

THE PAST, PRESENT AND FUTURE OF DESTINATION MANAGEMENT ORGANIZATIONS (DMO) – THE EXAMPLE OF NATIONAL TOURISM ORGANIZATIONS (NTO)

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ABSTRACT

The present article covers an evolution of national tourism organizations (NTOs) that play the role of national destination management organizations (DMOs). First, the history was depicted of NTOs including an indication of the periods when they were coming into existence as well as their development, while at the same time defining the differences that occur between the individual regions of Europe. In the further part, selected assumptions were presented connected with the current forms of these organizations, i.e. the scope of tasks realized and the problem of expenditures related to their operations. Also, the potential directions were indicated of the development of the organizations examined while presenting a shift from a strictly marketing orientation into comprehensive management of the destination. The study was preceded with a theoretical analysis of the following notions: national tourism organizations and destination management organizations.

KEYWORDS: *destination management organizations, national tourism organizations*

JEL CLASSIFICATION: *L83, L30*

1. INTRODUCTION

The proper development of modern tourism is determined by many factors. It can be accepted that basic factors include spatial determinants, social and psychological factors, economic factors, demographic factors and political factors. The structure of political factors includes “the formation and realization of the tourism policy” (Szwichtenberg ed., 2000). Tourism policy may be understood as “(...) a conscious influence of the government and other entities on tourism, realized within the framework of the overall economic policy of the state, which consists in the determination of economic and non-economic (e.g. social or ecological) goals and a selection of appropriate measures and methods which are essential to their realization” (Borzyszkowski, 2005). The way in which the tourism function will be formed in a given destination depends chiefly from the activities of specific entities which are responsible for the tourism policy. Such a situation occurs independently of the destination type (i.e. the local, regional or national one).

Competent entities which deal with the tourism policy of a given country (i.e. a national destination) play an essential role in modern tourism. The existing competition on the tourism market induces individual states to undertake proper activities aimed at strengthening the competitiveness of the destination. In the majority of the European states, the so-called national tourism organizations (NTO) are to a significant extent responsible for this sphere. It is accepted that those organizations perform the function of the so-called national destination management

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organizations (DMOs), i.e. those entities which are responsible for marketing and management related to a destination.

The present article covers an evolution of national tourism organizations. Their historical and current development was indicated; also, the potential directions of their further development were signaled. The study makes use of the studies that have been conducted so far and that cover the issues in question. The results of the author's survey that was carried out in relation to a group of 25 national tourism organizations from Europe was also of an essential significance to the content of the present study. This survey was carried out with the use of a questionnaire form in the years of 2013-2014 as well as during the interviews made by the author with the personnel of the individual NTOs during ITB tourist fairs in Berlin in the years of 2013-2015.

2. LITERATURE REVIEW

2.1. The meaning of destination management organizations (DMOs)

The realization of the specific activities in the scope of tourist policy requires specific undertakings on the part of individual countries. It is accepted that an appropriate organization of those structures that are responsible for tourism is of an essential significance in this respect (Wodejko, 1997). A review of the experiences of many European countries demonstrates that the so-called destination management organizations are of a particular importance in the majority of them.

One may observe that individual authors differ in the interpretation of the DMO name: concerning "M", some talk about "marketing" (destination marketing organizations), while others refer to it as "management" (destination management organizations). The supporters of the formulation of destination management organizations claim for example that over the past years, DMOs have undergone a number of transformations, and from typically marketing organizations, they have been transformed into entities with a comprehensive approach in the sphere of tourism management (Presenza 2005).

A review of various scientific and other studies demonstrates a significant diversity in the understanding of DMOs (regardless of the fact whether this concerns the formulation of "marketing" or "management"). DMOs are defined by the World Tourism Organization (UN-WTO) as "(...) those organizations which are responsible for management and/or marketing of individual tourist destinations" (*Survey of destination...*, 2004). According to Gretzel, Fesenmaier, Formica and O'Leary (2006), DMOs are non-profit entities which aim at the generation of the visits of tourists in a given area. Padurean (2010) speaks about an organization which is responsible for the management and coordination of all the activities in a destination including planning and promotion.

Generally speaking, it should be accepted that DMOs are basic entities that realize the tourist policy of a given destination. Apart from activities of a marketing nature (including chiefly promotion), they are responsible for a number of other objectives connected with the development of a destination.

It needs to be emphasized that DMOs can occur on various levels of administration in a given state (depending on the accepted division of the country). In general, DMOs occur on the following levels: local, regional and national. In the case of national entities, the so-called national tourism organizations fulfill the functions of DMOs.

2.2. Notion and activities of national tourism organizations (NTO)

In the majority of European countries, there exists a peculiar duality in the organization of tourism at the national level. There are usually two entities that are responsible for the issue of national tourism policy, i.e.: the national tourism administration (NTA) and the national tourism organization (NTO) (Borzyszkowski, 2005).

The first of them is a government administration body which is responsible for formulating the tourism policy within the framework of the general economic strategy of the state administration (Zawistowska, 1999). The UNWTO (*Tourist Images...*, 1979) introduced the term national tourism administration (NTA) as: "the authorities in the central state administration, or other official organisation, in charge of tourism development at the national level". Another definition specifies the NTA as "(...) a government body that performs the function of a coordinator of the tourism policy of the state" (*Tourist promotion...*, 1999).

In the majority of countries, the other entity, i.e. the national tourism organization (NTO), has taken over a significant part of responsibilities for the national tourism policy. NTO is the body highly responsible for the formulation and implementation of national tourist policy (Jayapalan, 2001) NTO is defined by World Tourism Organization (*The future of...*, 1999) as the "(...) autonomous body of public, semi-public or private status, established or recognized by the state as the body with competence at national level for promoting inbound international tourism". Mill and Morrison (Morrison et al., 1995) made this definition concrete by saying that "NTO is the organization officially responsible for the development and marketing of tourism for a country". According to Chandra and Menezes (2001), NTOs are organizations entrusted with the responsibility for tourism matters at the national level. Medlik (1995) considers an NTO "... to be an official body being responsible to various extents for the development, promotion and coordination of tourism in a given state, which is recognized and also financed to a certain degree by the government". Borzyszkowski (2005) presents a similar opinion; he claims that it is an organization of public and private cooperation, which is financed to a considerable extent from the state budget. It is mainly responsible for the tourist marketing of the target country and other operational functions (including the development of tourist products and tourist information). Pike (2008) states, that NTO is "(...)The entity with overall responsibility for marketing a country as a tourism destination (...)". NTOs are organizations which the government has entrusted with the responsibility for tourist issues on the national level (Middleton, 1996). It is generally accepted that an NTO is an entity with an overall responsibility for marketing a country as a tourism destination (Pike, 2004).

To sum up, it is worth mentioning that the abovementioned division into NTO and NTA does not occur in all states. In some states, until today no typical NTO has been distinguished. Examples include Bulgaria and Turkey. In countries of this type, functions connected with tourism marketing are performed by the competent bodies of government administration, i.e. national tourist administrations (NTA). Thereby, NTAs realize traditional tasks that are assigned to NTOs. However, this situation is relatively rare: in a definite majority of European countries, NTOs and NTAs have been distinguished.

3. HYPOTHESIS AND METHODOLOGY

The following hypothesis was accepted in the present study: national tourism organizations (NTO), that perform the function of national destination management organizations (DMO), exhibit significant transformations including the scope of their objectives and expenditures incurred.

An analysis of the issue undertaken was carried out in two directions. In the first order, the available scholarly literature was studied that makes references both to theoretical issues connected with DMO and that points to the issues of NTO. In this scope, it was determined how the scope of the objectives of the organizations examined changed within the span of years and decades. The available scholarly literature allowed the author to distinguish three research periods, i.e. the past (that covers the moment of the formation of NTO and the first years of their functioning), the present period and the coming future.

The results of the author's survey that was carried out in relation to a group of 25 national tourism organizations from Europe was also of an essential significance to the content of the present study. This survey was carried out with the use of a questionnaire form in the years of 2013-2014 as well

as during the interviews made by the author with the personnel of the individual NTOs during ITB tourist fairs in Berlin in the years of 2013-2015. The research results obtained permitted an assessment of changes in the volumes of NTO budgets from West European and Middle and East European countries. The analysis of this phenomenon was made based on data from the years of 2006-2013. Thereby, it is not only overall changes in the activities of NTO that were presented in the article but also certain differences were indicated between the organizations from the two regions of Europe.

4. THE HISTORY OF NATIONAL TOURISM ORGANIZATIONS

The history of NTOs in Europe demonstrates that they were first established in highly developed states, including France (1910), Italy (1919), Germany (1948), Austria (1955), Denmark (1967), the Netherlands (1968) and Great Britain (1969) (Borzyszkowski, 2005). The process of the creation of NTOs nevertheless started considerably sooner: "(...) the establishment of the New Zealand Department of Tourist and Health Resorts in February 1901 represented the world's first NTO" (*75 Years of Tourism...*, 1976). Generally speaking, the first NTOs in Europe came into existence as early as before the Second World War, yet the greatest number of them were created in the post-war period. In the majority of the states of the so-called Western Europe, national tourism organizations have several dozens of years of history, and thereby significant experience in running activities aimed at the marketing of a given country. Thus, it can be stated that in this respect they "supersede" organizations from post-communist countries. The process of NTO creation was observed much later in the so-called countries of the former communist block:

- Hrvatska Turistička Zajednica (Croatia) – 1992;
- Česká centrála cestovního ruchu – CzechTourism (Czech Republic) – 1993;
- Enterprise Estonia (Estonia) – 2000;
- Magyar Turizmus Zrt. (Hungary) – 1994;
- Nacionalna turistička organizacija Crne Gore (Montenegro) – 2007;
- Tūrisma attīstības valsts aģentūra (Latvia) – 2002;
- Polska Organizacja Turystyczna (Poland) – 2000;
- Туристичка Организација Србије (Turistička organizacija Srbije) (Serbia) – 1994;
- Slovenská agentúra pre cestovný ruch (Slovakia) – 1995 (Borzyszkowski & Marczak, 2011).

It can be assumed that the formation process of national tourism organizations in post-communist countries started in the very period of the economic transformation, i.e. in the early 1990s. However, it was not even: in various countries, it took on different forms; above all, it took place in different periods. Thereby, the collapse of communism did not mean an automatic commencement of the creation process of NTOs. Poland, where the NTO was established on the day of 1 January 2000 on the grounds of the Act of 25 June 1999, can serve as an example here. However, the activities aimed at its setting up were initiated in the early 1990s.

It is also worth to mention that the history of organizational structures responsible for tourism simultaneously shows that national tourism organizations in the first years (and even decades) of their existence were strongly dependent on the government (i.e. the central government administration) (Borzyszkowski, 2005). Łazarek (1972) emphasizes that the unity of purposes and interests lead to such strong (...) ties with the government that NTOs were recognized as official bodies entitled to support tourism, and as such they were equipped by the government with the competences of national tourism offices as if they were the government administration bodies responsible for tourism".

It is worth mentioning that from the historical perspective, national tourism organizations were established to realize specific objectives of national tourism policy. The realization of the so-called tactical activities centered chiefly around the tourist marketing of a given country was the main

objectives of their activities for many years. In this respect, primary activities focused on promotion and, to a smaller degree, on the development of tourist products and tourist information. In the case of the majority of NTOs, the remaining activities were either of lesser importance or even of marginal significance (Borzyszkowski, 2005).

5. PRESENT FORM OF NATIONAL TOURISM ORGANIZATIONS

The primary role of a NTO is to promote a country as an international tourism destination and to increase visitor arrival numbers for that country (Case, 2003). Middleton (1996) states that each NTO has an option of two strategies: a promotional one or a supporting one. The first one of them involves the realization of promotional programs aimed at transmitting the image of a given country and the main promotional slogans to the target segments of potential visitors. Decisions concerning the assignment of a greater part of the budget for the purpose of the promotion of a positive image and an awareness of a given country constitute the most obvious and convincing of all the directions of the activity of an NTO. In this case, we deal with the applications of the basic promotional tools. The other strategy concerns activities for the support of the tourism industry.

According to Pearce (1992), critical NTO functions are marketing and development alongside planning, visitor servicing, research, coordination and lobbying. According to Bhatia (2006), the national tourism organisation is likely to be concerned with four broad areas: administration, production, marketing and financing. Choy (1993) adds that their priorities should evolve over time and development, marketing, management or innovation take precedence in accordance with the phase arrived at in the product life cycle. In addition to marketing responsibilities, NTOs have developed other functions. In the developing world they are often used to encourage and facilitate product development, acting as a conduit for government grants and subsidies designed to increase the nation's offerings and competitiveness (Murphy & Murphy, 2004). What is more, crisis management has become another essential competence, its relevance underlined by the heightened terrorism threat of the past decade and the vulnerability of tourism to associated dangers (Henderson, 2004). What is interesting, Jayapalan (2001) states that research is the basic function of an NTO. Furthermore, NTOs should be responsible for other tasks including the following: "information and promotion within a country, regularization of standards of lodging and restaurants, control of activities of private travel agencies, publicity overseas, technical and juridical problems, international relations, development of selected areas and overall tourism policy and promotion" (Jayapalan, 2001).

According to Chandra and Menezes (2001), NTOs play a complementary role to the marketing efforts of individual agencies and organizations involved in providing tourism products and services for a given destination. The typical NTO plays the role of a promoter and a facilitator in the marketing of a destination.

Nonetheless, a range of functions has emerged in NTOs, such as marketing, development, planning and research, but the dominant function by far is to promote the national product to overseas markets (Murphy & Murphy, 2004). Thereby, a national tourism organisation plays a leading role in direction and promotion of tourism (Sajnani & Goswami, 2002). Batchelor and Middleton (Chandra & Menezes, 2001) find that NTO's tasks are:

- research the relevant current and emerging markets and develop market intelligence;
- forecast demand;
- identify markets and segments having the best potential;
- establish promotional priorities;
- project the appropriate destination image to the targeted markets;
- provide destination information to interested parties;
- provide advise on product development and improvement to a variety of tourism organizations;

- create cooperative marketing campaigns in collaboration with other tourism organizations;
- monitor tourist/visitor satisfaction.

An analysis carried out by Borzyszkowski and Marczak (2011) concerning the primary objectives of 10 NTOs from post-communist countries served to confirm the characterization above. It becomes evident that the most important statutory objectives and tasks of these organizations include the following ones:

- tourist promotion (creation of the tourist image of a specific country, publishing of promotional materials, preparing and implementing yearly plans and programs of promotional activities);
- issue of an improvement of tourist information and a creation of its system;
- supporting a number of entities which deal with the creation of tourism in a country and a cooperation with these entities;
- tourist education;
- sustainable development of tourism;
- development of tourist products;
- market research in tourism.

To sum up, due to a clear diversity of the legal and organizational forms of NTOs, one cannot speak about the so-called "typical model" of this organization (Pike, 2008).

Nevertheless, a review of the objectives of the present NTOs demonstrates that the primary objectives of these organizations focus on widely understood tourist marketing: mainly in the area of the promotion or development of a tourist product. There is a growing emphasis on other undertakings connected with the development of a given destination (e.g. tourist education or sustainable development of tourism). The observations made by the author have demonstrated that this situation takes place chiefly in organizations with long-standing traditions, i.e. mainly in NTOs from West European countries.

One of more important aspects connected with the operations of national tourism organizations is the issues of financial expenditures which are at their disposal. The many years of observations made by the author demonstrate that there occurred significant changes in this area. It is especially evident in the case of a comparative analysis of organizations from two regions of Europe, i.e. West Europe and post-communist European countries (Middle and East Europe). While at the end of the 20th century and in the first years of the 21st century, there were great disproportions between these entities (in favour of West European countries), it has been observed in the recent years that these differences are decreasing. The calculations made by the author on the example of 25 European NTOs (17 from West Europe and 8 from Middle and East Europe, i.e. the so-called post-communist countries) demonstrated that in the years 2006-2013, the average size of the budget of NTOs from West European countries rose from EUR 55.4 million to EUR 55.9 million (i.e. 0.9%), while that of NTOs from Middle and East Europe grew from EUR 11.2 million to EUR 19.1 million (i.e. 70.5%). It can be seen that there are significant differences in the sizes of budgets between entities from both regions, but in the period analyzed, there was a clear reduction of these disproportions. Thereby, organizations from Middle and East European countries gain growing funds for their operations.

At this point, it is worth to ask this question: why is it that in the case of organizations from post-communist countries one may talk about such a clear increase of budget levels? A deeper analysis may point to at least several causes of this phenomenon. Firstly, it should be remembered that the tourist economies in post-communist countries were subordinated to the rules of centrally controlled (socialist) economy until the 1990s. It is justly accepted that in relation to the majority of the countries of the so-called Western Europe, the activities in the scope of tourism development or promotion were clearly delayed. The process of the economic transformation in 1990s coincided with the creation of national tourism organizations. In view of the fact that these were the first and frequently difficult years of transition to free market economy, the situation looked similar in the case of tourism marketing operations, which were conducted at the national level (that is by NTOs).

At first, these were fairly weak organizations as concerns organizational and financial aspects. It was only later that a clear increase was observed of the significance of NTOs in the creation process of the tourism policy of post-communist countries, which was expressed e.g. by an increase of budget levels of these entities.

The accession to the European Union is the second important reason. The largest number of post-communist states acceded the European Union in May 2004. Bulgaria, Romania and Croatia acceded in the subsequent years. The possibility to use EU funds in many post-communist states was also properly taken advantage of by individual national tourism organizations. For example, in the years of 2008-2011, the budget of the Polish Tourism Organization rose by 173%. Such a significant increase of expenditures did not result from an increase of the specific subsidy from the government budget (which even decreased by 10%) but from obtaining EU funds (within the framework of activities under Operation Programmes): a total of PLN 70.9 million in the year 2011 (Plan działania..., 2010). There was a similar situation in the case of CzechTourism, the national tourism organization in the Czech Republic: in the years of 2008-2010, the budget increased by 56% mainly through the use of EU funds. It is worth emphasizing that in the year 2008, the organization did not disclose any UE funds in the budget structure; in the year 2009; these constituted 5.1%, and in the year 2010: as much as 26.7% of all the funds of the organization (Výroční zpráva..., 2009; Výroční zpráva..., 2010; Výroční zpráva..., 2011). The situation presented above demonstrates essential changes in the financing structure of NTOs from post-communist countries. It is worth remembering that even in the years 2000-2001 practically in the majority of these organizations government budget funds constituted the only source of NTO budgets (Borzyszkowski, 2005). This means that these organizations were totally dependent on public funds. This led to certain types of threats. For example, in the year 2002, when significant savings in the government budget were introduced, the funds of the Polish Tourism Organization (the Polish NTO) were reduced from EUR 11.1 million in the year 2001 to EUR 7.0 million in the year 2002 (Borzyszkowski, 2005).

Obviously enough, it is not only post-communist countries that use EU funds. For example, the high increase of the budget of the Northern Ireland Tourist Board in the years of 2009-2010 (by over 45%) resulted from the use of special EU funds (known as the Titanic Foundation Limited): in the year 2009, this constituted GBP 1.2 million (6.7% of budget) and a year later: GBP 9.3 million (34.6% of budget) (Annual Report 2009/2010..., 2010). Regardless of this, the skill to use of EU funds by NTOs from the post-communist contributed in many cases to an evident increase of expenditures related to their operations.

6. FUTURE OF NATIONAL TOURISM ORGANIZATIONS FROM THE COUNTRIES EXAMINED: AN ATTEMPT TO ASSESS TENDENCIES IN THE COMING YEARS

Independently of the NTO type and the area of their occurrence (post-communist countries, West European countries), it is assumed that the directions of changes in their activities will be in line with the assumptions attributed to the so-called destination management organizations (DMO), i.e. those organizations that are appropriate for marketing and management in a given destination. Several following assumptions can be attributed to this process:

- more intense use of the latest information technologies, which involves designation of more funds to design and develop websites (Mich, Franch & Marzani, 2004), construction and development of on-line booking systems (Çetinkaya, 2009) or the development of tourist products with the use of information technologies (Ma, Buhalis & Song, 2003);
- increasing care in relation to the activities addressed to a potential recipient, the so-called 8P, i.e. product, price, packaging, programming, promotion, place, people and partnership (Morrison, 2010);

- other activities oriented towards the problem of comprehensive destination management, including emergency management (Küçükaltan, 2006) and development of public and private cooperation (Majewski 2007; Gretzel, Fesenmaier, Formica & O’Leary, 2006).

Business tourism will certainly be gaining in significance in the activities of NTOs. This results among others from the fact that it is this part of tourism economy which is particularly dynamically developing. Moreover, business tourism generates a significant part of income from tourism (Gaworecki 1997). It is estimated that ca. 14% of all tourist trips all over the world are related just to business tourism (*Tourism Highlights...* 2013). Therefore, in many countries, the so-called convention bureaus, that is special entities (usually within NTO structures) were created to deal with marketing at a specific destination. Their main purpose is to increase the number of events, conferences and business meetings (Working with..., n.a.). Even now, in the majority of NTOs from post-communist countries, this unit has been isolated.

Tourism (and also NTOs themselves) from post-communist countries can enjoy many other possibilities. It is worth mentioning that these countries have been recently the organizers of great sports events which, as it is commonly known, constitute a strong generator of increased tourism traffic and tourism expenses (Fourie & Santana-Gallego, 2011; Greig & McQuaid, 2004). In the year 2012, Poland and Ukraine organized the UFA EURO 2012 European Football Cup, while Russia is the host of other great events (2014: Winter Olympic Games in Sochi, 2018: the FIFA World Cup). These events offer not only a possibility to develop the tourist function but also an opportunity to conduct deepened activities of a promotional nature (that NTOs are responsible for). It can be assumed that in many aspects connected with the development of the tourism market (both concerning supply and demand), the role of Central and East Europe will be increasing. The same may concern the operations of NTOs from the countries of this region.

The general assessment allows one to state that the organizations examined have gone through a number of changes in the recent years and decades (including changes to the emphasis in the operations philosophy from “marketing” to “management”); moreover, further far-reaching evolution is predicted of the organizational structures examined. One should be more inclined to adopt the view that the transformation of organizations will be of a comprehensive nature. On the one hand, further improvement of promotional activities conducted will be required (among others through the use of available and still developing technologies) and, on the other hand, wide-scale undertakings in the area of the management and development of the destination. Generally speaking, activities realized by DMOs (including also NTOs) can be divided into two fundamental groups, i.e. marketing strategy and support strategy. The observations made by the author demonstrate that in the coming future, national tourism organizations will be realizing objectives in the area of both strategies. Marketing activities (including promotion among others) will still be of an essential significance in the operations of the organizations. However, there will be more emphasis on undertakings within the framework of the strategy of support. In general, according to the author, these activities can be classified as:

- tourism development planning,
- development of human resources including education and improvement of the quality of tourist personnel,
- development of technologies and information systems,
- emergency management,
- cooperation with environment and appropriate relations with stakeholders,
- dissemination of sustainable development ideas.

It is to be expected that the coming future will indicate the realization of appropriate objectives that follow from both strategies accepted related to the operations of organizations.

7. CONCLUSIONS

The considerations included in the article point to the significance of national tourism organizations in the realization of the national tourist policies of individual states. The scope of their activities is relatively wide. In accordance with assumptions, these entities are to be seen as national destination management organizations. The historical outline presented points to the differentiation between the individual regions of Europe. Generally speaking, those organizations that occur in the majority of West European countries can boast of a definitely longer history. The characterization of the present status demonstrates that these entities possess quite a wide spectrum of activities. Their responsibilities are still dominated by activities in the area of tourist marketing including mainly the promotion and development of tourist products still dominate in their scope of responsibilities. It is found, however, that at present and in the coming future, these entities will be more and more frequently focusing on the realization of other activities connected with the development of a given destination. These activities can be generally referred to as the so-called strategy of support. Thereby, comprehensive destination management is being introduced.

The analysis of the available scholarly literature and the results of the author's own research served to confirm the hypothesis accepted. Thereby, it was demonstrated that NTO are characterized by significant transformations. These conclusions can be made both on the grounds of the analysis of changes in the objectives and based on the financial expenditures incurred. The author demonstrated that in accordance with the opinions held by scholars, there is a successive increase of the scope of NTO objectives and responsibilities. On the other hand, an increase is being observed of expenditures related to NTO activities (especially with the organizations from Middle and East Europe). It is to be accepted that an extension of the scope of activities is possible to a significant degree owing to an increase of expenditures. It can also be assumed that this process will be occurring in the coming years. The so-called comprehensive destination management will require a greater care of an appropriate development of destinations on the part of the organizations examined. The deliberations included in the article may constitute the point of departure for an assessment of the conformity of estimates concerning the forms of NTOs in the coming future. Thereby, an observation of the activities of the European NTOs will allow a verification of the accuracy of the assumptions accepted in the nearest future.

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