DMO Review Responses: Full Report
Llewellyn McLaren Consulting / 24 JUNE 2021

Purpose
This report presents the major findings arising from analysis of the DMO Review survey responses and other submissions received from the consultation phase. The report builds upon the headline findings report (27 May), which picked up on key themes emerging from the initial reading of the responses. This report provides more detail and analysis: we summarise the key themes under each subheading and contextualise the findings based on balance of responses; differences in views among respondents, including regional / organisational type differences and sub-sectors. Each section includes some illustrative quotations from those respondents who agreed to be quoted in the DMO Review final report.

The summary of the dataset is provided in Annex 1. Illustrative case studies of the best practice highlighted by respondents are provided in Annex 2.

Themes

DMO strengths in visibility, promotion, and local knowledge driven by passionate staff

Overall, DMOs are seen to be strongest on issues of marketing, publicity, and visibility for destinations with strategic elements of 'management' less prominent in most responses. A high proportion of respondents **(>60%)** highlight that intelligence gathering, regional/local knowledge, information and dissemination of data, stats, policy, and process can be strong with an effective DMO, and that training, support, and engagement with businesses (where provided) works effectively to support businesses and the local economy in particular. DMOs serve as good collaborators, coordinators and facilitators, especially when grounded in local knowledge and understanding. DMO staff – their passion, commitment, knowledge and expertise – are regularly referenced **(>40%)** as a positive, and the individual staff commitment is often seen as driving the best kinds of collaborative relationships with other players in the sector. The Covid-19 context seems to have deepened appreciation for the role of DMOs as intermediaries between stakeholders, including between central government policy and emergency funding and local businesses in need of support. Good performing DMOs are often seen in terms of 'trusted' status by a range of stakeholders such as businesses in the area, local authorities and members of the public; for businesses in particular, the best performing DMOs are seen to provide reliable and dependable information on the latest guidance, trends, and policies in the industry as well as training and development support.

> *"great connectors" – DMO Organisation, South West*
>
> *"passionate, grass-roots experience and knowledge of the city, whilst at the same time thinking laterally and blue sky" – cultural organisation, South West*
>
> *"kin to a public sector organisation but are not run by the public sector so are more responsive to the industry" – member of the public*
>
> *"the closer to product the DMO is the greater the benefit to members" – self-catering holiday provider, South West*

"DMOs play a critical role in addressing market failures" – DMO Organisation, South West

"A good DMO is greater than the sum of its parts. It speaks for the local industry, raises standards, supports training and skills, coordinates promotions and links in to national structures for research and data gathering. None of these can be done by an individual commercial enterprise." – member of the public

"DMOs are uniquely placed to co-ordinate businesses across both geographic and thematic areas." – DMO, tourist alliance, South West

"Destination management covers six main areas of work related to the visitor economy, all are inter-linked, and a destination is most successful when it has all six areas working well and in balance. They include, but are not limited to, strategy and policy, business support, product development, visitor experience, marketing, skills, and workforce development." – DMO, North East

"[DMO staff] are able to bring grass-roots experience to blue sky strategic thinking." – cultural development partnership, South West

DMO weaknesses in variability of value, approach and strategy

The general view **(~52%)** is that variability in approach is the main weakness of the DMOs collectively: respondents indicate quite divergent views on the reasons for this weakness, from lack of trained or sufficient staff levels, too much focus on marketing rather than management (see al*so DMO definition* below), lack of consistent funding models and absence of visible KPIs or performance measurement to identify areas for improvement and targeted support.

The weakness reported around *funding* relates to the subscription/membership fee model. While there is recognition that this is necessary in the absence of core funding from local or central government it is often felt to introduce and/or exacerbate imbalances and tensions, particularly for small businesses who hold that those paying larger fees or bigger enterprises then get more return on investment and profile/attention. Some – although a relatively small number of respondents **(<5%) -** query whether the current model moves DMOs to chasing self-sponsorship in order to demonstrate value and create work: these responses are mainly located in feedback from small businesses, accommodation providers and tourist attractions. There are a number of responses **(>30%)** that question whether there are too many DMOs and whether this inhibits effective and efficient coordination around and collaboration on national strategy. These responses are spread across respondent type, and include those self-identifying as DMOs:

"*Too many seem to think Instagram likes are their main goal in life." – B&B owner, South West*

"Often they work to keep themselves 'in business'" – Tourist attraction owner, North East

"The present structure of membership funding means that DMO's outside of traditional honeypot destinations are poorly resourced and are not as effective as they could or should be." – Local Enterprise Partnership, South East

The phrase "honeypot" to refer to those destinations seen to receive most attention from DMO activities is used by **c.6%** of respondents.

DMO definition lacks clarity and this impacts on delivery of strategy

In the majority of responses from all groups there is a repeated reference to the lack of an agreed definition of a DMO, including as part of the current review. This is viewed as more than a question of terminology. The majority of such responses – including those from DMOs themselves - highlight that this absence of clarity on what a DMO is results in potentially too many DMOs and too diverse a range of organisation types at the same time as it impedes on questions of strategy and delivery. One of the main reference points for this is a concern about whether the 'M' represents 'marketing' or 'management' or an uncomfortable/inconsistent accommodation of both depending on personnel, region, and/or interaction with different stakeholders. This means that while many responses praise the work of high performing/effective DMOs at the level of the marketing and publicity they generate, there is a fair level of doubt about how they act in terms of 'management' of aspects in the sector. Many respondents **(>35%)** indicate that the perceived absence of a national strategy or coordination function for the DMOs means that those that do deliver achieve benefits for members/areas in a self-motivated and self-directed way, which while it does demonstrate benefits to the local / regional does not allow DMOs to play to their potential strengths as local deliverers of national strategy. Interestingly, local authority respondents in particular request an improved definition for DMOs.

"The biggest problem is the definition of a DMO. Do you mean a Destination Management Organisation or Destination Marketing Organisation?" – local authority, South East

"I constantly have to explain what a DMO is" – DMO, Midlands

"Ensure the 'M' in DMO stands for management and not just Marketing. DMOs need to focus on the product and visitor experience as well as on the marketing and messaging." – local authority DMO, South West

"Promotion should be no more than 50% of the job of a DMO, whereas currently it is nearer 100%." – tourism consultancy organisation, South East

"Focus as much on 'management' as 'marketing'" – conservation organisation, South West

"The Review Terms of reference does not provide a definition of a DMO. In consultation with tourism organisations across England this is one area where there is a strong request for clarification of the role of a DMO as a management organisation and definitely not just a marketing one" – local authority DMO, South West

The value DMOs add is not sufficiently quantified or measured

Concepts of value range from the indicative calculations of ROI to specific businesses in a small number of total responses through to broader and less quantifiable benefits around visibility, marketing, and general collaborative ways of working: for example, one small business owner indicated they researched specific DMOs and their demonstrations of added value before deciding in which area to set up a B&B. Current added value is largely located in economies of scale, collective and collaborative representation for a large number of businesses and stakeholders, and strong marketing of the regional offer: as noted under DMO strengths above, local knowledge and commitment is seen as driving good delivery and associated benefits. DMOs are also seen to add value in terms of networking and training needs, especially when working in partnership with other organisations or networks i.e. overlap with Local Enterprise Partnerships and/or BIDs or local economic plans. Several respondents **(c.6%)** highlighted that the question of value also relates to purpose – are the DMOs there to deliver value to the businesses that pay subscription fees to them or to the tourism sector more broadly and where does value for the user/visitor/customer sit in relation to these elements? Many responses **(>35%)** highlight that DMO strategy and role need to be clarified to be able to understand value; this response comes from all respondent groups. Where DMOs currently add value – and could deliver more – is viewed by respondents in terms of leading, facilitating, brokering, and delivering with partners on a holistic vision and strategy. Here responses suggest that a clearer benchmarking or expectation around improved regional economic benefits derived from DMOs should be a priority.

> *"where is DMO value in the journey?" – DMO, South West*
>
> *"There are, however, far too many DMO's all falling over each other and territorial about roles. This makes funding tight and in turn restricts effectiveness." – DMO, South East*
>
> *"The role of an effective DMO goes much further than existing business support mechanisms. Coaching, training, 'hand holding' is resource intensive and requires a sustained intervention over a long period for a proper understanding of the business and trust to build up. Most importantly, following diagnosis, a DMO can then also develop solutions, bringing together effective partnerships and creating campaign activity that will address the needs of both the businesses and the destination. A DMO is able to work with a business across its full 'life cycle' and not just dip in and out for specific interventions. DMOs are responsive, dynamic and able to adapt quickly." – DMO, Midlands*
>
> *"A DMO is a key cog" – local authority, North West*
>
> *"our booking software allows us to track where our customers found us and the DMOs we work with regularly appear in the list" – self-catering accommodation provider, East of England*
>
> *"A single article in a national newspaper mentioning one of our small local businesses, saw a ten fold increased in bookings." – DMO, South East*

“I don’t believe enough DMO’s are able to demonstrate value-added to their members or to their visitors/customers.” – DMO, South West

The regional variability is highlighted under the issue of added value in particular: “postcode lottery” is a phrase used directly by **c.2.5%** of respondents – including individual members of the public, local authorities, and heritage sector organisations – to indicate a sentiment expressed elsewhere throughout **c.15%** responses to different questions about DMO effectiveness.

DMO structures are variable
Variability of structures, resourcing, staffing (including references to volunteerism and part-time/fractional workers) are raised as issues related to individual DMOs; this includes post-Covid-19 vulnerabilities associated with loss of staff, overwork and challenges in future recruitment. In terms of overall structures, there is a clear strand of responses **(>37%)** that advocate for a stronger alignment of DMOs, including the need to reduce competition between DMOs in regional contexts, reducing the total number of DMOs (see also below under *DMO focus points*), creating a forum for DMOs to collaborate and share best practice and to have a clearer hierarchy from government to VB/VE through to regional DMOs. More than half of these responses suggest that greater integration related to structures between national and regional levels would result in clearer direction, benefits and value offers (for example, DMOs as tourism equivalents of National Portfolio Organisations in the Arts Council context with appropriate requirements attached to core funding). A further number of responses in this area indicate support for greater sharing and consolidation of ‘back office’ functions, and increased investment in digital technologies as a way of collaborating and working more effectively – see Annex 2 for best practice example from Visit East of England.

While funding plays a role in some of the responses about structures, it is an unhelpful/unequal mix of organisational and business models that come across most clearly, with reference made to DMOs as charities, businesses, CICs. The percentage of resource derived from Local Authorities and sector businesses is often perceived as determining the nature of the delivery within the structure as much as any fundamental shared principles for organisational structure in the sector more broadly. There is support from several submissions **(>c.17%)** of a core funding model supplemented by additional industrial subscription / membership fees. However, this would need to be placed in the context of the anxieties about inclusive support and access to opportunities that are also raised.

“each one has to find its own role, relevance, and financial model/funding, usually without support from local authorities as tourism is not a statutory obligation” – DMO, East of England

“A heartfelt plea to take an honest and independent review and kick start much needed and long overdue change, to create a cohesive DMO community across the UK. Properly funded, independent of the public sector/not reliant on it for core funding and to take a brave step towards empowering and enhancing the reputation of the industry, so it is seen alongside other sectors, as a career path of choice!” – Experience provider organisation, South West

A significant number of the comments about the proliferation of DMOs and the need to improve coordination of localised delivery of central/national policy/strategy point to the upcoming review of the Local Enterprise Partnerships, and view LEP-style models as potentially allowing for a consolidation of the number of DMOs and greater strategic management of their activities and performance. These responses are raised from across respondent types.

DMO focus points should be measured in terms of performance, transparency and value
There is a significant strand in **c.35%** of responses that focuses on the absence of a clear, published, and visible strategy with delivery plans, KPIs and associated transparency and accountability for DMOs collectively and individually. This is related by respondents to both structure and funding model issues. But it is also more fundamentally explained by respondents in terms of the need for comparable understandings of what success looks like, coordination and direction-setting values associated with plans rather than just activities carried out by DMOs, and how the DMOs can serve as much stronger assets for the relationship between specific places/locations and broader (inter)national factors. Suggestions from some existing DMOs or those working closely with them include clear service level agreements at different DMOs based on national, regional, local degrees of delivery and performance – see below and best practice example of a newly formed local authority funded DMO in Chichester in Annex 2.

DMO areas/regions can seem indebted to older regional structures
A solid number of responses indicate that current regional DMO arrangements often feel indebted to old county or local government structures that make less sense in contemporary ways of working. There is also tension over the regional mapping of DMOs against other infrastructure such as the LEPs. It is felt that this inhibits greater strategic alignment, harmonisation, and collaboration. A number of these responses also highlight that such regional mappings across county, local authority or other borders have no relation to the actual visitor/tourist experience. However, there are a group of responses which indicate where these align well the relationship between other regional structures works well – for example, in Cumbria and in the coordination of responses from the Newcastle Gateshead Initiative.

The regional aspect is also highlighted in terms of appropriate clustering of knowledge, skills, expertise and access to support: central government departments like BEIS are referenced in terms of an overarching government strategy delivered through regional vehicles such as LEPs and Growth Hubs (manageable in number, proactively in dialogue across the infrastructure and with central / national policy), or other DCMS NDPBs/ALBs such as Arts Council England. DCMS is not currently perceived as providing the same model for DMOs.

> *“are fragmented, disjointed, under-resourced and still rely on local authority boundaries that tend to have nothing to do with how tourists - domestic OR international - perceive destinations” – academic researcher, North East*

"DMO's are in need of a complete restructure. The only people operating by geographic areas are DMO's and this is not how people buy and has not been for sometime." – travel agency, South West

"A model based around a much larger geography is worth considering as is anchoring the DMO function in the LEP Growth Hub structure, which are currently demonstrating extremely high performance levels." – Local Enterprise Partnership, South West

"There is an urgent need for a functioning national portfolio network of 15-20 Destination Organisations that are appropriately strengthened, structured and resourced to deliver a key role in recovering from the Covid crisis and beyond. These 15-20 Destination Organisations should cover areas that make sense to the consumer and that businesses and places within that area have a real affiliation for."- academic researcher, North East

"With the review of the LEPs taking place in the summer, there could be alignment opportunities to adopt the same geographical areas and develop effective partnership boundaries and strengthen business links." – Local Enterprise Partnership, South West

"[DMOs as] national portfolio organisations could carry out the following tasks that are relevant to our agenda:-

- *Act as bridge from national government and Visit Britain and the wider tourism infrastructure;*
- *Work with Visit Britain and the Airport to co-ordinate joint overseas marketing campaigns;*
- *Collate and monitor data to ensure evidence-based policy making;*
- *Collate and disseminate research to businesses to enable better decision making and greater productivity;*
- *Account manage key tourism businesses and attract further inward and capital tourism investment." – transport provider, North East*

DMOs: equality, diversity and inclusion

While not widespread across responses there is a concern among a fair number of respondents **(c.10%)** about the diversity and inclusiveness of DMOs, in terms of staffing and more particularly in terms of Boards and other governance structures. Reference is made to these potentially leading to conventional viewpoints and a lack of diverse perspectives which feels unrepresentative of the sector. Those DMOs with a strong sense of the diversity of the sector in their region and inclusion of this in governance arrangements come in for some praise – see Annex 2 for Ipswich DMO best practice example. The close alignment in terms of overlapping membership between different organisations – LEPs and DMOs – is mentioned positively, but the broader concerns about diversity and inclusion relate to questions of gender and ethnicity in particular.

"[DMOs need to] represent all parts and levels of the visitor economy" – DMO, South West

> *"To be representative and respected by the sector" – regional DMO grouping, South West*
>
> *"It's a postcode lottery as to whether your local DMO is any good though and whether they are inclusive." – local authority, Midlands*
>
> *"Board doesn't always reflect society" – tourist transport provider, East of England*
>
> *"Ensure good range of Board members, not just the usual suspects" - experience provider, Midlands*
>
> *"I think they need to include the public more" – academic researcher, North East*

DMO funding models are unclear but there is an openness to core funding having performance requirements
There seems little visibility of the funding mechanisms and models for most respondents, partly as a result of such significant variations across different DMOs: many **(>30%)** answered that they felt unable to answer/comment on this point or submitted no response, while others seemed keen to assert that they didn't understand the model or where funding was sourced. There is a dominant sense that more sustainable and core funding is required, potentially (for a fair number of respondents) as a 'baseline' to which membership and subscription costs could then be used as supplementary. Concerns over a reasonably level playing field across DMOs was a strong line in responses.

There is recognition by many respondents **(>30%)** that more sustainable funding models have to come with performance management expectations, and degrees of audit and assurance. These are largely presented as good things in the context of a more holistic national strategy, and several responses suggest that national accreditation or 'kitemarking' should be used for DMOs to ensure quality but also strategic, accountable and focused delivery in regional contexts of national agendas. DMO Management Plans which engage with localised needs but in a holistic strategic context were mentioned by a number of respondents **(c.12%)**.

> *"[DMOs should] Have a properly funded sustainable structure, with a clear strategy set out over 3-5 year period with specified outcomes and outputs." – DMO, Midlands*
>
> *"DMOs are able to trade. They can address 'market failure' situations where other private sector operators have failed to intervene. They are not driven by profit or shareholder returns or political agendas and can therefore work genuinely in the best interests of their partner businesses." – DMO, Midlands*
>
> *"The current DMO model is complex purely because of how DMO's have emerged in differing corporate and unitary structures. This does not mean this is a broken model. The organic and diverse nature of DMO's and the visitor economy support it provides has much value as each area and their offering and needs are different." – DMO, South West*

"To be at their absolute best DMO need to be delivering against a roadmap to becoming a sustainable organisation with income streams from many potential sources: membership, promotions, bookings and including measurable services contract from Local Authorities and LEPS to deliver area promotions, strategic initiatives and roll out business support." – DMO, South West

"I would like to see DMOs funded in such a way that finance is not a distraction to them - their main purpose should be to market their members. It shouldn't be about which member has the deepest pockets either... it should be an even spread across all members so everyone gets an equal amount of exposure." – member of the public, South West

"The current model is predicated on the principle that businesses operating in the tourism visitor economy directly benefit from the development of the sector and fund destination management activities which they benefit from. This is true but it shouldn't exclude the principle that development of the sector via public investment has broad economic benefits. There is currently an overreliance on private investment" – DMO, South West

"Many DMOs currently spend a high percentage of their time chasing funding for their survival rather than supporting tourism" – local authority DMO, South West

"A sensible business plan from each DMO. Local Tourism Businesses have to complete business plans, why not a DMO?" – member of the public, South East

"A clear service level agreement where government set out what it wants to achieve and pays the DMOs to deliver it against a set of KPIs." – Community Interest Company DMO, South East

There were also some (although modest in number **c.3%**) references to potential 'tourism tax' models used elsewhere and business rates relief as means to enable better use of resources and hypothecated returns to DMOs from DMO sector activities:

"There needs to be development of a reinvestment model to return the income generated by the visitor economy in an area, to that area and to support the additional pressures and demands on the destination as a result of visitor numbers. We have outlined some initial funding options in this response, and have done additional research into the tourism levy as an option." – Local Government Association

DMOs and skills, training, support and careers are important and should not be overlooked
Skills, training and support is conveyed in the responses in two distinct ways: firstly, the quality skills, training and support provided by successful DMOs in terms of provision for members (and in the Covid context) non-members/wider participation. Skills here ranged from expertise and knowledge related to regulation to more focused marketing and practical business support development. Secondly, the need for DMOs to invest in skills, training and support for staff and volunteers was highlighted. A number of responses pointed to the

increasingly digitally innovative nature of tourism and destination management, particularly in terms of this requiring new skill sets for DMOs. This was an area where increased engagement with FE and HE providers was cited as a potential way of working (see also next heading), and where collaboration with LEPs and other strategic regional bodies would be efficient, effective and harmonised. There is a distinctive strand in responses which expresses concern about career paths and the attractiveness and rewards of a career in DMO work, including the need for proactive recruitment and work with education providers in terms of placements, apprenticeships and other opportunities to gain exposure to the sector. This is partly contextualised by anxieties about loss of experience within the sector as a result of Covid closures and associated reductions in staffing.

> *"The gaps are strategy, intelligence, business support and planning." – DMO, London*

> *"Improve access to, and participation in, the latest training and develop programmes." – Local Enterprise Partnership, South East*

> *"Lack of capacity, skilled expertise and strategic insight" – Experience provider, Midlands*

> *"Staff burnout due to small teams with loads to deliver." – DMO, South West*

> *"They bring expertise to the party that we don't always have" – Self-catering accommodation provider, East of England*

> *"Further and Higher Education could help with training and improving skills within the tourism sector but this is likely to have a better take up if provided in conjunction with DMO and endorsed by Visit England." – heritage organisation, South West*

> *"DMOs need a revisit on skill sets - to support recovery and rebuild DMOs need the skill sets to rebuild their destination as a business... really capture this build back better approach, both as an organisation and as a sector" – DMO, South West*

> *"Over the next ten years I see the biggest opportunities for DMOs are in relation to levelling-up their destinations, town centres and offer through product, experience, placemaking, training and destination development - with a clear emphasis upon local, unique, bookable, accessible, skills upgrade (employment) and digitally enabled." – Local authority, South East*

> *"Growing the availability of great product at the level of place and job creation and raising visibility onto the careers opportunities within this sector." – Economic development agency, South East*

> *"Leadership skilling up" – member of the public*

> *"need for "inspirational people"" – member of the public*

DMOs working relationships with other organisations (except VisitEngland/Visit Britain) are developing in distinctive, coordinated ways

DMOs in some instances are seen as awkwardly placed in terms of LEPs in particular – overlapping remits or unhelpful tensions are seen to cause difficulties in some cases, although there is also a strong refrain that LEPs and Local Authorities tend to ignore issues of tourism (in the latter case the absence of statutory responsibilities is cited on a number of responses) and this in itself leads to challenges for DMOs in accessing and engaging with them. There are positive examples cited of where Mayoral Combined Authorities may have scaled up engagement in ways that have not often been possible with Local Authorities. This is contrasted with a significant sense of positive (potential) relationships with universities and further education providers at the level of skills and training but also research (i.e. universities and DMOs working jointly on green agendas). There is a further strand of responses (modest in number**, c.5%**, and largely from the local authorities, researchers and members of the public) that push for greater engagement with cultural and heritage organisations to have a stronger presence in future working as part of the broader 'visitor economy'.

> *"The 'gold standard' DMO has very well integrated relationships with other bodies such as Local Authorities, LEP's, BID's, regional National Trust etc. This is built on personalities as the DMO's have no established status." – member of the public*
>
> *"Universities is a key area that could be developed." – local authority heritage officer, Midlands*
>
> *"Collaboration with our local University has been fantastic…. We are working with the University to develop a 'Green Agenda' for our local Council and we have a link from the University to our website to help inform prospective students on the area." – Local authority DMO, East of England*
>
> *"This is all disjointed. They all need to work better together. How needs real thought but the DMOs and Universities should be central as honest brokers and experts" – academic researcher, North East*
>
> *"Where DMOs work closely with LEP Growth Hubs there is an improved business support offer for businesses in the sector and duplication is avoided allowing resource to focus on the gaps in provision" – Economic development agency, South East*
>
> *"A place based approach is vital. All tourism interests are place-based. The DMO should be a powerful hub that draws on other powers - universities, governance, private and voluntary sectors etc." – member of the public, North East*
>
> *"To integrate with universities and other public and private cultural bodies around making places better places for visitors and residents" – academic researcher, North East*

DMOs working relationships with VisitEngland/VisitBritain

There is a consistent theme around the challenges for a variety of DMOs (and the business and groups they engage) to interact with national organisations or for the communication flow to be reciprocal. However, there is a strong endorsement of the role VE/VB have played in the context of Covid: the pandemic has increased visibility, awareness of added value and also removed elements of the "faceless" aspects of the organisations previously felt by respondents. Many respondents **(>30%)** across the sector and respondent types clearly look to VE/VB to fulfil a variety of roles, including as a kind of super-advocate for the sector, an engagement point for local DMOs to central government and national priorities and also as a potential regulator for the sector. Respondents do think that the variety of definitions of a DMO could be aided by a clearer terminology that could be regulated by bodies like VE/VB, and that these agencies should be a fundamental element in the process of agreeing Destination Management Plans for DMOs, regulating performance management and accreditation.

> *"There has to be a clear VE strategy that should be fed down to each regional DMO that in turn should be encouraging small tourism groups to develop so they feed back up the later into it from grass routes. The DMO's strategy has to have scope build into it regional USP that fit into the countries main strategy" – tourism consultant, former chair of two DMOs, Midlands*

> *"Establishment of a new national Strategic DMO Forum, chaired by VisitEngland, to ensure joint working across Strategic DMOs and with the national agencies, and to collaborate on issues such as standardised performance measurement" – Media agency, South West*

> *"My impression is that Visit Britain and Visit England are in a similar situation to my local DMO ie undervalued and underfunded." – tourism consultancy, South East*

> *"We would also like to propose that there should be a dedicated account management system for DMOs with VisitEngland which could help to provide a more strategic and joined up approach." – DMO, South East*

DMOs and business visits/events is untapped and less known aspect of the work

There are a relatively limited number of responses to this area, and many of those who do respond indicate that they were not aware DMOs played a role in these activities. Those that do know about this area of work indicate that they think this is a relatively untapped space for future development but specific skills and expertise are needed; praise is afforded to some centralised initiatives here such as the Convention Bureau in London relating to major events and corporate activities. DMOs are seen as having a key role to play in relation to major events in terms of thinking about an area's offer as a whole, brokering multi-venue arrangements for accommodation, range of experiences and so on. Evidence is provided of this developing in some areas with, for example, the academic conference market.

> *"engage with large scale events" – accommodation provider, North East*

> *"promote their places as great destinations to host business events" – DMO, North East*

“most DMOs do not know much about the business tourism and events sector, so some national guidance would be helpful” – tourism consultant, London

“A lot of work is needed, but the DMO network needs the skills to understand this side of the offer. Those of us who have worked on the ground negotiating and understanding the business tourism landscape, there is a huge opportunity in this field.” – DMO, South West

“it is news to me that they do this” – member of the public

“The role of a convention bureau moves far beyond the simple venue finding and marketing, to enable insights, bid development, strategic alignment with academic and sector strengths. We have recently launched a regional convention bureau that is strategically aligned with academic and core sector strengths.” – DMO, South West

“The Conventions Bureau alone delivered £976k NET revenue enquiries in to the hotel in 2019 post pandemic, without considering a host of large conventions who have hosted events in the city which the wider visitor economy has benefited from. Joint collaborations such as the Newcastle & Gateshead guide and annual visit to The Meetings Show give the hotel an opportunity to market to an international audience which would not be financially viable without the support of NGI and the collaboration of all our partner members.” – International hotel chain, North East

“A DMO needs to become the LEP of the local Tourism Area. Local governance with structured support funding from Government.” – member of the public

DMOs support for government agendas, including recovery and growth in their local sectors could be stronger and more strategic

Perhaps unsurprisingly given responses around funding and relationships with VE/VB, there is a degree of tension related to DMOs delivering government agendas. This is an area where the relevant Question has a high number of nil responses or “I don’t know” comments **(>45%)**; where respondents do engage there is a split between those who consider DMOs are well-placed to deliver on agendas related to greening the economy and levelling up, for example (although with generally little detail on *how* they are well-placed to engage with these themes) and others who consider that the absence of core government funding for their work means it is not the role of DMOs to deliver on government priorities but instead they should remain focused on the needs of their local/regional paying members/subscribers. Elsewhere in responses, however, there was reference to importance of DMOs in *“local place-making”* (not only for visitors, but residents as well) and recognition of the contributions to a broad range of social and environmental agendas.

“DMOs should also be helping to integrate the visitor economy within the wider place economy” – DMO, South East

"There could be a national structure of government-funded regional DMOs, working closely with VisitBritain/VisitEngland, to help coordinate the Build Back Better and post-pandemic recovery agenda, promote and amplify national messaging eg We're Good To Go, Know Before You Go, assist the levelling up of tourism across England (currently 54% of international visitors go to London), help develop national initiatives such as the growth of international conferences and business meeting and use its networks and resources to assist national initiatives." – DMO, East of England

"isn't just about visitors, this about communities, young people, farm 2 fork... this about recognising and working with businesses on climate, inclusion and access. Improvement to transport services, achieve green destination status, improved sector engagement with young people for employment, long term build back planning that has activity and outcomes aligned to a better future for Tourism in the UK." – DMO, South West

"Strategic DMOs also have a role to play in supporting the delivery of local recovery and growth strategies developed by the LEP through supporting productivity and growth projects within the sector, encouraging innovation amongst tourism businesses and working with partners to articulate the skills needs of the sector. " – Local Enterprise Partnership, North West

"Through strategic tourism growth plans, destination management role, place marketing and detailed knowledge of our place DNA. Well positioned to support priorities around the Levelling Up agenda and UK Shared Prosperity Fund. Low carbon and sustainable growth." – DMO, Midlands

"DMOs should be required to have a Destination Management Plan" – natural environment organisation, South West

DMOs and future issues: greening tourism, climate change, sustainability needs
Funding is clearly the dominant theme across responses: there is a firm sense of the perceived vulnerability of the DMOs in the current climate with an absence of regulated, sustained and multi-year funding as a core budget alongside the issue that even those DMOs who are very successful in generating resources from subscription/membership models are now reliant on those fees from a sector that has limited capacity and a reduced resource to allocate. Alongside funding, however, there is a distinctive strand of commentary which suggests ways in which greater coordination of national plans locally delivered could result in new offerings and opportunities: there is a strong narrative around green agendas, using DMOs to engage in place-based development, and sustainability, ranging from more proactive management by DMOs of the natural landscape offering as a means to diversify from very successful urban initiatives and the impact of this on issues such as transport planning, transport hubs and other infrastructural issues. This is most often placed into the context of considerations about a more sustainable offering for domestic tourism in terms of thinking about different approaches to non-peak seasonality; green economy issues are raised in these responses. For example, responses highlight that even in a Covid recovery context increasing international tourism may not sit comfortably with targets around carbon emissions, so new approaches to domestic tourism, embracing cultural and heritage aspects or exploring digital experience

tourism may be a greater priority in the medium to longer term. There are also comments about the need to constantly evolve the tourism – and DMO – offer, particularly in relation to the expectations, needs and interests of younger generations, or newer markets.

> *“DMOs can also have an overall visitor economy “stewardship” role, factoring in the importance of community and environmental impact as part of the sustainable economic growth agenda.” – local authority DMO, South West*

> *“Ensure that Green Tourism lays at the heart of all strategies and work” – heritage organisation, South West*

> *“DMOs can use the pause in international visitors to reengage with residents and facilitate the conversation on ‘why do we want tourism?’. This will enable DMOs to start a process of realigning towards resident needs, and towards destination management, with tourism understood as a means to an end. DMOs can now look to identify new measures of success that go beyond visitor numbers and overall spend, recognising the true value of tourism - both its costs and benefits – with an understanding of how it will contribute to a destination’s health and community wellbeing.” – tourism NGO, national*

> *“Breaking into the GenZ market and the rise Gen Alpha and making sure we know how to market to them” – local authority, South West*

> *“Currently, the main focus for DMO’s is on marketing. To secure the future of the sector consideration is also needed for zero carbon, infrastructure, product, skills and workforce; therefore the DMO remit needs to broaden to make this happen.” – Local Enterprise Partnership, South West*

> *“Managing the impacts of continued growth in visitor numbers, and decarbonising to meet 2030 climate targets.” – tourism NGO, national*

Response Data

Survey submissions

Total survey download	Total surveys containing at least one substantive response	Minus duplicate/identical responses by same submitter	Total usable responses*
894	293	289	289
		Number of responses non-quotable by request	29
		Number of quotable responses	260

Response completion data for survey submissions: *number in parentheses is cumulative total*

Number of responses	Number responding to all free-texts questions	Number responding to less than 100% but at least 75% of free text questions	Number responding to less than 75% but at least 50% of free text questions	Number responding to less than 50% but at least 25% of free text questions
289	81	117 *(198)*	19 *(217)*	34 *(251)*

Most non-survey responses submitted via the mailbox or emailed documents did not use the questionnaire structure so a comparison on % of respondent areas is not possible.

Non-survey responses

Submission route	
Mailbox	18
Emailed / document submission	38

Note: the majority of responses to the mailbox related to the same regional DMO grouping in the North East of England – for example, a joint letter from the 7 North East Local Authorities in addition to individual submissions. The overlapping statements and the fact that some of the submissions were presented as statements of support for documentation submitted by other members of the same region suggests that this response route was well coordinated.

Respondent types (usable responses only and minus duplications)

	Survey	**Other submission**
DMO	74	2
Other organisation	177	53
Member of the public	38	1

Other organisation classification includes (figure in parentheses are the additional responses from non-survey submission route); note that not all respondents selected a categorisation and in other instances multiple classifications were selected – in those instances, we have used that most closely aligned with the organisation's activities

Organisation	Responses
Academic organisation	2 (4)
Accommodation provider	29 (5)
Business	18 (12)
Experience provider	7 (0)
Heritage or cultural organisation	26 (2)
Hospitality sector	8 (3)
Local Authority	31 (8)[1]
Local Enterprise Partnership	10 (1)[2]
National organisation	3 (11)
Tourism sector stakeholder	14 (6)
Transport provider	5 (2)
Travel agent/tour operator	8 (2)
Visitor attraction	13 (0)

Regional classification of responses (figure in parentheses are the additional responses from non-survey submission route)[3]

Region	Responses
East of England	41 (0)
London	5 (0)[4]
Midlands	29 (3)
North East	16 (28)
North West	41 (5)
South East	27 (3)
South West	71 (2)
Scotland	1 (0)
National / nationwide	20 (12)
Not known	38 (1)[5]

[1] This represents the number of unique Local Authority responses i.e. excludes duplicates from the same LA.

[2] This number represents 11 unique LEP responses (i.e. 11 different LEPs).

[3] The survey set up did not require respondents to provide location details, so based on the materials we were provided with post-survey completion in this analysis we have had to group locations based on organisation details and/or undertaken separate search activities to identify regional locations.

[4] The London based figure may be lower than expected: this is because where an organisation's HQ is in London but the response indicated submission from a 'national' organisation, they are counted under the 'National / nationwide' figure.

[5] 'Not known' includes some members of the public and small businesses where it has not been possible to ascertain location i.e. a guest house which has the same name as several different businesses. Where possible we have undertaken searches but have stuck with the classification 'not known' where we cannot be conclusive.

DMO Best Practice Case Study Examples
Best practice vignettes – these are drawn largely from responses to the Best Practice Question in the survey and based on instances where at least 5 responses have referenced a particular success or best practice narrative or activity in relation to specific DMOs. We have provided these examples by broad theme.

Efficiencies and effectiveness
Visit East of England is seen to deliver a strong example of where increased efficiency has been achieved around "back office" functions. In the case of Visit East of England, it *"runs a single back office for [itself], Visit Suffolk and Visit Norfolk"* which has been self-funding for over 3 years, which has *"saved the county councils and LEP a combined £160k pa and considerably more from when the county councils operated internal tourism departments."* *(DMO, East of England)* The collaboration on internal processes has been perceived as allowing a refocusing of resources, energy and attention towards greater delivery including in skills, recruitment to careers in the sector and marketing to customers: "*Creating a Visitor Economy Skills Group to start changing the narrative of the sector as 'low skilled, low paid and seasonal' [and] creating a coalition of all local DMOs with a joint marketing budget to promote the region as a whole with a new brand - 'Unexplored England' …the first time all the local DMOs and local authorities have worked together on a tourism promotion." (DMO, East of England)* In terms of customer experience, the single *"online platform for accommodation platform for accommodation booking at a reduced cost to the accommodation provider and supporting local business" (Local Enterprise Partnership, East of England)*.

Similar fusions of providers in terms of alliances and deepening partnerships can be seen in the North East, where the *"partnership between North York Moors National Park and North York Moors Tourism Network"* is seen as ideally *"public/private sector … managing to undertake the dual DMO roles of destination management and marketing, with excellent business support and high levels of engagement, good recognition of the needs of both visitors and residents, while paying close attention to the environment - all at a very low cost to the tax-payer." (Tourism organisation, national)*

Joining up representation
The All About Ipswich DMO has a seat "*on the Ipswich Vision board alongside the MP, the local authorities, the BID, the university, the LEP and the Chamber of Commerce" (DMO, East of England).* This is seen to positively ensure join up and inclusive approaches for policy agendas. The grouping around strategy has successfully attracted £25m from the Town Deals Fund to revive the area, including over £2m to enhance digital provision in the town centre and wide region. This is viewed as having potential to "*dramatically improve the reach of the DMO and improve the experience of visitors to the area. By working with local partners through the Vision coalition, the DMO will have brought substantial investment and development at no additional cost to members."* (DMO, East of England) Recognising that it has issues about inclusion and representation, and needs to do more to "*reflect society"* (transport provider, East of England), All About Ipswich is focussing on developing its governance models to ensure it "represents the diversity of the visitor economy" (DMO, East of England). This is true of the needs of other DMOs to also look at membership of governance structures, *including "drawing in more young people and more diversity into the board and*

ensuring new voices are heard would be an area to develop." (cultural organisation, North West)

New models, new needs, new forms of working

Formed in 2018, the Experience West Sussex Partnership is funded by Chichester local authority but seeking a new sustainable funding model by the end of 2022. It grew from partnerships and collaborations centred around the local LEP, the Coastal West Sussex Partnership. It is already seen as having delivered benefits to the local area by providing a *"collective voice for West Sussex to DCMS, Visit Britain and Visit England" (DMO, South East)* on the one hand and distinctive improvements on the visibility of the tourism economy to the LEP *(also cited by local authority, South East and Local Enterprise Partnership member*); new marketing opportunities via the Gatwick Gateway Group, including over £100k of marketing; resilience and knowledge for impact studies during Covid-19; and a new and growing digital PR programme across the county driving over 37,000 business leads in 2020 via their online platforms and coordination with local business groups, the LEP and other sector bodies, and reopening promotional materials for 2021. It has also generated new cross-border partnerships with neighbouring areas, consolidating and harnessing expertise and shared areas of interest, including county-wide campaigns on opportunities such as tour operations and sustainable digital demand responsive travel options with DMOs in Brighton, East Sussex, Kent and Tourism South East. During Covid lockdowns, this included creation of a #ShopSussex designated web presence to sell merchandise, local produce and artisan products from the region.

Regional strategies with an ambitious and knowledge-based outlook

The Newcastle Gateshead Initiative is recognised as having provided sustained support via regular Tourism Industry Panels during Covid-19 to help better understand industry needs and improve responsiveness. This builds upon the NGI's reputation for engaging and listening to partners in previous and current work, such as the *"Tourism Zone bid by NGI led partnership with the NELEP" (member of the public, North East)*. The NGI is viewed as both a strategic resource for intelligence, knowledge and expertise alongside initiating new collaborations across the region's LEPs, universities and major transport and tourism hubs. Investment in dedicated resources that are accessible to the industry are seen as key to this leadership role, which extends in influence beyond the North East: "*Newcastle Gateshead Initiative have put an online tourism statistics database (T-Stats) at the centre of their decision making - providing a centralised intelligence source. Other destinations that have followed suit and benefited include Cumbria Tourism, Visit Greenwich, Visit Cotswolds, and Make it York." (Tourism Development Consultancy, national)*

International attractiveness and local trust

Shakespeare's England undertook extensive work on the delivery around the Commonwealth Games to ensure all interested parties were enabled to provide a coherent consumer offering on the international stage *(tourism attraction, national);* this included a clear marketing strategy and source of planning and development support. This placed the organisation in a strong position as a trusted, supportive, and sector-focused advocate during the pandemic: "*the work Shakespeare's England have done to support its members during the pandemic has been incredibly reassuring. We've been listened to and we've been connected to the people that can help provide us with the support that we need to survive. DMOs in general need to* *improve in so many different ways but I'm pretty confident that we wouldn't be here today without our involvement with our local one." (tour operator, South West)*

In the North West, Manchester Central and Marketing Manchester have been viewed as driving partnership working to attract major international events to the city and wider region. The bodies *"work in tandem to research, target, bid for and win international business events (challenging as this is when other countries, including those in the UK, have additional funding)" (events management venue/business, North West)* The catalysing and convening power of these DMOs is seen by their users as "exemplar" in nature partly because they are able to fuse – at scale – the kinds of local, national and international partnerships required for the 21st century: *"Marketing Manchester is an exemplar DMO in the UK, operating within a strong network of local and national partnerships and is central to achieving both local and national policy ambitions."(Local Enterprise Partnership, North West*) Similarly, work in the Lake District is seen as driving new international markets with dedicated support for *"Private Sector Marketing and Sales Initiatives … [such as] Cumbria Japan Forum, China Forum, US Forum"* alongside proactive *"Lobbying at a national level"* too (*tour operator, North West)*.

Enhancing skills and attracting new talent

The role of DMOs in delivering training and new forms of support to enable digital upskilling comes in for particular praise in terms of advancing the strengths of small businesses in accessible ways in particular: *"Bringing far greater digitalisation and online working to many small businesses and sign posting them to free workshops and business support"*. (DMO, Midlands) In the South West, this was seen to help the hospitality industry and local producers via ***"****The creation of a food app for North Devon that created national and international interest in the regions quality from field to plate". (member of public)*

In the North West, the "unique" Lancashire Ambassadors' programme brings together a group of private sector companies *"beyond tourism and hospitality"* to invest in the promotion of Lancashire. These ambassadors *"include BAE Systems, Barnfield Construction, Blackburn Rovers, Booths, Conlon Construction, Forbes Solicitors, Panaz, Scorpion Automotive, Stonyhurst, WEC Group and VEKA*". Investment from these bodies has served not only to advance the profile of the county, but also to enable "*Marketing Lancashire to create a dedicated talent attraction campaign, which features all the assets we would promote to a potential visitor and more. These businesses would not invest if they did not believe those funds were working hard for the benefit of the county."* (Local authority, North West) The investment is viewed by regional leaders as part of the wider contribution of the region to *"place promotion … within the Northern Powerhouse and the wider promotion of UK PLC" (Local authority, North West)*

Responding to local business needs

Experience Oxfordshire which one respondent commented represented *"an example of resilience and entrepreneurialism working against all the odds" (heritage attraction, South West)* has been an asset in influencing policy makers and tourism providers to think creatively and openly about specific challenges faced by local businesses. This responsiveness is conveyed in the story of one small hotelier who "suggested that having a bus service that went around the hotels taking people to attractions and the city centre would be useful". Spotting the potential of this to add greater connectivity to a range of business and organisations, the DMO used this as a starting point to begin discussions across stakeholders, from other hotels to the local bus company: *"Experience Oxfordshire did not dismiss the idea, they took the idea seriously and are progressing it by working with all relevant organisations. It is that ability to listen and act on good ideas that makes them special." (accommodation provider, South West)*

Building sectoral partnerships for enhanced capacity, influence, and resilience
The Great South West Tourism Partnership brings together multiple agencies in *"an inclusive, equitable alliance"*. While it is not an organisation with a formal constitution, it convenes and empowers a cluster of local bodies across the entire South West region, including commercial, tourist, heritage, natural environment and Local Authority and Business Improvement District bodies. With a focus on "*a stronger, more productive, resilient and valuable tourism and hospitality network for the Great South West region"* the partnership has grown organically over a number of years. The Covid-19 pandemic demonstrated its strategic value at the same time as extending its reach. During the lockdowns of 2020 and 2021 it has delivered support to more than 100 businesses via training, support and surgeries and masterclasses. It played a pivotal role in supporting public health agencies, policing and law and order and local businesses as the economy has gradually re-opened, including authoritative advice and guidance to many businesses of different scales. This has been possible via strong working relationships with the region's LEPs. (*Local Enterprise Partnership, South West)*

Future challenges: sustainability and environmental issues
The National Forest Company has been developing a set of guiding principles for the sector in relation to sustainable models of tourism. These focus not only on the National Forest assets themselves but the wider natural environment, dealing with themes such as openness, conservation, inclusiveness and access to the forest environment by all and an ethos that works through into 'Forest towns' and visitor hubs. Using the concept of the 'forest economy', there is an emphasis on place, local products and cultures, skills, heritage and the sustainable use of the environment to generate new enterprises and experiences within a circular economy. This includes producing a new "*Sustainable Tourism Accommodation Guide which has been developed with businesses and local authority partners, including planning teams to encourage more sustainable tourism accommodation in the Forest. It has seven principles …*

- *Develop in harmony with the Forest character*
- *Design for health and wellbeing*
- *Support the Forest community and economy*
- *Build ethically & sustainably*
- *Promote carbon emission free holidays*
- *Integrate with nature*
- *Water is precious for people and nature" (visitor destination, national organisation*)