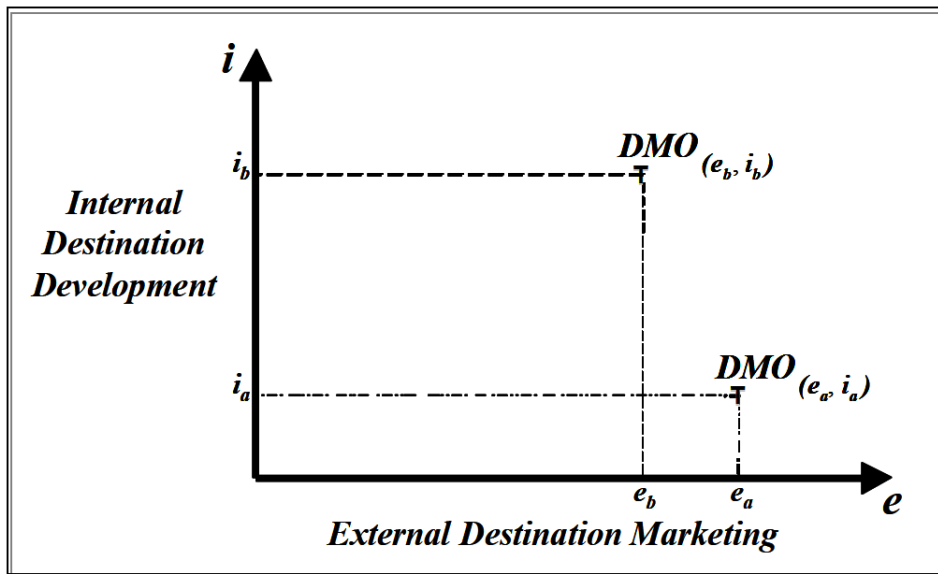
After seen the criteria used by Reinhold et al. (2018) to classify the DMOs according to its business model, we will proceed to see the four typologies exposed in *Figure 3* (Reinhold et al., 2018):

1. Destination Factory. This type describes a low-complexity with a high degree of control over the destination business model. This kind of DMO is in the hierarchical control of all strategies and operations related to the destination and formulates a destination strategy, develops tourism infrastructure, new products, promotes its destination, provides information, etc. In fact, the configuration of the business model is like the DMO were operating an integrated destination factory.
2. Destination service center. This type also involves low-complexity business model configuration, nevertheless, it assumes that DMO has little control over the target. They operate its one-sided product centered business model, focusing on supporting various business relationships through standardized product and service solutions. Like a service center for destination stakeholders, it supports specific marketing and product-related activities, however, this type of DMO is unlikely to develop new products or lead strategic processes.
3. Value orchestrator. This type represents a highly complex business model configuration, which assumes that the DMO has a high degree of control over the target. Otherwise from the Destination Factory, the value orchestrator starts designing the value proposition from the specific challenges of the target stakeholder although the relationship between strategy and objectives in the operation process is still controlled by DMO.
4. Value enabler. This last type is characterized by a high level of complexity with limited control over the destination as a productive system. The DMO runs a multilateral business model that focuses on achieving value created by target participants. DMO defines its value proposition based on the relevant challenges of these actors, focusing on establishing and maintaining value creation relationships between actors.

3.2.3. Descriptive model

Presenza et al. (2005) suggest a classification of DMO taking into account the classification of the activities of DMO in External Destination Marketing (EDM) or Internal Destination Development (IDD), explained above in the 3.1. Functions section. This model captures both dimensions EDM and IDD, to reflect overall destination management effort. Regarding *Figure 4* it can be observed that the vertical axis represents the Internal Destination Development activities while the horizontal axis represents the External Destination Marketing Activities done by the DMO.

Figure 4. Descriptive Model of Destination Management in Terms of DMO Efforts in Internal Destination Development and External Destination Marketing



Source: Presenza et al. (2005)

Therefore, DMO's position in the model is the result of its interaction in these two dimensions, and reflects its effort in destination management. If the DMO invests more effort in either of the two dimensions it will result in the total effort of the DMO to fully manage the entire destination (Presenza et al., 2005).

3.3. Smart tourism destinations and DMOs

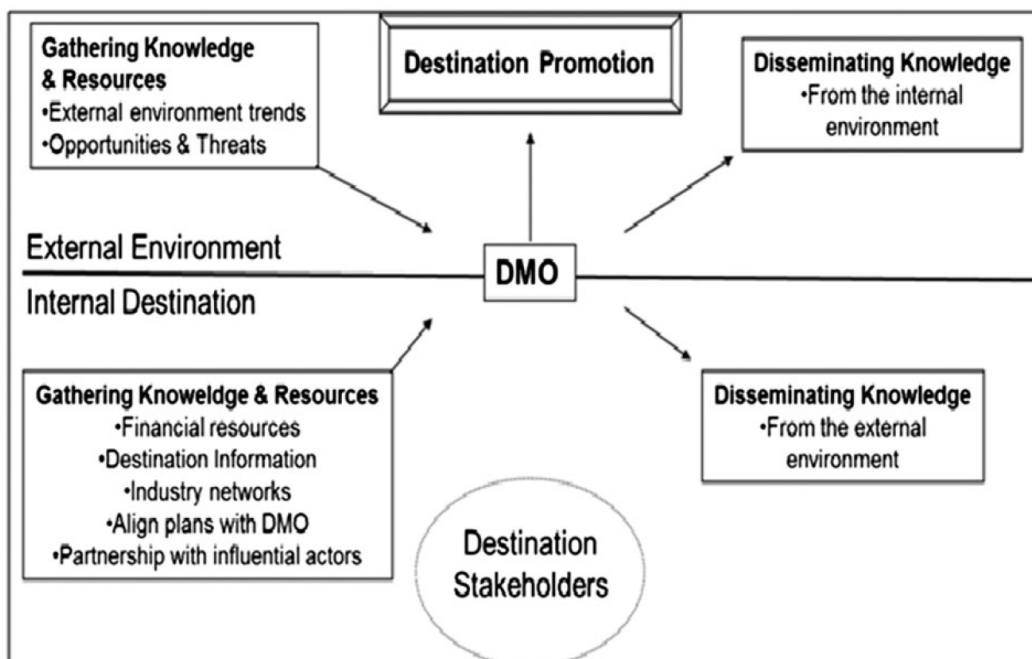
The fast development of technology has brought smartness to everyone, being "smart" a word that represents everything enhanced through technology. In recent years the concept of Smart City has become very popular, focusing on how to increase the quality of life of citizens through the use of information and communication technology. The concept of Smart Tourism Destinations originated from the development of smart cities, but differs from a smart city in that the latter seeks to benefit residents, while in the case of a smart destination the main beneficiary is the tourist. By applying intelligent concepts to meet travelers' needs before, during and after travel, destinations can increase their competitiveness (Buhalis and Amaranggana, 2014).

There are three forms of Information and Communications Technology which are vital for setting up Smart Tourism Destinations: Cloud Computing, Internet of Things and End User Internet Service System (Zhang et al., 2012). However, simply integrating technology into a tourist destination is not enough to become a smart tourist destination (Boes et al., 2016). The concept of smart destinations is a step forward in destination management, based on five pillars: governance, innovation, technology, accessibility, and sustainability. These five pillars and the interaction between them are the key points of converting a destination into smart, and the DMO is at the core of this conversion (UNWTO, 2019).

For the DMOs to become an intelligent agent who can build smart destinations and be successful, they need to be able to bring destination stakeholders to build a knowledge network that can quickly identify and respond to threats and opportunities in the external competitive environment (Sheehan et al., 2016).

Observing *Figure 5*, Sheehan et al. (2016) talk about two worlds in which DMOs operate: the internal destination environment and the external competitive environment. The key to success in these two worlds to become an intelligent DMO is the collection, analysis and dissemination of information, and the knowledge created by this information, being a boundary spanner between these two worlds. As to the internal environment of the destination, in the collection and creation of knowledge, Sheehan et al. (2016) talk about three types of stakeholder information (stakeholder specific, sector specific and destination specific), which are important to gestionate in an adequate way, to convert into useful for destination management, marketing and promotion (Presenza et al., 2005). Moreover it is important to use this information to identify the competitive advantages and the weaknesses of the destination and may suggest strategies to minimize the negative and maximize the positive effects. As for the external competitive environment, the DMO has two roles: collect information about providers of products and purchasers to identify opportunities, threats and new trends, and disseminate the tourist product of the destination to the tourists (Sheehan et al., 2016).

Figure 5. The Destination Management Organizations (DMO) as intelligent agent



Source: Sheehan et al. (2016)

There are three key abilities that are crucial for the proper functioning of an intelligent DMO. First, the DMO must be able to develop and facilitate collaboration between stakeholders. Secondly, the DMO must adopt a learning orientation which is based on learning from multiple sources and stakeholders, because nowadays there are a lot of social, economic and technological changes in a short period and competitive advantages are quickly lost. And the third key point is human resources, both the people

from the DMO and from other stakeholders, which are the key in all aspects of delivering a successful destination (Sheehan et al., 2016).

3.4. DMOs, tourism intelligence and tourism observatories

When collecting and analyzing data, the Tourist Observatories come into play, which are entities, often belonging to a DMO, whose functions are more specific than those of the DMOs, but observatories and DMOs do not have to coincide in scale. Tourism Observatories are in charge of analyzing and processing information for the stakeholders of the destinations as well as for the DMO and monitoring the planning of tourism in the destination as well as other destinations to measure competitiveness. Generally the power of decision making is in the hands of the DMO but the observatory is the one who contributes knowledge.

In 2004 the United Nations World Tourism Organization (UNWTO) created the International Network of Sustainable Tourism Observatories (INSTO) to support the continuous improvement of sustainable tourism industry through regular monitoring of the tourism performance for a better comprehension of the destination. The initiative provides decision makers, planners and tourism managers and other relevant stakeholders with key tools to strengthen institutional capacity to support the development and implementation of sustainable tourism policies, strategies, plans and management procedures. Evidence-based decision-making is critical to the development of sustainable tourism, and the INSTO initiative highlights the key role of the Observatory as an important means to continuously enhance the sustainability of the tourism industry. The Observatory has the potential to stimulate and promote the innovative development of destinations, and play a key role in monitoring and resolving issues such as job creation, sustainable consumption and production, public health and safety, human rights, education quality and inequality (UNWTO, 2016).

When a destination joins the INSTO network, it joins a group of partners who are committed to carry out measurement tasks at the destination level taking into account the nature of the destination and sustainability. It is about using new data sources together with the traditional ones to obtain information with stronger evidence to create stronger destinations. Although there are more than 40 issue areas, the following 9 are mandatory to be monitored (UNWTO, 2016):

1. Local satisfaction with tourism
2. Destination economic benefits
3. Employment
4. Tourism seasonality
5. Energy management
6. Water management
7. Waste water (sewage) management
8. Solid waste management
9. Governance

UNWTO (2014) identifies more than 500 indicators that may be relevant to monitoring for destination, however every destination has its own needs and is encouraged by the UNWTO to monitor additional specific issue areas. These indicators are continually

updated by initiatives such as the European Tourism Indicators System (ETIS), work carried by the European Environmental Agency (EEA), the Global Sustainable Tourism Council (GSTC), the International Network on Regional Economics Mobility and Tourism (INRouTe) and the Measuring Sustainable Tourism (MST). It is expected that the work of the indicators will continue to advance to provide reliable, consistent and relevant methods for the observatories (UNWTO, 2016).

4. Organization of tourism observatories and DMOs. Experiences in INSTO - UNWTO

Since the creation of the INSTO - UNWTO network there are already 30 observatories that are part of the network: nine in China, one in Greece, one in Mexico, one in Brazil, five in Indonesia, one in Croatia, one in the United States, one in New Zealand, one in Italy, one in Panama, one in Spain, one in Guatemala, one in Argentina, one in Australia, one in Canada, and the last two from Portugal, bringing a total of three observatories in Portugal. Each observatory is different, some are characterized by having only the presence of the tourism public administration and others by the participation of other departments and public administrations of different levels (statistical institutes, universities, private entities, business representatives, or chambers of commerce, among others). Some cases of observatories that have become members of the INSTO - UNWTO network will be described below. The criterion for which they have been selected has been the amount of information, since not all UNWTO observatories publish their documents publicly, so they are hardly accessible. The main references for the Canary Islands are the South Tyrol's Observatory and the West Australia's Observatory, since they are the only two of which it has been possible to carry out a tourism governance analysis.

4.1. South Tyrol Sustainable Tourism Observatory

The South Tyrol Sustainable Tourism Observatory is a member of the INSTO - UNWTO network since 2018 and it is the first one in Italy to monitor and evaluate the development of tourism in the province of Bolzano-Bozen in northern Italy. It is based on a partnership between the province, the tourism research and planning centre Eurac Research, and Innovation Development Marketing (IDM), South Tyrol's regional development agency and destination management organization respectively (see *Figure 6*) (Pechlaner et al., 2018).

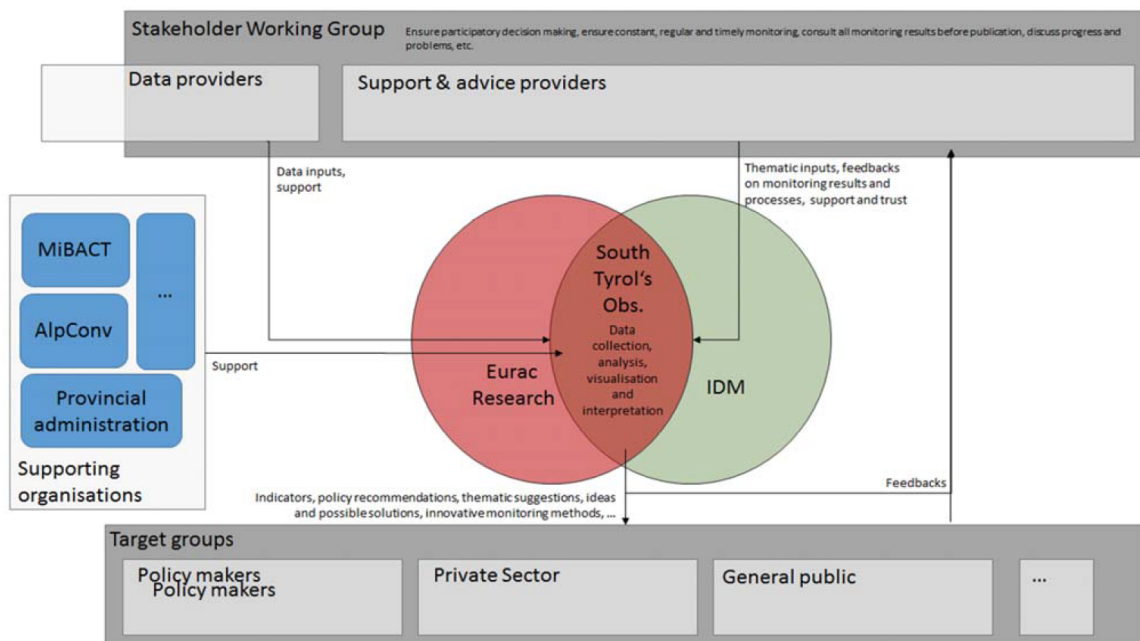
As mentioned above, IDM is the South Tyrol's DMO, which coordinates three destination Management Units at a subregional level and 78 tourism boards at a local level, so in terms of classification the DMO operates at regional level because the monitoring area is an autonomous province, but each Management Unit and each tourism board would be at local level. The former DMO responsible for the tourism industry was SMG (short for "Südtiroler Marketing Gesellschaft"), established in 1999, responsible for activities related more to the tourism marketing and responsible for the management of the South Tyrolean umbrella brand until 2005. The purpose of the regional umbrella brand is to unite under a roof the existing single brand products and services in the region to create synergies specially between tourism and local agriculture with the purpose of conveying the identity of the region. Currently it can be stated that the South Tyrol DMO carries out

both management and marketing activities, and even includes activities as business location development, agricultural marketing, and export (Pechlaner et al., 2018).

In *Figure 6* it can be seen that the cooperation between Eurac Research and IDM make up the core unit of the observatory, but many more agents such as a working group constituted by relevant stakeholders participate in it. The central unit is responsible for data collection, analysis, visualization and interpretation. All these processes are carried out under the support and supervision of the Stakeholder Working Group, responsible for ensuring participatory decision-making, continuous monitoring, accurate results and innovative future perspectives that monitor local issues. The Stakeholder Working Group is made up of a large number of institutions such as relevant provincial departments, agencies and offices, private sector associations such as the Bolzano Chamber of Commerce, the South Tyrolean Hotels and Restaurants Association, South Tyrolean Non-commercial Accommodation Providers Association, the South Tyrolean Farmers' Association, etc, research, academia and educational institutions as the Free University of Bolzano, and further relevant stakeholders like for example non-governmental representatives of the environmental sector, consumer organizations, labor unions and social co-operatives, etc. The list is very large but they can be classified into two main types of stakeholders (Pechlaner et al., 2018):

- The data provider which regularly share the data with the observatory, provide advice on its interpretation and use, and eventually collaborate to develop new surveys or collected variables
- Support and advice providers which will provide comments on related issues, feedback on monitoring results and processes, and ultimately help build overall support and trust in the Sustainable Tourism Observatory program to ensure its effectiveness and long-term vision.

Figure 6: Structure of the South Tyrol Sustainable Tourism Observatory



Source: (Pechlaner et al., 2018)

Apart from the 9 mandatory issue areas that sustainable tourism observatories are required by the INSTO - UNWTO to monitor, the South Tyrol Observatory included the following 10 destination specific areas also called “key sustainability issues”:

10. Innovation
11. Sustainable production and consumption
12. Ski tourism and other nature based outdoor sports
13. Biodiversity, nature protection
14. Cultural heritage and traditions
15. Mobility
16. Land use, spatial planning and tourism development control
17. Visitor management, control of use intensity and territorial distribution
18. Visitor satisfaction, wellbeing and behavior
19. Adaptation to Climate Change

These key sustainability issues were selected by a desktop research analyzing secondary data and documentary sources and the collection of main data through qualitative interviews from 18 Experts from the environmental, social, cultural and economic (tourism) sectors (composed of 15 local and 3 international experts), 4 visitors from three different countries (Italy, Germany, Switzerland) and 4 residents from South Tyrol (Pechlaner et al., 2018).

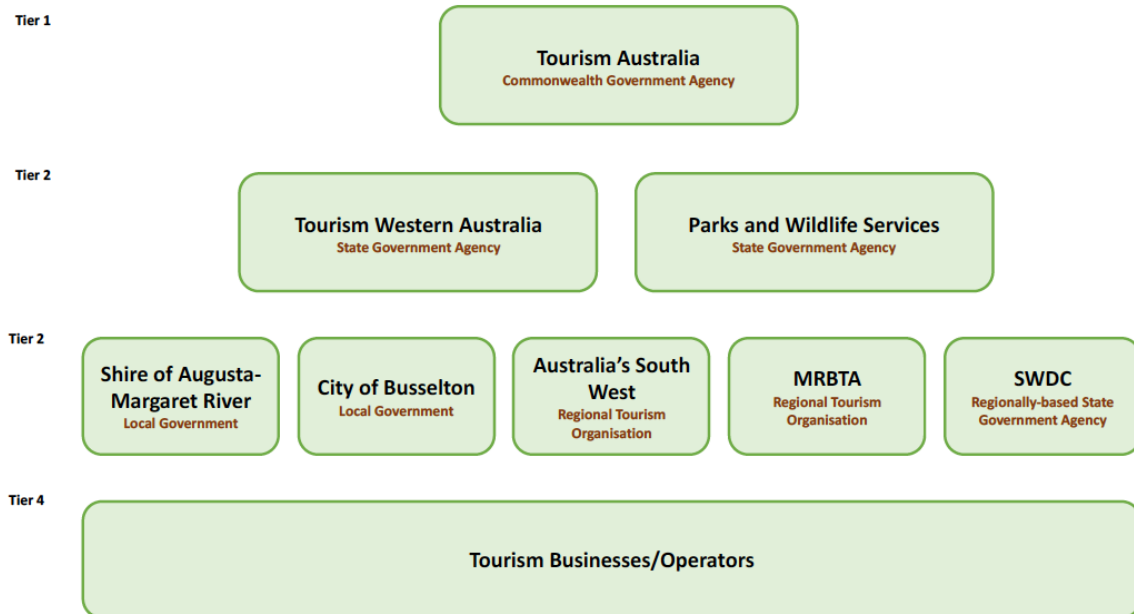
To sum up, the South Tyrol’s Sustainable Tourism Observatory is hosted by IDM, the DMO of the region which operates at regional level in coordination with the research center Eurac Research. These two entities work in conjunction with other relevant provincial departments, agencies and offices, private sector associations, etc. So the structure of the South Tyrol’s Sustainable Tourism Observatory is quite varied.

4.2. Australia’s South West Sustainable Tourism Observatory

The Australia South West Tourism Observatory (ASWTO) is the first INSTO - UNWTO Tourism Observatory in Australia. It joined the network in 2019 and its monitoring area is the Margaret River Region in Phase 1 but it will extend to all the Australian South West Region in Phase 2. It is hosted by the Curtin University Tourism Research Cluster (TRC), a world-class interdisciplinary research center that is part of the Curtin’s School of Marketing, Faculty of Business and Law. The TRC is a dynamic interdisciplinary research group composed of people from marketing, management, geography, public policy, space science, anthropology, and statistics. It’s members have carried out many applied research projects in Western Australia and other regions, including the latest projects related to product development and travel methods for Asian tourists in Western Australia and aboriginal tourism in Western Australia. TRC has also been monitoring the impact of Airbnb on the tourism industry in Western Australia, and regularly listens to social media to understand Perth’s (West Australian’s capital city) recognition and attractiveness as a learning destination (Volgger et al., 2019).

Regarding the tourism governance of Australia South West, there are several actors involved, multiple key stakeholders, including government agencies and non gubernamental organizations at different levels (*Figure 7*):

Figure 7: Governance Structure of tourism management in South West Australia



Source: (Volgger et al., 2019)

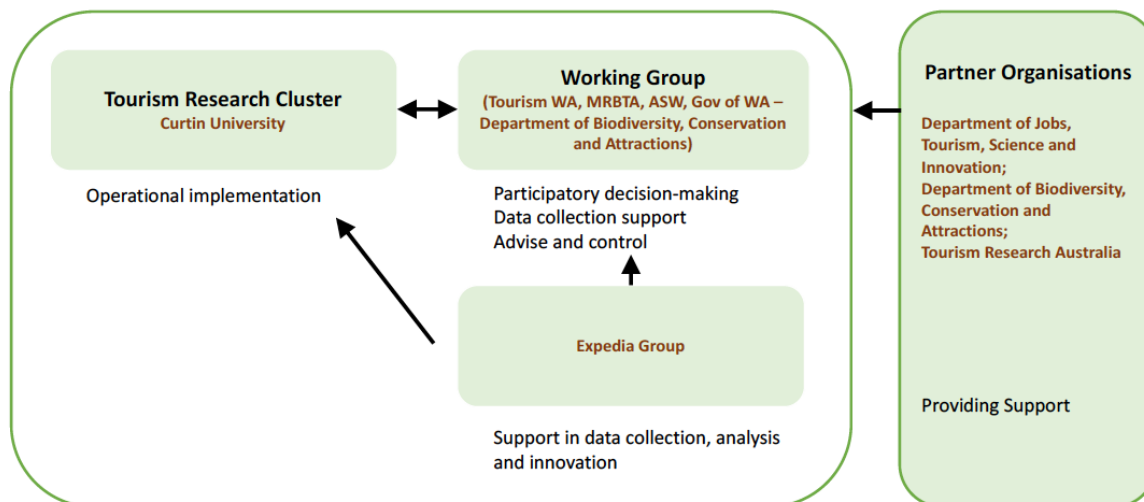
The functions of the actors who participate in tourism management are the following (Volgger et al., 2019):

- Tourism Australia is the federal Australian Government tourism agency which formulated the 2020 strategic tourism agenda and responsible for promoting Australian locations as business and leisure travel destinations.
- Tourism WA is the travel agency of the Western Australia Government, and its main function is to cooperate with other state government agencies and industries to expand Western Australia as a tourist destination under the "Experience Extraordinary" brand, sponsor large-scale events and investments and tourism infrastructures.
- Australia's Southwest (ASW) is a regional tourism organization, co-funded by Tourism WA and a member base of local tour operators. It works with Tourism WA to help them achieve their tourism goals at the regional level.
- The Margaret River - Busselton Tourism Association (MRBTA) is a private membership - based travel association and works closely with 780 local tour operators and operates six cave and tourist attractions and four visitor centers.
- The Southwest Development Commission (SWDC) is part of the Western Australian State Government. The purpose of the organization is to identify and support projects that benefit the region by cooperating with communities, governments, businesses and industry, thereby promoting the economic development of the region and helping the development of the Southwest.

ASW, MRBTA and SWDC usually adopt a collaborative approach to support the development and marketing of the tourism industry, but their competence areas do not completely overlap. Although ASW is mainly focused on marketing, SWDC is focused on development. MRBTA provides marketing, booking and tourist services exclusively for the Margaret River area (Volgger et al., 2019).

The Observatory is composed of two main institutions (see Figure 8). On one hand the TRC and on the other hand the Key Stakeholder Working Group constituted by: the MRBTA, Tourism WA, ASW and the department of biodiversity, conservation and attractions. Besides, as the Online Travel Agency Expedia has a wide coverage of accommodation in the area and has access to the latest accommodation data, the Observatory has established a partnership with Expedia Group to enable tourism stakeholders in the area to have wider access to this data. It's because of that the Expedia Group plays a special role as a research partner. In addition to the TRC and the Working Group, other partner organizations are essential to provide data that may help or expand the observatory's capabilities. For example, the Australian Tourism Research Bureau, as the main collector of data related to tourist flow and economic contribution, is essential for providing data to the observatory (Volgger et al., 2019).

Figure 8. Governance of the Australia South West Sustainable Tourism Observatory



Source: Volgger et al. (2019)

The initial work of ASWTO was guided by a framework of 20 specific regional indicators in 11 areas, covering 8 of the 9 topics recommended by UNWTO. This was used as a starting point to regularly monitor the impact of the tourism industry in the monitoring area, and will, for example, implement different surveys of residents, visitors, visitor movements, industries and travel agencies. The insights from these surveys will be supplemented by further data from other sources and will expand over time. The three additional regional-specific indicators are the following (Volgger et al., 2019):

1. Regional Production Cycles
2. Inclusion and Accessibility
3. Landscape Quality

To sum up, ASWTO, unlike the South Tyrol Sustainable Tourism Observatory, is not led by its DMO, but by the TRC which, although it maintains close ties with the industry and the government, does not carry out DMO functions, but it focuses on the contribution of knowledge that is the main function of tourist observatories. In addition, the stakeholder working group is made up of different governmental actors as well as private membership based organizations such as the MRBTA, but they all work in coordination pursuing the same goals settled by the federal tourism agency.

4.3. Sonoma County Sustainable Tourism Observatory

The Sonoma County Sustainable Tourism Observatory joined the INSTO - UNWTO network in 2017 to monitor Sonoma County, California in the United States, one of the largest counties in the San Francisco metropolitan area of California. The county is mainly agricultural, with 447 wineries, miles of rugged and scenic Pacific coastline, and towering redwood forests. Half of California's wine industry is located in the Sonoma/Napa Wine Country region, and Sonoma County is already one of the most visited attractions in California on vacation or weekends (COAST, 2017).

The Observatory is hosted by the Coalition to Observe and Advance Sustainable Tourism (COAST), a nonprofit cooperative organization established to observe, monitor, evaluate and report on the rapid growth of tourist service activities in the area, and to enable people in other places to learn and adapt to contribute to this growth sustainable solutions (COAST, 2017).

As to the tourism governance, the tourism industry is under the supervision of county and state government agencies, including the Sonoma County Economic Development Commission (EDC) and the Sonoma County Tourism Bureau. The Sonoma County Tourism Bureau is not operated by the government. Rather, it is a private, non-profit marketing and sales organization dedicated to promoting overnight stays and creating a sustainable hospitality economy in the county. The county's Planning Resources and Development Department (PRMD) and other independent organizations including the Sonoma Ecological Center and Sustainable Sonoma monitor sustainability issues (COAST, 2017).

The daily activities of the observatory are handled by a small group of staff led by the COAST executive director and the Environmental Research Center director. The policy is led by a five-member board of directors, which are different representatives of the tourism industry and with environmental/sustainability interests. As in the other INSTO - UNWTO Observatories, there is a working group formed by stakeholders who will advise and support the work of the staff and the Board. The Key Monitoring Areas of Sonoma County Sustainable Tourism Observatory are the following (COAST, 2017):

1. Impacts of agricultural-tourism growth in an environmentally sensitive rural area
2. Loss of funding for tourism and historical destinations
3. Water scarcity in a drought-prone area
4. Impacts of the sharing economy
5. Climate-change responsiveness and resilience
6. Employment and local living opportunities across cultures

In 2018, the Sonoma Observatory submitted its first annual report, held the first stakeholder meeting, and met with other observatories in Madrid. Special emphasis was made on the North Bay Fires which burned 245,000 acres, destroyed 8,900 structures and led to the tragically loss of 43 lives. In addition, half of the interviews to wineries were made to write a book on sustainable wineries (COAST, 2018).

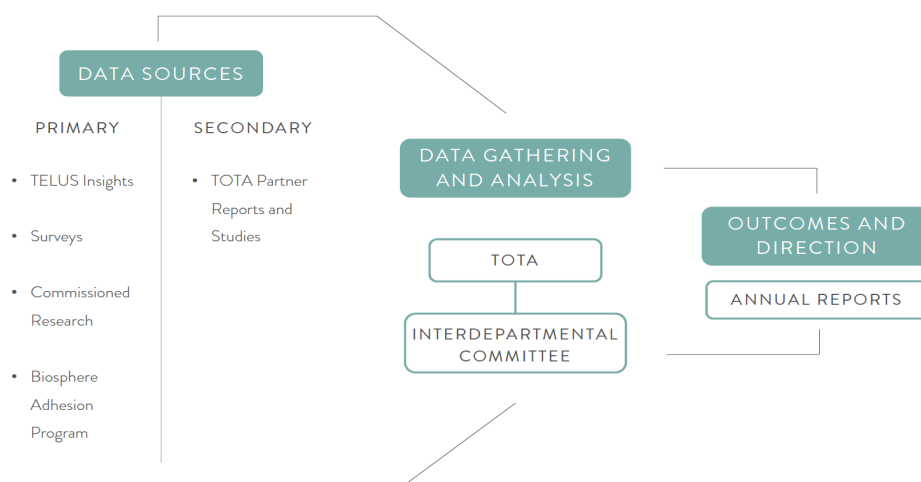
In conclusion, the Sonoma County Sustainable Tourism Observatory operates at regional level and is run by a nonprofit organization. The promotion and other DMO tasks are carried out by the Sonoma County Tourism Bureau which is also a nonprofit organization and even not governmental, but tourism management is under supervision of county and state government agencies who are the ones who finally have the decisive power.

4.4. Thompson Okanagan Sustainable Tourism Observatory

Thompson Okanagan is a region in the British Columbia (Canada) which joined the INSTO - UNWTO network in 2019, hosted by the Thompson Okanagan Tourism Association (TOTA). The TOTA is a nonprofit association governed by the "British Columbia Associations Act", managed by an elected board of directors representing the commercial and community tourism interests of the entire region. It is one of the five regional tourism organizations in British Columbia, working under the brand "Super Natural British Columbia", whose responsibilities include destination development and marketing (TOTA, 2019).

The structure of the Observatory is simple (*Figure 9*), the TOTA is the central repository and database of all the information collected from primary, secondary and tertiary sources to inform internal practices and provide guidance to partners and industry stakeholders. The primary data comes from Big Data partnerships, the Biosphere Certification Programs, Community level Stakeholder engagement, and subsidiary programs attached to each data source. The relevant data will be integrated in order to provide an annual best practice report related to the Observatory's work (TOTA, 2019).

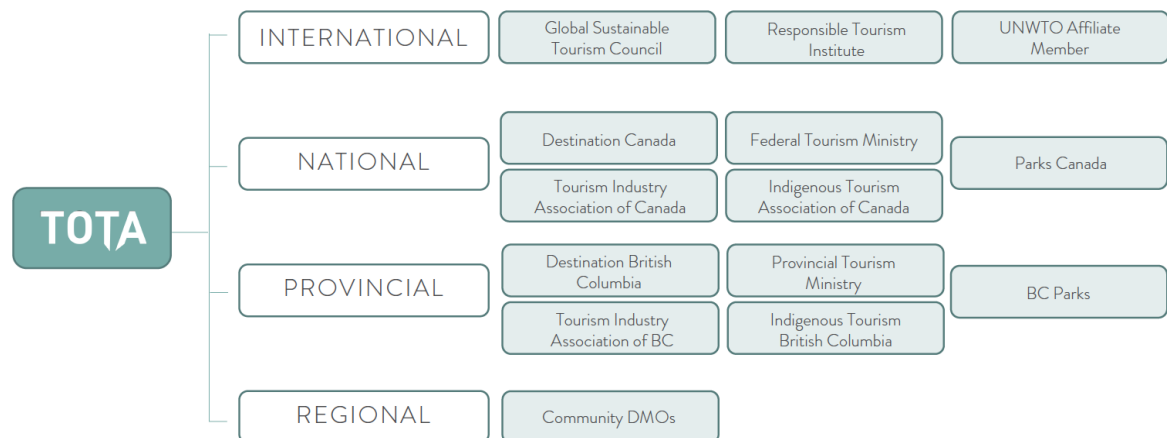
Figure 9. Structure of the Thompson Okanagan Sustainable Tourism Observatory



Source: TOTA (2019)

The Thompson Okanagan Observatory is the crystallization of research and data inferred from various partner organizations. The Thompson Okanagan Tourism Association (TOTA) is the main manager of the data and provides guidance and resources when applicable. In *Figure 10* the partnership model of the Observatory can be observed, a model in which different partners at regional, provincial, national and even international level participate.

Figure 10. Partners of the Thompson Okanagan Tourism Observatory



Source: TOTA (2019)

With respect to the Key Monitoring Areas, the Thompson Okanagan Sustainable Tourism Observatory decided to monitor the following 14 areas, being the majority overlapped with the ones the UNWTO suggest (TOTA, 2019):

1. Local satisfaction with tourism
2. Destination economic benefits
3. Employment, HR/labour
4. Seasonality
5. Energy management practices
6. Water management practices
7. Waste management practices
8. Carrying capacity
9. Climate change and increased weather-related events
10. Intra-regional connectivity
11. Indigenous products, experiences and community impacts
12. Land use (cross industry)
13. Sustainable tourism practices
14. Universal inclusivity

The Thompson Okanagan Sustainable Tourism Observatory is hosted by a DMO, the TOTA, which is a non-profitable organization which works together with many other non-profit organizations, non-governmental organizations, as well as tourism associations at different levels and even with private partnerships.

4.5. Croatian Sustainable Tourism Observatory

The Croatian Sustainable Tourism Observatory (CROSTO) was established in 2016, and it is hosted by The Institute for Tourism, Zagreb, to monitor the area of the Adriatic Croatia, the coastal part of Croatia, including seven counties. It was established to support Croatia's vision for the future of tourism. Through regular and timely monitoring of sustainable tourism in the Croatian Adriatic Sea, the observatory helps raise awareness of the possible positive and negative effects of tourism development in the region (Kožić et al., 2016).

Croatia has emphasized its commitment to sustainability in its tourism development strategy 2020. The initiative aims to promote innovation within the framework of sustainable tourism. The European Commission recognized the country's efforts in this regard through the ETIS award awarded to the city of Mali Lošinj. This recognition particularly praises the island's breadth and depth of insights into sustainable tourism practices (Kožić et al., 2016).

The CROSTO selected the following 6 Issue Areas to monitor in addition to the mandatory ones (Kožić et al., 2016):

1. Satisfaction of the host communities
2. Visitor satisfaction
3. Local economic benefits and employment
4. Tourism seasonality
5. Energy, water and waste control
6. Spatial development control

The Institute for Tourism is a public institute in Croatia specializing in research and consultancy services in tourism, but which depends on the cooperation of relevant stakeholders, especially the Ministry of Tourism and the Croatian National Tourism Board, which have mandatory powers over local tourist destinations.

5. Towards a tourism observatory in the Canary Islands

This section will be focused on the archipelago of the Canary Islands (Spain) and explain its tourism governance, its plan to enter the INSTO - UNWTO network and finally some difficulties and challenges for the Tourism Observatory of the Canary Islands will be exposed. This section is based on the Preliminary Study Report of the Tourism Observatory of the Canary Islands used as the application to join INSTO - UNWTO (Hernández Martín et al., 2020).

5.1. Current situation

The Canary Islands is an international tourism destination which has the highest inflow indicators when compared to other European regions. The destination is characterized by its low seasonality mainly due to its subtropical climate, which allows it to have moderate temperatures throughout the year and it is based on a tourist model which is highly dependent on large international operators. Destination management organizations in the Canary Islands are required to play a fundamental role in tourism coordination, because there are still many areas which need improvement.

Focusing on the tourism governance of the Islands, the responsible organization for lead and coordinate the tourism infrastructure, supervision and tourism promotion is the **Ministry of Tourism**, which is part of The Ministry of Industry, Trade and Tourism of the Canary Islands. Otherwise, responsibilities related to product creation are more concentrated at the island and municipal level. Apart from this, there are several entities that depend on the Ministry of Industry, Trade and Tourism and that are relevant for the tourism development, but those who are most in charge of monitoring are the Tourism Observatory and *Promotur*.

The Canary Islands already have a **Tourism Observatory** which was established in 2004 as an internal body of the Tourism department of the Canary Islands responsible for the research and monitoring of the tourism industry in the islands. However, in recent years it nearly disappeared because the monitoring issues were divided among several stakeholders, so it had no functionality. But fortunately the Ministry of Industry, Trade and Tourism recently announced that the Canary Islands will again have an Atlantic Tourism Observatory because of the needs of improving tourism intelligence and the lack of coordination between stakeholders. The redesigned Observatory will be a more dynamic model in which large volumes of information and big data will be analyzed, and traditional indicators will be combined with digital, social, environmental and profitability indicators. In short, the new observatory will focus on three basic pillars to work on: tourism intelligence, governance and sustainability (Hernández Martín et al., 2020).

It is worth mentioning that the **Vice Ministry of Tourism** also makes numerous contributions in terms of tourism monitoring. In recent years the Ministry on Tourism has prepared a report on holiday homes, very useful information for the design of the regulations for this activity; it is the organism in charge of preparing the annual report on the economic impact of tourism together with Exceltur for the preparation of Tourism Satellite Accounts; and, with the help of some companies and universities has formulated the Strategic Plan for Tourism of the Canary Islands. This plan aims to define the structural elements and processes of the tourism model of the Canary Islands, and meet a series of objectives with two time horizons: 2025 and 2040. The main objectives described in the plan are: to serve as an element of consensus, to make sustainability an traversal axis in tourism, leading social development through tourism activity and causing an acceleration and modification of the tourism ecosystem through technological advances.

The other important body in monitoring tourism on the islands is **Promotur**, a public owned company that is in charge of the regional tourism promotion and provides information for decision-making through their own research department which generates reports on multiple topics in tourism marketing and publishes them regularly. Some of the activities of *Promotur* are: provide detailed statistical analysis on tourists visiting the islands of the archipelago and tourists from major European countries, track the image of the Canary Islands in the tourists origin countries to know the way Europeans perceive the islands as destination, provide detailed statistical analysis on the profile of the tourists who visits the islands, or generate information about the air connectivity of the Canary Islands based on the air capacity.

Apart from these two entities that are the main ones in monitoring tourism in the Canary Islands, both depending on the Ministry of Industry, Trade and Tourism, there are other stakeholder whose relevance is also important for the tourism development:

- **Institute of Statistics of the Canary Islands (ISTAC).** The *ISTAC* is in charge of the compilation of all topics related to the region, especially statistics related to tourism, being the leading research institute in all of Europe on the quality of tourism statistics. The statistics it provides are very detailed, being some examples the accommodation survey, which provides accurate data on all the islands, the main cities and 47 local tourist destinations, or the survey of tourist spending, which provides information on tourist profiles, travel characteristics and tourist spending. Moreover, *ISTAC* also elaborates *Frontur*, which is the statistics of tourists arriving in the Canary Islands and includes detailed information on the islands as the main and secondary destination, as well as information on tourists from other points from Spain, being the Canary Islands the only region in Spain that has such information. To collect all these information, the *ISTAC* developed a Regional Tourism Information System (*R-TIS*) which consists of different statistical operations that combine different data collection methods as well as conventional methods (such as surveys, censuses, and administrative records) with new methods (such as sensors or other well-known sources included in big data). The objective of *R-TIS* is to support regional, island and city-scale tourism decision-making not only by providing regional tourism macroeconomic data, but also by answering different questions that arise in the management of tourist destinations in various dimensions, which is a necessary requirement to become a Smart Tourism Destination.
- **Canary Islands Tourism Council:** The main responsibility of tourism management is delegated to the island councils and municipalities, so each island has its own tourism board and even the most important tourist islands have their own research department to monitor the tourism industry and generate reports: *Turismo de Tenerife*, *Patronato de Turismo de Gran Canaria*, *Sociedad de Promoción Exterior de Lanzarote* and *Patronato de Turismo de Fuerteventura*. Each island has competency to write its own strategic plan, as well as each municipality. For example, *Turismo de Tenerife* launched its Tourism Strategy Plan in 2017 with a time horizon of 2020 and 2030.
- **Two Public Universities.** Both the University of La Laguna in Tenerife and the University of Las Palmas in Gran Canaria are relevant sources when it comes to gathering information to formulate tourism policies for the Canary Islands. In fact, the research results of these two universities have been widely recognized being the University of Las Palmas even recognized as the Spanish leader in tourism related academic research publications by the international ranking of universities - ARWU 2019 (Ranking of Shanghai).
- **Biosphere reserves and national parks management bodies.** The UNESCO (United Nations Educational, Scientific and Cultural Organization) declared all islands or at least part of their territory as biosphere reserves, with four national parks distributed on Tenerife, La Palma, La Gomera and Lanzarote. Therefore, each biosphere reserve has a monitoring and reporting plan that focuses on

environmental themes being their management agencies also relevant stakeholders in tourism monitoring.

- **National Institute of Statistics (INE)**. The National Institute of Statistics provides relevant information at national level, and unfortunately, it often lacks specific information for each island, so the Canary Islands Statistical Institute (*ISTAC*) developed its own statistical information. Even so, there is strong cooperation between the two institutes in some cases of information gathering such as the case of the Frontier Statistics (*Frontur*).

Those mentioned above in bold type are the main stakeholders, but there are still many other relevant stakeholders to mention. Some of them are: The Tourism Quality Bureau, The Tourism Professional Training Committee (a consulting and research organization for tourism education), *Hecansa* (a public company responsible for providing tourism education and in charge of hotel schools), Municipalities and the Federation of Municipalities, Spanish Airports and Air Navigation (*AENA*), Port Authorities of the Canary Islands, Hospitality Association of Tenerife, La Palma, La Gomera and El Hierro (*ASHOTEL*), Association of Hotel and Apartment Entrepreneurs of Lanzarote (*ASOLAN*), Federation of Hospitality and Tourism Entrepreneurs of Las Palmas (*FETH*), Association of Tourism Entrepreneurs of Fuerteventura (*ASOFUER*), Canary Islands Professional Association of Tourism Graduates (*COPTURISMO*), Think tank and Association of Spanish Tourism Companies (*EXCELTUR*), Canary Islands Tourism Innovation Factory (*FIT*), Chambers of Commerce of the Canary Islands, *Turisfera* (a cluster of firms for innovation in Tenerife), *Turismo Innova* (a cluster for firm innovation in Gran Canaria), firms related to the tourism knowledge system (consultancy, marketing, etc.) (Hernández Martín et al., 2020).

5.2. Plans for entering the INSTO - UNWTO network

The renovation and redesign of the existing tourism observatory in The Canary Islands will improve the quality of the decision-making process in the tourism industry of the Islands so that its aim is to enter the INSTO - UNWTO network to monitor the key sustainable issues and collect experiences and share information with other destinations. In march 2020 the “candidacy” was presented with a document prepared by a research team of both public universities of the Canary Islands: the University of La Laguna and the University of Las Palmas de Gran Canaria, at the request of the Vice Ministry of Tourism of the Canary Islands.

Following Hernández Martín et al. (2020), the Vice Ministry of Tourism will be the leading institution, with permanent support from the Institute of Statistics of the Canary Islands, *Promotur*, the two Universities and the support of the island public bodies on data and tourism intelligence. Each department must work together to develop a strategy for the archipelago. Its structure must not only provide the public and private sectors with relevant information in the decision-making process, but also must obtain the necessary data to develop relevant indicators and information. The Observatory is considered to be a facilitator and communication framework, not only to formulate, but also to monitor and evaluate regional tourism strategies, and then correct any deviations that may occur on the road to achieve the goals. The observatory also coordinates its activities with the

entire tourism knowledge system. Therefore, the structure has close connections with tourism stakeholders at the public, private and regional levels.

The selection of the Key Sustainability Issue areas is based on the ones the UNWTO suggests and the analysis of the Canary Islands' previous monitoring tourism reports and a stakeholder consultation during the development of the Strategic Plan of Tourism of the Canary Islands in 2019. The 9 areas suggested by the UNWTO will be monitored, plus 6 additional ones:

1. Local satisfaction with tourism and local well-being
2. Labor skills, entrepreneurship and employment
3. Destination innovation, economic impacts and benefits
4. Tourism seasonality
5. Tourism products, culture, leisure and tourist satisfaction
6. Digitalization, knowledge and smart tourism
7. Energy management
8. Water and wastewater management
9. Solid waste management
10. Climate change impacts and mitigation
11. Governance and the territorial scale of analysis and policies
12. Air transport connectivity and intermediation
13. Overtourism, vacation homes and mass tourism
14. Maturity of the destination and renovation
15. Natural capital supporting tourism. Protected areas and fragile ecosystems

To conclude, if the Canary Islands Tourism Observatory joins the INSTO UNWTO it will benefit from a series of advantages such as sharing experiences and being provided with tools to monitor the tourism sector in order to strengthen its management.

5.3. Difficulties of the Tourism Observatory of the Canary Islands

In this section, a general analysis will be carried out about the Canary Islands' Tourist Observatory using some tools of SWOT analysis.

Strengths

It is a strength that there is already an observatory that works well which lot of involucrated stakeholders that contribute in providing information about the sector. Especially the *ISTAC*, which as explained above is an outstanding Statistic Institute, being leader number one in the quality of tourism statistics from all Europe. To this is added the active participation and the competency of all stakeholders in general.

Weaknesses

The main weakness is that many of the activities are repeated because, as seen above, there are several entities that are in charge of doing the same tasks. On the one hand there is the Ministry of Tourism that is in charge of monitoring the entire Canary Islands, as well as *Promotur* and on the other hand there are the island councils and even municipalities which also have authority in tourism in its territory due to allocation of political power to different levels in the Canary Islands. In addition, both the Ministry and

Promotur, as well as the island boards and the R-TIS of *ISTAC* are in charge of collecting all kinds of information about data that in most cases are not agreed upon. Therefore, it is noticeable that governance in the tourism sector is not a strong point of the canary islands.

To this is added that despite that there is a lot of information, there are still some information gaps as for example: the environmental impacts of tourism, accurate statistical information on a local scale, the social impact of tourism especially related to education and employment, the new trends in the tourism industry, etc.

Opportunities

One of the main opportunities is that if the Canary Islands manage to enter the INSTO UNWTO network, it will be possible to take advantage of the exchange of information between the different member destinations and learn from their mistakes so as not to commit them.

Also an opportunity is the Strategic Plan of the Canary Islands towards Tourism released by the Ministry of Tourism in 2019, which will serve as a guide to address times of enormous acceleration in the changes of the tourism sector at a global level. It is an opportunity for the observatory to have this tool as it clearly sets out the objectives pursued by the Canary Islands as a tourist destination.

Another opportunity is that if the observatory works properly, it could provide information and knowledge of how to act respecting the Covid-19 crisis. May it be an opportunity to overcome the crisis or at least mitigate its effects and that the tourism sector comes out of it as well as possible.

Threats

The lack of coordination and cooperation between the tourism bodies at the regional, island and municipal scale is a great threat and could obstruct the functioning of the observatory. To this must be added that since governance is a bit diffuse and there are several organizations whose tasks are overlapping, the main threat is that the Tourism Observatory could create even more confusion instead of strengthening the Canary Islands' governance. To conclude, the latest threat is the Covid-19 pandemic, that has brought a lot of uncertainty especially to the tourist sector which is basically frozen. The crisis obviously is a threat that could hinder the operation of the observatory, since the magnitude of the consequences of the crisis is not well known yet.

As can be seen, the observatory has its strong points and weak points. As the Minister of Tourism has already stated when presenting the Tourism Plan in 2019, a fundamental axis on which it will be necessary to work is governance, therefore, work is being done to improve in this area which is completely essential for the proper functioning of the observatory.

6. Tourism Observatories and Covid-19

The global outbreak of Covid-19 has brought the world to a standstill, and worldwide it is being a real challenge for the tourism industry to face the crisis, but as almost everyone

has become aware of the negative aspects that the coronavirus crisis has brought, this section will be dedicated to see the other side of the coin and will expose some opportunities that have or may arise in the future as a result of the crisis.

Hernández Martín & Padrón Fumero (2020) see governance as an important lesson learned during the pandemic describing the coordination between the actions of the World Health Organization (WHO) and the governments, as well as the fast reorganization of the hospitals, supermarkets, or even the educational ambit. The effective reorganization of work in the companies and the institutional decision-making models are a rising value.

All the lessons that have been learned during the crisis can emerge opportunities to anticipate future crises, new priorities and needs, with health being the primary good. Therefore, the need for short-term coordination to find safe destinations can help accelerate the changes necessary for the sustainability of the tourism industry (Hernández Martín & Padrón Fumero, 2020). Hernández Martín & Padrón Fumero (2020) propose “a beacon, a lever and specific policies” for the sustainability of the sector. First, the beacon of sustainability is the implementation of a new regulatory model so that all companies in the industry can appropriately internalize the social costs and impacts of the resources they consume. Second, the lever must be technology to improve resource management to, on the one hand, achieve an improvement in services and on the other, help private agents to optimize their decision-making in regarding scarce resources and external costs. A smart destination is based on accumulating information and providing it at the right time and place, but it should not be forgotten that in addition to information, cooperation with companies and public institutions is very important to obtain better results when planning objectives. In other words, even though the information available is very rich and of quality, it will be useless if there is no good strategic planning in the destination.

Technology will become one of the key elements that will help overcome this unprecedented crisis. Therefore, the Canary Islands and the global tourism industry must take advantage of this situation to accelerate the process of innovation and digital transformation that has already begun in the industry. This digital transformation must be comprehensive, from the destination to the companies and workers that comprise it. The events of recent months have highlighted the basic role of technology in daily life, so promoting the digital transformation of the tourism industry will increase its resilience. On the other hand, the training aspect also plays a very important role since good training can make the sector better prepared for times of uncertainty and insecurity. Emphasis is placed on digital learning and online training to discover opportunities that allow the tourism industry of the Canary Islands to develop and face the new challenges of Covid-19 (Rodríguez Miyares, 2020).

Taking into account the use of technology to overcome the Covid-19 crisis, DMOs and tourist observatories play a very important role, as they are the main ones in charge of anticipating this type of crisis situation. To this must be added that the proper functioning of the Canary Tourism Observatory is crucial to be able to face a crisis of such caliber, so once again it is proven that governance plays a fundamental role in the management of a tourist destination.

7. Conclusions and implications

Destinations are very complex tourist systems in which many agents are involved with different interests or objectives, so their management is essential. To manage a destination, DMOs are a fundamental requirement, as they are the agencies that are in charge of this task. DMOs have different functions as well as there are different types, some being characterized only by the presence of the state while in others other departments or even public administrations of different administrative levels participate. Whatever the nature of the DMO and its composition is, they will always have the objective to act as a catalyst and facilitator of the realization of tourism, taking into account the peculiarities of the destination, since every destination is different. In addition, sustainability should be a transversal axis, in any field, and especially in tourism since it is an industry that can generate a lot of impacts. On the other hand, the Tourist Observatories are entities whose functions are more specific, since they analyze and process information for the DMO. They are in charge of monitoring tourism in the destination and following up on planning. While the observatory is in charge of providing knowledge, it is the DMO that has the decisive power and the capacity of action to improve sustainability and competitiveness.

After looking at some cases of Tourist Observatories of the INSTO - UNWTO network, it has been concluded that each Tourist Observatory is different, since each destination has its own needs and singularities. There are Observatories which are run by the DMO (South Tyrol Sustainable Tourism Observatory), others by non-governmental organizations (Australia's South West Tourism Observatory), others by governmental organizations (Sustainable Tourism Observatory of the Canary Islands), etc.

It has been concluded that in the Canary Islands exist excellent tools such as *ISTAC*, *Promotur* or the public universities to carry out tourism monitoring even more so with the incorporation into the INSTO - UNWTO network, but as seen tourism governance needs to be improved because there are still many overlaps, gaps and contradictions in destination management, and there is no clear definition or skills to solve these problems, since it is a complicated issue. The Canary Islands need greater coordination between institutions and departments and between public and private interests. Stakeholders must work in a coordinated way and each organization should be clear about its functionality. For the Canary Islands the three Key Performance Areas proposed by the UNWTO (2019) should be taken into account, which are: strategic leadership by applying a collective vision to all stakeholders, executive execution by clarifying the role of the DMO and effective governance providing the industry with awareness and guidance on quality and excellence, promoting sustainable and responsible tourism, and efficient and transparent corporate governance. In addition, the Canary Islands Tourism Observatory can be guided by the Strategic Plan of the Canary Islands towards Tourism presented in 2019, which has already exhaustively identified which aspects need to be improved, including governance as the main axis.

Finally, the arrival of the Covid-19 crisis is a serious problem for the tourism industry, whose activity is practically paralyzed, but it can also be seen as a learning opportunity. When UNWTO (2019) refers to the fundamental functions of DMOs it mentions the crisis management, that although it is a difficult task, it must be addressed by the DMO. DMOs as well as Tourism Observatories play a very important role in terms of improving the

knowledge and information for a better management of the crisis and, with the support of technology and labour skills, can make the effects more bearable. Covid-19 can also be seen both as a lesson learned to anticipate upcoming challenges as well as an opportunity to speed up the process of converting the destination into smart, a process that has already begun in several destinations. Within this process, a tourism observatory can be a powerful tool. In the case of the Canary Islands, this observatory should be an international reference for other tourism regions.

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Annex

Table 1: Governance definitions as a normative concept

World Bank (WB)	Governance consists of the traditions and institutions through which authority is exercised in a country. This includes the process by which governments are elected, overseen and replaced; the government's capacity to effectively formulate and carry out good public policies and the extent to which citizens respect the State and the institutions that govern economic and social interactions." (World Bank, 2009).
United Nations Development Program (UNDP)	Governance consists of the various mechanisms, processes, relationships and institutions through which citizens and groups articulate their interests, exercise their legal rights, recognize their obligations and reconcile their differences. A system of governance is the formal and organizational institutional structure for the process by which the modern State takes and is bound by decisions (UNDP, 1997).
Organisation for Economic Co-operation and Development (OECD)	Governance is how a society uses and oversees political authority in managing its resources for economic and social development; how it considers the role of public authorities in establishing the environment in which economic agents operate and in determining how benefits are distributed; and the nature of the relationship between the government and the governed (OECD, 1995).
Commission of the European Communities (CEC)	Governance determines the norms, processes and behaviour that enter into the exercise of powers at European level, especially from the standpoint of openness, participation, accountability, effectiveness and coherence (CEC, 2001)
United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP)	Governance is the process by which decisions are taken and the process for implementing or not implementing those decisions. The analysis of governance centres on the formal and informal actors involved in the processes for taking and implementing decisions, and on the formal and informal structures that have been put in place for the implementation of decisions (UNESCAP, 2006)

Source: Duran (2013)

Table 2: DMO Functions

Functions	Authors
Destination marketing, branding and positioning	Baggio (2008), Bieger et al. (2009), Bornhorst, Ritchie, Bornhorst, and Sheehan (2010), Bramwell and Rawding (1994), Crouch and Ritchie (1999), Elbe et al. (2009), Gretzel et al. (2006), Heath and Wall (1992), Osmankovic, Kenjic, and Zmic (2010), Pechlaner, Volgger, and Herntrei (2012), Prezenza et al. (2005), Prideaux and Cooper (2002), ROS Development and Planning (2008), Sheehan, Ritchie, and Hudon (2007) and Socher (2000)
Relationship building/coordination/facilitation	Bornhorst et al. (2010), Crouch and Ritchie (1999), Elbe et al. (2009), Heath and Wall (1992), Prezenza et al. (2005), Prideaux and Cooper (2002), Sheehan et al. (2007) and WTO (2007)
Product development/development activities	Baggio (2008), Bieger et al. (2009), Bornhorst et al. (2010), Osmankovic et al. (2010), Pechlaner et al. (2012), Socher (2000) and WTO (2007)
Destination planning, strategy formulation monitoring and evaluation	Baggio (2008), Bornhorst et al. (2010), Heath and Wall (1992), Pechlaner et al. (2012), Jenkins et al. (2011) and WTO (2007)
Resource stewardship, environmental management	Bornhorst et al. (2010), Prezenza et al. (2005) and ROS Development and Planning (2008)
Human resource development, training	Prezenza et al. (2005), ROS Development and Planning (2008) and WTO (2007)
Destination management	Bornhorst et al. (2010), Crouch and Ritchie (1999) and Gretzel et al. (2006)
Quality assurance	Osmankovic et al. (2010) and ROS Development and Planning (2008)
Information provision and reservations	Bieger et al. (2009), ROS Development and Planning (2008) and WTO (2007)
Research, information management and knowledge-building	Osmankovic et al. (2010) and Prezenza et al. (2005)
Visitor management, managing the visitor experience	Bornhorst et al. (2010) and Prezenza et al. (2005)
Service provision, coordination	Bornhorst et al. (2010) and ROS Development and Planning (2008);
Business support	Prideaux and Cooper (2002) and ROS Development and Planning (2008)
Policy making or enforcement	Baggio (2008) and Bornhorst et al. (2010)
Destination and site operations	WTO (2007)
Crisis management	Prezenza et al. (2005)
Assistance with accessing finance	Prezenza et al. (2005)
Enhance well-being of destination residents	Bornhorst et al. (2010)
Animation	ROS Development and Planning (2008)

Source: Pearce (2015)