

Douro Valley

NORTH PORTUGAL

Executive Report of the
System for Measuring
Excellence in Destinations

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Douro Valley

NORTH PORTUGAL

System for Measuring
Excellence in Destinations

EXECUTIVE REPORT

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Message from the President of CED

The World Centre of Excellence for Destinations (CED) is proud and excited that the “Douro Valley, North Portugal” is the first destination to receive a SMED (System for Measuring Excellence in Destinations) evaluation.

As a non-profit organization recognized by the World Tourism Organization (UNWTO), the mission of The World Centre of Excellence for Destinations (CED) is *to contribute to bringing tourist destinations, such as the Douro Valley, towards excellence*. This purpose is being achieved by:

- > Giving priority to the design and the implementation of a System for Measuring Excellence in Destinations (SMED) – an innovative system developed by a task force of experts in tourism and related areas. As this report reveals, SMED, as it applies to the Douro Valley, emphasizes the achievement of sustainable approaches to tourism, as a long-term goal, while being concerned about improving all stages of visitors’ immediate experiences.
- > Working in partnership with public and private sector organizations and other stakeholders within the Douro Valley, who are active in caring for the region as a whole.
- > Encouraging the Douro Valley to build upon their strengths, and identify key issues to be addressed and rectified, in order to create and sustain competitive advantage.

> Providing added value to the Douro Valley and its tourism stakeholders through a set of tools:

1. **Diagnostic tool:** The SMED provides the most complete and accurate portrait possible of a Douro Valley as a visitor destination at a given point in time;
2. **Progress tool:** The SMED highlights the Douro Valley's strengths and weaknesses, thus allowing stakeholders to identify and take concrete steps to maintain and improve performance;
3. **Management tool:** The SMED recommends monitoring and follow-up actions for improvement to be undertaken in light of the results from the evaluation;
4. **Collaboration tool:** The SMED can be used to unite the Douro Valley stakeholders by mobilizing them around strategic goals and actions aimed at developing sustainable performance, and delighting visitors;
5. **Market positioning tool:** The SMED brings the Douro Valley's unique characteristics and attributes to the fore, allowing the Douro Valley to refine and improve its market positioning and brand definition;
6. **Benchmarking Analysis tool:** The SMED can be used to learn from world destination benchmarks, making collaborative experience and best practices available to all partners in this global-scale project;
7. **Communications tool:** The SMED evaluation recognizes that the strengths and distinguishing attributes of the Douro Valley can be used in communications addressed to target clientele and the media.

Through partnerships, and sharing the knowledge contained in this report, the Douro Valley will be empowered to excel in the highly competitive global travel industry. By working together, the stakeholders within the Douro Valley will succeed in creating a sustainable tourism destination that motivates visitation, and achieves absolute delight and satisfaction for visitors and residents alike.

ANDRÉ VALLERAND

President

World Centre of Excellence for Destinations (CED)



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List of Abbreviations

(Alphabetical Order)

ADETURN	Associação para o Desenvolvimento Turístico da Região do Norte
CCDR-N	Comissão de Coordenação e Desenvolvimento Regional do Norte
CED	Centre of Excellence for Destinations
C-SMEDQ	Customized SMED Questionnaire
DMO	Destination Management Organization
DMS	Douro Mission Structure
DPQ	Destination Profile Questionnaire
IMC	Museums and Conservation Institute
NTA	National Tourism Authorities
NTO	National Tourism Organizations
ROI	Return on Investment
RTO	Regional Tourism Organization
SMED	System for Measuring Excellence in Destinations
UNWTO	United Nations World Tourism Organization

Executive Summary

As a rural, nature and World Heritage destination, the Douro Valley offers an abundance of touristic opportunities. This report, which reveals the outcomes from the System for Measuring Excellence in Destinations (SMED), seeks to determine how the region can achieve distinctive competitive advantage, even superiority, in regard to the critical aspects of their tourism industry.

This SMED evaluation came about because **Douro Valley is now associated with an international network that pursues excellence – The World Center of Excellence for Destinations (CED). In other words, Douro Valley is part of worldwide destinations framework that was excellence as its mission.**

After conscientious analysis, and in the spirit of guiding the Douro Valley toward excellence, the SMED evaluation process identified varying levels of performance. As Exhibit 1 illustrates and summarizes, the Douro Valley:

- > Excels in “security”, “well being/spa”, “food and beverage”, “transport”, “environment and landscape”, “vineyards” and “culture and heritage”;
- > Achieves high performance in “archaeology” and “information and welcome”;
- > Achieves medium performance in, “accommodation” and “supporting services”; but
- > Achieves low performance with respect to “governance”, “marketing and sales” and “sightseeing”.

FIGURE 1

Rating Scheme

EXCELLENCE	more than 70%
HIGH PERFORMANCE	between 60% and 70%
MEDIUM PERFORMANCE	between 50% and 60%
LOW PERFORMANCE	less than 50%

The Douro Valley's SMED Performance by Category

SECURITY
WELL BEING / SPA
FOOD AND BEVERAGE
TRANSPORT
ENVIRONMENT & LANDSCAPE
VINEYARDS
CULTURE AND HERITAGE
ARCHAEOLOGY
INFORMATION AND WELCOME
ACCOMMODATION
SUPPORTING SERVICES
GOVERNANCE
MARKETING & SALES
SIGHTSEEING

On the basis of this SMED evaluation, a series of recommendations have been identified for each performance category. While these recommendations are intended to signify efforts in pursuit of sustainable development and in realization of more profound economic, social and cultural benefits, their achievement depends, to a large extent, on the creation of an effective Destination Management Organization (DMO). This is a high priority initiative that deserves immediate attention.

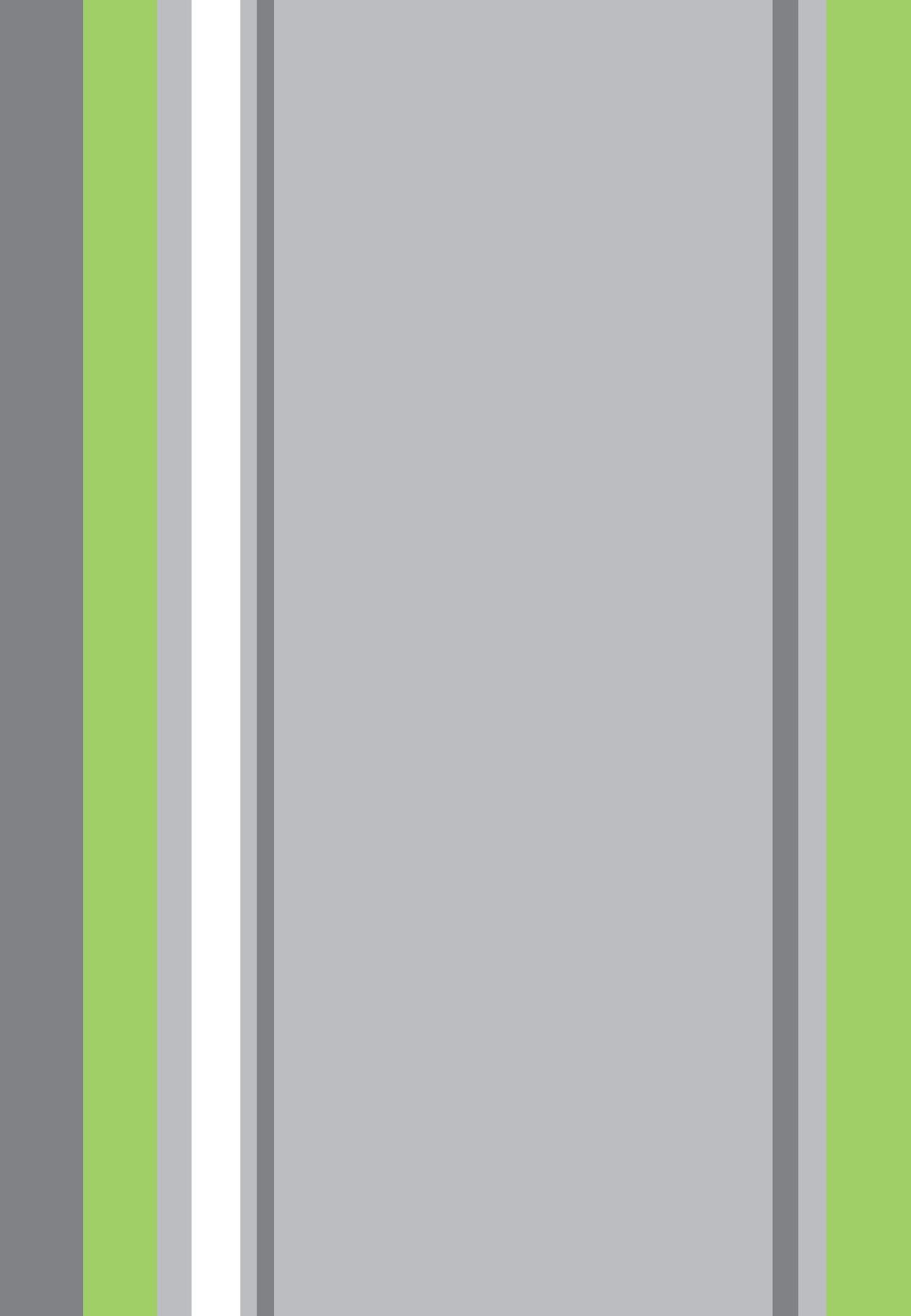
While DMO's are defined elsewhere in this report, they represent a public sphere in which organizations and people deliberately join together around tourism – a compelling issue of mutual importance. By following a set of practices and principles that will make it easier to achieve results, a DMO for the Douro Valley represents a coming together of people who:

- > Share a common vision;
- > Want to build relationships, partnerships, and cross-sector engagement
- > Need a critical mass of dedicated effort to resolve some problems;
- > Are desirous of strong leadership and presence; and
- > Will become architects of change, particularly as related to the sustainable development of tourism.



Establishing a DMO represents the initial step in establishing the organizational infrastructure for the Douro Valley (process currently on going – Pólo Norte). An invigorated DMO will provide the leadership necessary to implement the quest for excellence, and is destined to achieve short-term success (i.e. building the capability for fulfilling visitor expectations), as well as long-term success (i.e. building a viable tourism industry that is environmentally, socially and economically sustainable). The Douro Valley tourism plan will play a key role in the implementation and follow up of the recommendations resulting from the SMED evaluation.

This document presents a summary of the Complete SMED Report, handed to the CCDR-N/Douro Mission Structure where the set of recommendations, analysis and case studies present a more detailed and precise profile that should be used as a working document for the implementation of policy and recommendations in the near future. **Therefore the information contained in this executive report presents only the main results of the SMED process.**





1

Methodology

1. Methodology

As the first destination to receive a SMED evaluation, the Douro Valley agreed to participate in the development phase of the SMED methodology. The general objective of the SMED's development phase is to test the suitability and feasibility of the evaluation process in various tourist destinations, and to improve the relevancy of information gathering activities and the outcomes associated with implementation. As such, many people

helped ensure that the evaluative process took into account the expectations, operating methods, and individual requirements of the Douro Valley.

In this context the opinions and expectations of the Portuguese tourism industry were certainly useful and allowed CED's work team to revise the SMED methodology as a tool to improve the performance of the destinations.

1.1 Step1: Destination Profile Questionnaire (DPQ)

A **Destination Profile Questionnaire (DPQ)** was used to gather general and preliminary information and documentation on the Douro Valley region. The information collected provided SMED experts with preliminary knowledge of the destination which was valuable in preparing, not only for the on-site visit, but the relevant and carefully targeted questions for the customized questionnaire. The Douro Valley Profile questionnaire, sent in April 2008, consisted of 30 questions intended to identify the profile characteristics of the Douro Valley the main statistical indicators, components of the touristic offer, the main activities available, and the contacts and names of the key stakeholders in the destination.

1.2 Step 2: Customized SMED Questionnaire

The SMED evaluation for the Douro Valley is composed of 4 fields and 14 categories that serve as valid and reliable categories for measuring excellence within the destination. SMED experts, in consultation with the Douro Valley representatives, carefully selected the most appropriate categories for the destination profile, and then used responses to the initial DPQ to develop a web-based, **Customized SMED Questionnaire (C-SMEDQ)**. A total of 564 questions were chosen for measuring excellence. The relevant categories used for the Douro Valley were as follows:

Fields	Categories
Destination Sustainability	Environment and Landscape Culture and Heritage
Organization	Governance Marketing and Sales Information and Welcome Security
Activities	Archaeological sites Sightseeing Vineyards Well-Being & Spa
Services	Transport Accommodation Food and Beverage Supporting Services

For each category the participants in the workshops answered a variety of questions related to the relevant SMED categories that each workshop was assigned to evaluate. After the exercise was completed by all participants, the Douro Mission Structure also answered all the questions with precise information that allowed for more complete analysis of all the variables.

1.3 Step 3: The on-site visit

WORKSHOPS

During this phase of SMED, most of the information was collected through a series of workshops and interviews. The key actors associated with the local tourism industry and related sectors shared their opinions about every category as well as providing information to better understand the reality of the Douro Valley from different points of view.

All participants to each workshop were informed about the CED and the System for Measuring Excellence in Destinations. After this introduction, they discussed SMED's processes and benefits.

Participants (the list of everyone who participated is contained in the appendix 1) were then divided into four workshops, each subdivided into two groups, to answer the questionnaires.

1.

Accommodation,
Food and Beverages,
Vineyards and
Support Services

2.

Environment and Landscape,
Urban Planning and Heritage, and
Archaeological sites

3.

Transport,
Governance,
Information and Welcome and
Security

4.

Marketing and Sales,
Well-Being and Spa, and
Sightseeing

In addition, it should be emphasized that knowledgeable individuals on specific topics, such as, accessibility, promotion and marketing, DMO organization, and environment protection, were interviewed in depth by the SMED experts (list available in appendix 2).

The first exercise was a discussion on perceptions of the Douro Valley and identification of the main reasons for visitation – ideas that could be used in the promotion of the Valley. The objective was to determine if stakeholders could agree as to the image and reality of the destination, and whether there is a shared common vision of the characteristics of the place.

Afterwards, participants were asked to answer the questionnaires according to their areas of expertise, and assigned to an appropriate workshop. Each participant was then queried about how they would utilize the results from the SMED evaluation.

Each participant rated the type of tool (diagnostic, progress, management, collaboration, market positioning, comparative analysis, and communications) that SMED represented for them, or might be most useful for the Douro Valley in utilizing the results of the evaluation.

Finally the participants were asked to identify the main obstacles that might be encountered in the implementation of the SMED results in the Douro Valley as a whole.

INTERNATIONAL CONFERENCE

In addition to the SMED activities, an International Conference “Tourism and Regional Development 2007-2013”, was organized by the CCDR-N/Douro Mission Structure, in partnership with Turismo de Portugal, Adeturn and Unicer Turismo, on May 8, 2008 in Porto. During the conference the official signing of the SMED agreement with the Douro Valley in Portugal was announced. As the first destination in the world to participate in this project, it was officially signed by André VALLERAND President of CED, Mr. Carlos LAGE President of (CCDR-N), Mr. Ricardo MAGALHÃES Chief Project of DMS, Mr. Luís PATRÃO President of TURISMO de PORTUGAL and Mr. Jorge OS-ÓRIO President of ADETURN in the presence of the Secretary of State for Tourism of Portugal, Mr. Bernardo TRINDADE, with an audience of more than 350 participants

from the Douro Valley, Portugal, and other European countries. An international press release was sent right after the signature of the agreement.¹

1.4 Step 4: The report

TEAM MEETING

The first activity following the SMED experts' visit to the Douro Valley's was to exchange views. Several debriefing meetings were organized in CED's office in Montreal, and by teleconference for the liaison persons located in Washington D.C. and Madrid. The intent was to identify the impressions, and initial recommendations, of each of the experts, and to plan and allocate responsibility for drafting of the report.

RESULTS' ANALYSIS AND MEASUREMENT OF EXCELLENCE

For each field of excellence (destination sustainability, organization, activities, and services), participants' responses to the questionnaire (C-SMEDQ) were compared to standards in the SMED data base. Since SMED questionnaires are customized for each destination the results obtained per category do not allow rankings or comparisons among destinations. The overall evaluation, therefore, allows SMED experts to recommend only those strategies and best practices to improve the Douro Valley's performance.

The evaluative rating (Excellence, High Performance, Medium Performance, Low Performance) was determined based on the number of participants' answers to questions that denoted "excellence" compared to the total number of answers, as follows:

¹ See Appendix 3, section A.3.2.

EXCELLENCE	more than 70%
HIGH PERFORMANCE	between 60% and 70%
MEDIUM PERFORMANCE	between 50% and 60%
LOW PERFORMANCE	less than 50%

For each question, participants provided observations/comments, taking into consideration the particularities of the Douro Valley and its current stage of development. The opinion of all stakeholders was compared with the information obtained from CCDR-N to determine the level of agreement.

With the information gathered prior to the visit, during the workshops and interviews, and then at the wrap up meetings with the organizing committee, it was possible to draw a complete picture of the destination, and carefully assess the component parts of the tourism industry.

COMPARATIVE CASE STUDIES

In addition to the recommendations proposed by the SMED experts, a synopsis of case studies of comparable destinations is provided at the end of this executive report. The complete case studies appear in the full report. These case studies identify best practices, and are offered as guides to solutions to problems encountered by similar destinations.

FOLLOW UP MEETING IN MONTREAL

The last step of the process involved meetings at CED headquarters with Mr. Nuno Fazenda (CCDR-N). Since this is the first report drafted by the SMED experts, CED felt it was necessary obtain a more detailed information about the case study.



2

A Avaliação do
Vale do Douro

2. The Douro Valley Evaluation

2.1 Background on the Douro Valley

The Portuguese Government, through the National Strategic Tourism Plan (PENT – Plano Estratégico Nacional de Turismo) has identified Douro as a priority tourism destination (Polo Turístico prioritário). Similarly, the Regional Tourism Agenda, through the Tourism Action Plan for the Northern Region has also identified the Douro Valley as a Priority Tourism Destination.

The Douro Valley is a varied and unique destination that offers great value to visitors because it combines distinctive rivers and landscapes, fascinating culture and gastronomy, a wide variety of outdoor activities, museums, ancient and modern architecture and, of course, the well known Douro wines, including the famous Porto wines. The Douro Valley is located in the Northern part of Portugal, and runs between the city of Porto and the frontier with Spain. The area covers an extensive 4,108 km² and is considered mainly a rural-nature-discovery destination according to SMED's classification. This region is home for 214,000 people.² The main cities in the region are Vila Real with 50,423 inhabitants, Lamego with 26,484 and Peso da Régua with 17,492.



² INE, Estimativas Provisórias de População Residente December 2006.

FIGURE 2 North of Portugal and its 4 Regions Area

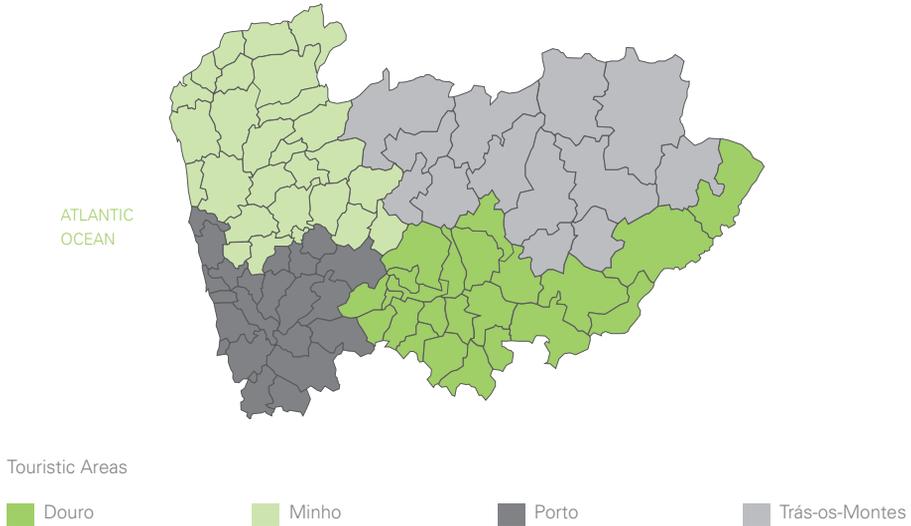
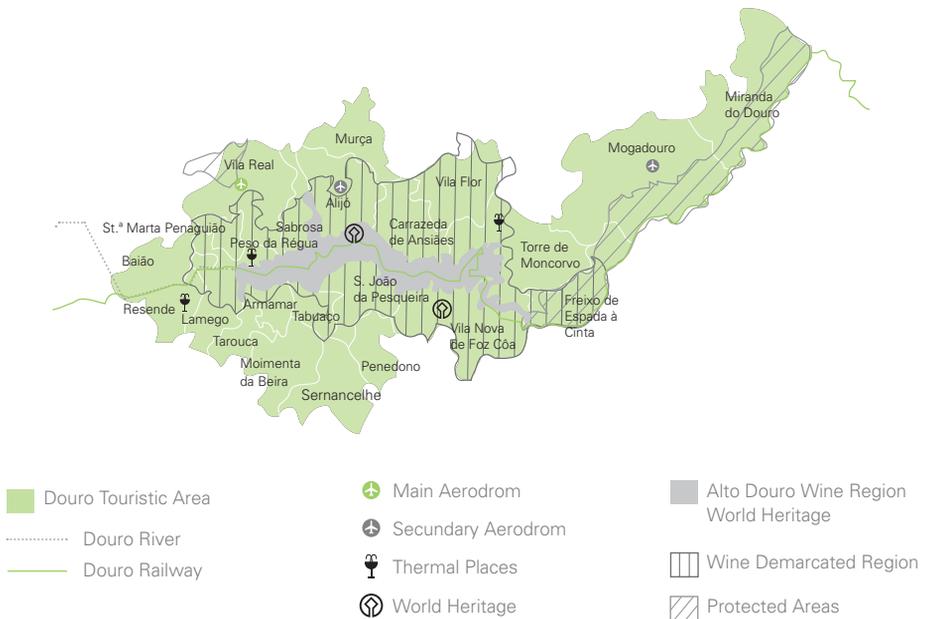


FIGURE 3 The Douro Touristic



The nomination of the region as a World Heritage site created awareness for the Douro Valley in terms of tourism, but this recognition has not been sufficient to enhance tourism activity. In order to promote an integrated and coordinated process for development in the Douro Region, the Portuguese Government has taken a political position on this matter, by creating a `Mission Structure` (Council Ministers Resolution – 31st of August 2006), presided over by the president of the Commission of Co-Ordination and regional Development of the North of Portugal.

According to that Government Resolution, the goals of the Mission Structure are to:

1. Stimulate actions of development in an integrated way
2. Promote cooperation between the central and local administration (utilizing the competencies within the Region), and
3. Encourage the participation of, and initiative within, civil society.

In terms of tourism, the DMS is responsible for the management and implementation of the Douro Valley Tourism Plan.

2.2 The current situation

The main international tourism generating countries for the Douro Valley are: Spain, France, Germany, UK, Italy, Holland, Belgium, Switzerland, United States, Brazil, and Eastern European countries.³ The entry point for the region is the city of Porto, the second largest city in Portugal.

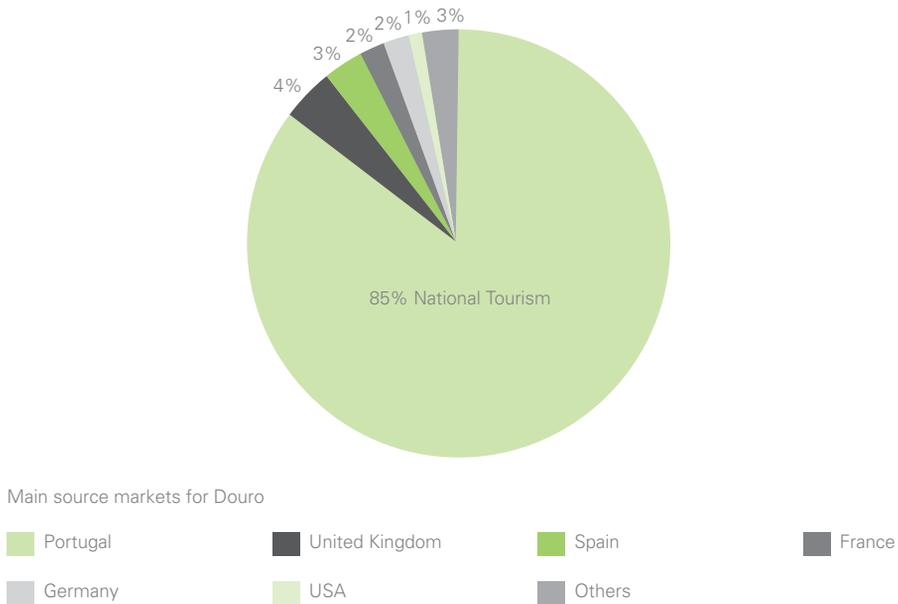
The Francisco Sa Carneiro airport in Porto is considered the most important airport in the Northern Iberian Peninsula, especially in terms of traffic volume and destination connectivity. Presently, the airport serves more than 4 million passengers per year and, with the recent investments undertaken in infrastructure, the total capacity is 6 million passengers per year, with capacity to expand to 12 million passengers per year.

³ Estratégia de Marketing e Promoção Turística da Marca Porto e Norte de Portugal – Jorge Osório, Presidente da ADETURN e Jorge Costa, Presidente do IPDT e Coordenador do Estudo. Presentation during the International conference «Turismo e Desenvolvimento Regional: O Caso do Norte de Portugal». May 8th 2008, Porto, Portugal.

According to available statistics the Douro Valley receives 150.000 tourists per year, with an additional 180,000 visitors booked solely on cruises in the Douro River. There are 36 accomodation establishments, and with other lodging facilities, bed capacity is 2,333. There were an estimated 221,000 overnight stays in 2006, resulting in a 25.9 percent occupancy rate. As such the average length of stay per establishment is 1.5 nights.⁴ (Note that visitors may be staying longer in the Douro Valley if they are residing in different hotels during their visit.)

Proximity to Porto is a great advantage for the Douro Valley, but it is also a factor of competition. Douro faces a challenge of encouraging visitors to Porto to visit and spend more nights in the Valley, and to encourage more international visitors to make the Valley their primary destination. Today many visitors to Porto only take a day trip to the westernmost section of the Douro Valley; therefore, the economic impact is minimized.

FIGURE 4 The main sources of tourists for Douro are



Source: CED with information from CCDR-N or INE, Anuario Estadístico, 2006

⁴ INE, Anuário Estatístico Regional, 2006.

Accommodations in the Douro Valley provide a unique experience that combines rural and cultural activities in the ambience of old manor houses, called Quintas, surrounded by vineyards, offering excellent local cuisine and obviously wine tasting and interpretation activities. The food and beverage sector is very extensive; there are 396 restaurants, 1,156 bars, and many coffee and tea shops. Current statistics reveal that restaurants employed a total of 2,723 people in 2005.⁵

In terms of promotion, marketing and governance, the Douro Valley is going through a very important process of reorganization. Three local tourism office entities are being amalgamated to form a single regional DMO by 2009. Recommendations of this SMED evaluation will be used to formulate the new DMO. Furthermore, a relationship between CED and the Douro Mission Structure will strengthen its involvement in the SMED international community.

2.3 Goals to achieve

A. According to some tourism strategy documents (developed by ADETURN, which is a Regional Tourism Agency for the promotion of North Portugal, and not specifically Douro) , the goals for the Douro Valley are as follows:

- > Increase the income generated by tourism by 2 percentage points, (per year)
- > Increase the average revenue expenditures per tourist,
- > Decrease the effects of seasonality,
- > Maximize synergies,
- > Articulate actions for promotion, positioning, and offer improvements,
- > Create new partnerships and improve liaisons with existing ones,
- > Determine priorities of development in the Douro Valley and take action,
- > Increase Douro's brand visibility worldwide.⁶

⁵ INE, Anuário Estatístico Regional, 2005.

⁶ Estratégia de Marketing e Promoção Turística da Marca Porto e Norte de Portugal – Jorge Osório, Presidente da ADETURN e Jorge Costa, Presidente do IPDT e Coordenador do Estudo. Presentation during the International conference «Turismo e Desenvolvimento Regional:O Caso do Norte de Portugal». May 8th, Porto, Portugal.

B. Vision of tourism development for the entire northern region (including the Douro Valley) identified in the Regional Tourism Agenda – Tourism Action Plan for the North of Portugal

> Position northern Portugal as one of the best tourist regions of the country through a process of sustainable development based on qualification, excellence, innovation, competitiveness of the tourism offer, and the positioning of tourism as a key for development and diversification.

C. Strategic goals for the entire northern region (including the Douro Valley) identified in the Regional Tourism Agenda – Tourism Action Plan for the North of Portugal are: Qualify and evaluate tourism resources to strengthen the priority of tourism products and improve infrastructure support,

> Increase the supply of accommodation, and enhance animation, with due consideration of quality and durability,

> Promote the qualifications of tourism industry employees through better human resources training,

> Promote tourism in northern Portugal and its 4 sub regions (Douro, Porto and Trás-os-Montes and Minho), as well as their primary tourism products,

> Provide assistance and information on regional tourism.

D. Targets for the entire northern region (including the Douro Valley)

> 7.2 million visitor nights by 2015, with foreign visitors accounting for 3.88 million visitor nights (in 2007 the total number of overnight stays recorded in northern Portugal was around 4.6 million),

> Create a 7% average annual growth in visitor nights between 2006 and 2015,

> Generate 507 million Euros in revenue from hotels for the year 2015 (205 million Euros were generated in 2007).

Within the Regional Tourism Agenda, Douro has developed a strategic instrument to develop tourism in Douro – **The Douro Valley Tourism Plan 2007-2013**.

The following exhibit illustrates the strategic framework of the Douro Valley Tourism Plan.

GLOBAL OBJECTIV

Make Douro Valley a tourism destination of excellence, trough a dynamic public and private sustainable tourism process

STRATEGIC PRIORITIES

V	V	V	V	V
Create and improve the infrastructure conditions, public networks and systems to support the tourism industry in Douro	Promote the private investment in tourism and hospitality, in order to develop and qualify the tourism supply	Provide tourism education and training, in order to create and upgrade skills in Douro Valley tourism industry;	Affirm and project Douro Valley as a Tourism Destination of excellence, with a selective marketing and promotion strategy	Reinforce the institutional capacity and promote co-operation

In the context, and provision, of the European Union Funds (2007-2013), this Plan is intended to result in projects to develop tourism in the Douro Region.

Considering the characteristics of the Douro Valley that make it a key destination in Northern Portugal, the CCDR-N and the DMS decided to conduct a SMED evaluation with the CED. The intent is to provide an important contribution to the implementation of the Douro Valley Tourism Plan – particularly through their advice and recommendations.

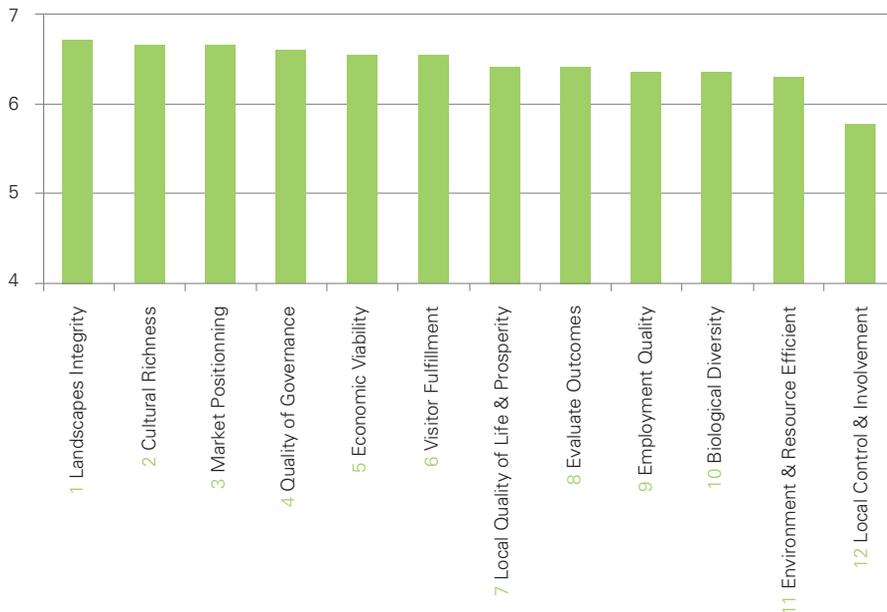
Besides other benefits for the destination, such as integration into an international network that pursues Excellence for Destinations, CCDR-N/DMS anticipates that the SMED will improve the ability to implement the Douro Valley Tourism Plan by supporting projects that are congruent with the recommendations of CED.

2.4 Workshops' results

Following a presentation about the CED and the System for Measuring Excellence in Destinations (SMED), participants evaluated each of SMED's principles. The results are shown in Figure 5.

FIGURE 5 Importance given to the SMED guiding principles by the Douro stakeholders

Guiding Principles

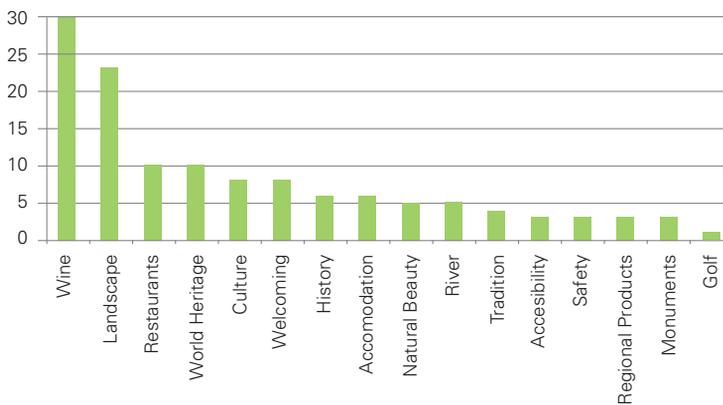


Out of a maximum score of seven (7) where 1 means “low importance” and 7 means “high importance”, almost all of the SMED principles were rated as extremely important, obtaining scores between 6 and 7. The only principle that wasn’t above 6 was “local control and involvement”. This is not a problem as almost all of the tourism businesses are locally owned and, for the time being, there is no indication of a massive investment by foreign companies

The three main principles rated as extremely important by the Douro Stakeholders are “landscape integrity”, “cultural richness” and “marketing positioning”. In the Douro Valley the landscape is certainly the main attraction and the reason for the UNESCO World Heritage nomination. Moreover, the landscape is directly responsible for the Douro Valley’s competitive advantage in wine production. The region’s “cultural richness” is the pride of all stakeholders. These integral elements are essential in positioning the Douro Valley if the region is to achieve competitive advantage.

In identifying the main activity, or activities, that should determine the positioning of the region, and in answer to the question “Why do people want to visit the Douro Valley?” the top four responses, as shown in Figure 6, reveal the following:

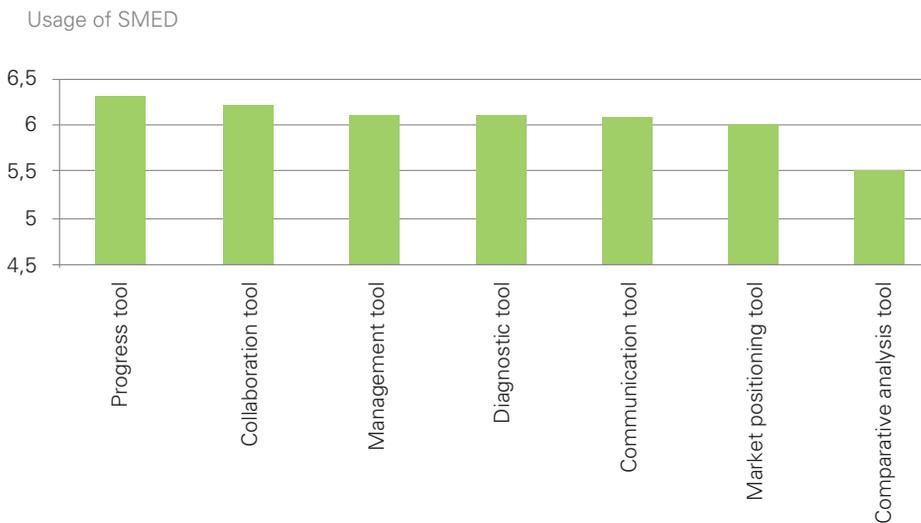
FIGURE 6 Main reasons to visit the Douro Valley, according to the stakeholders



1. The importance of **Wine**, its tasting and sale;
2. **Landscape**, as a unique characteristic of the destination that is a mixture of natural and human work that shaped this unique region;
3. **Restaurants**, as an extension of wine and “terroir” products and closely linked to culture in general, are seen as one of the main attractions of the region, known for its fine and original cuisine; and
4. The **World Heritage** status which was bestowed by UNESCO in 2001;

Following this exercise all stakeholders were queried about usefulness of the results and outcomes of the SMED process, as well as the obstacles that might be encountered in the application of them.

FIGURE 7 Importance attached to the SMED usage by the Douro stakeholders



With a maximum value of seven (7), it appears that all potential uses were considered essential for SMED users in the Douro Valley. As shown in chart 2.6, the main value for SMED is as a “Tool for Progress”. The least important usage was Comparative Analysis.

The main obstacles that were anticipated in the application of SMED are presented in Figure 8.

FIGURE 8 Weight assigned to possible SMED obstacles by the Douro Stakeholders



The main concern is “lack of collaboration” inside the industry, as well as “lack of interest”, followed by “lack of information” available on the sector. These answers alerted the SMED team to prepare appropriate recommendations for the Douro Valley in terms of information collection tools, collaboration programs between the private and the public sectors, as well as motivational and human resources investment programs to bring together the main actors of tourism.

2.5 The Douro Valley's Field analysis

The following aggregation of the categories that were evaluated provides an idea as to the four fields that the SMED tool evaluates in a destination. It is important to remember that the evaluation took into account a series of data obtained through four main sources, namely, the questionnaires answered by the stakeholders, the interviews with key stakeholders, the information obtained from the CCDR-N, and the experience of the experts during their visit.

Rating Scheme

EXCELLENCE	more than 70%
HIGH PERFORMANCE	between 60% and 70%
MEDIUM PERFORMANCE	between 50% and 60%
LOW PERFORMANCE	less than 50%

DESTINATION SUSTENTABILITY	ENVIRONMENT AND LANDSCAPE
	CULTURE AND HERITAGE
ORGANIZATION	GOVERNANCE
	MARKETING AND SALES
	INFORMATION AND WELCOME
	SECURITY
ACTIVITIES	ARCHAEOLOGY
	SIGHTSEEING
	VINEYARDS
	WELL BEING AND SPA
SERVICES	TRANSPORT
	ACCOMODATION
	FOOD AND BEVERAGE
	SUPPORTING SERVICES

2.6 The Douro Valley's Category analysis

The Douro Valley is a destination well-endowed with attractive attributes, and surrounded by important and nearby tourism markets. The quality of the wine, vineyards and wineries which represents the primary element of attraction in the destination is outstanding. The destination, in general, has been declared a World Heritage site by UNESCO as well as its main archaeological site, the Foz Côa prehistoric carvings. The natural, historical and gastronomic heritage is unique, and, along with the inhabitants of the region, constitutes the basis of its charm – characteristics that, if strengthened and sustained, will lead to excellence.

It should be emphasized that the analysis of the categories did not seek to evaluate the beauty, quality of the services, aesthetics or other intangible criteria. The results are focused on the *procedures and practices* that the various stakeholders, including the Douro Structure Mission, apply while operating as tourism organizations or enterprises.

When evaluating participants' answers to questions for each category, the SMED experts (based on their knowledge, experience, and the data in the SMED system) rated Answers positive or not. When fewer than 50% of the answers in a category were positive, the category was considered as having a low level of performance; when answers fell between 50 to 60% positive, performance was considered at a medium level; when responses were in the range of 60 to 70% high or more, then performance was rated as high; and, if 70 % or more of the answers were positive, then performance was considered as excellent.

Rating Scheme

EXCELLENCE	more than 70%
HIGH PERFORMANCE	between 60% and 70%
MEDIUM PERFORMANCE	between 50% and 60%
LOW PERFORMANCE	less than 50%

The Douro Valley's SMED performance

SECURITY
WELL BEING AND SPA
FOOD AND BEVERAGE
TRANSPORT
ENVIRONMENT & LANDSCAPE
VINEYARDS
CULTURE AND HERITAGE
ARCHAEOLOGY
INFORMATION AND WELCOME
ACCOMMODATION
SUPPORTING SERVICES
GOVERNANCE
MARKETING & SALES
SIGHTSEEING



A total of fourteen categories were evaluated by the participants in the SMED workshops. As is shown in the accompanying chart:

- > Seven categories obtained **excellence** – Security, Well Being and Spa, Food and Beverage, Transport, Environment and Landscape, Vineyards and Culture and Heritage;
- > 2 categories achieved high performance – Archaeology and Information and Welcome;
- > 2 Categories achieved a medium level of performance – Accommodation and Supporting Services;
- > 3 Categories received a low level of performance – Governance, Marketing and Sales and Sightseein.

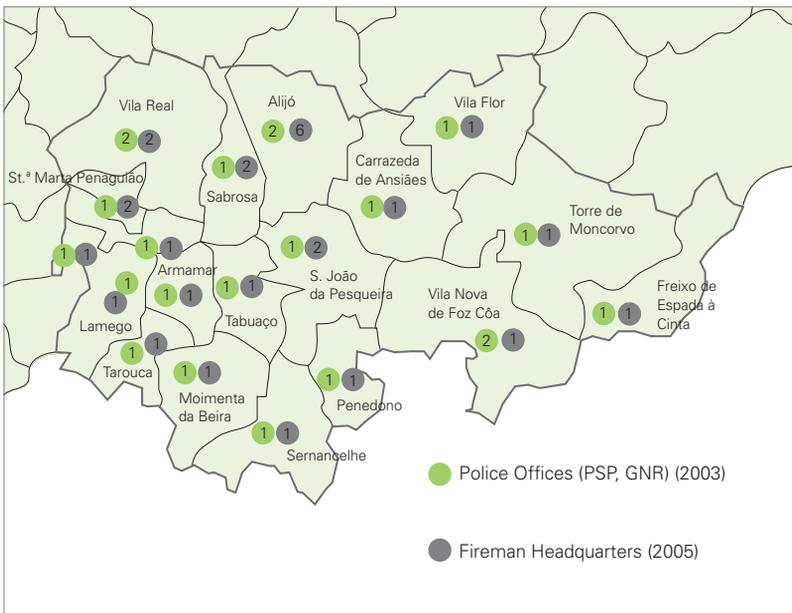
This rating does not mean that Douro Valley, in general, is or is not an excellent destination. The purpose of SMED, in assessing destinations worldwide, is to identify areas of improvement and to identify a path towards excellence. Closing the gaps will be achieved by identifying the best examples of practices around the world, and by utilizing innovative management, marketing and operating techniques as outlined in the recommendations.

2.6.1 Security

DESCRIPTION

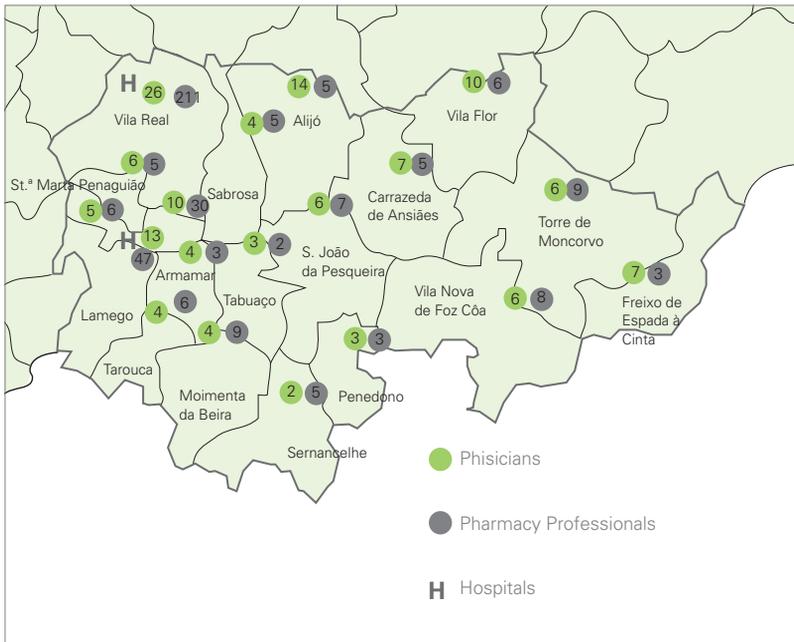
Security establishments in Douro

The Douro Valley, like many rural destinations in Europe enjoys a very peaceful and secure environment in which visitors can travel, communicate and visit in complete safety. All the municipalities that compose the Douro Valley have adequate police stations and fire halls as shown in the following image.



Health and Medical Facilities in Douro

From a health perspective the area possess good coverage in terms of hospitals, clinics, doctors and pharmacists. Two main hospitals based in Vila Real and Lamego serve the local and tourist population. There are also 20 Public Medical/Health Centers.



The number of doctors in Douro is 375 and the number of pharmacy professionals is 146. Other emergency services are available, such as emergency medical assistance and civil protection (INE, 2006).

The criminality rate against people in 2005 was the lowest in Portugal, and one of the lowest in Europe. The destination is totally safe. There is no need for special tourism police or other security measures, since the crime rate is very low; nevertheless, it is recommended that the local police take English courses.

There are good procedures in case visitors are victimized by service companies. The national consumer protection legislation includes all people from any country buying a

product or service in Portugal. Nevertheless it would be useful to create a local tourism orientation service in case of any misunderstanding with travel agencies, hotels or receptive companies.

There is no need for visitors to be vaccinated when entering the country, and there are no health or medical concerns that might worry or be of concern to visitors. The water quality is good; piped water is good for drinking; thermal water and swimming water have both strict regulations and constant inspections in order to guarantee the quality of the resource. In terms of food the ASAE (Autoridade de Segurança Alimentar e Económica) is the national entity for food quality control on restaurants, market and factories.

Presently, Douro Mission Structure (in partnership with the different organizations involved with emergency issues, for example, the National Authority for Civil Protection) is developing an emergency plan in order to react in a fast and efficient way when crisis, accidents or aggressions might occur in Douro region. For the Douro River an emergency plan has been developed.

EVALUATION

Based on the SMED evaluation the Douro Valley is recognized as having **excellence** in the category “Security”.

Suggestions for improvement

- > Advertising on the safety of the destination. The 50 plus market (people aged more than 50, or retired) is one the fastest growing in the tourism industry. All the information concerning safety in general and the possibility of receiving medical attention in particular, is an important factor in appealing to and attracting this market segment. Any advantage that a destination might subtly put forward in its advertising campaigns or information materials in terms of security, medical attention, and other services adapted to this market, will be appealing.

- > Highway help for tourists. The highway is one of the most important means of access to the Douro Valley, so it is important that visitors to the area, especially by car, can have information or service in English and Spanish in the gas stations and service centers.



Planning for emergencies. .With emergency and crisis management plans in the process of being developed, it is important to be re-assured, and to test whether everyone is aware of their pre-determined responsibilities on how to react, how to communicate, how to talk to the press, and who will contact the embassies, police, firemen or other services.

Perceptions of security. Questionnaires designed to determine the perceptions and evaluations of visitors should address the safety issue in order to obtain feedback from visitors.

2.6.2 Well-Being & Spa

DESCRIPTION

The Douro Valley offers 5 thermal water spots (Alijó, Régua, Resende, Baião and Carzazeda) and several SPA Hotels, and up to 19 different treatments are offered and a wide variety of services compliment the offerings.

In Douro and the surrounding areas, various thermal facilities can be found, and some of them are representative of the highest international standard of quality and excellence, for example, the medical thermal SPA Vidago. SPA, thermal and wellness-tourism, in general, are a growing segment of the market attracting high-end tourists around the world. The term “wellness” is widely used in the European tourism industry. Despite the expanding supply of “wellness centers”; there is an insufficiently researched analysis of demand for wellness programs. The quality dimension of wellness services is increasingly becoming the decisive competitive factor. For this reason quality management plays an important role. Market research shows that average three- to five-star hotels provide fairly comprehensive wellness facilities. Wellness hotels, therefore, should specialize in health information, individual care and a wide range of cultural and relaxation programs. Although the same hotel can host cure and wellness guests at the same time, these two segments have to be considered separately when deciding on the marketing strategy. It is assumed, therefore, that wellness is pursued solely by ‘healthy’ people, the prime aim being prevention. ‘Normal cure’ guests aim to heal their illness.⁷

In the Douro Region the SPA and wellness facilities are linked to the cultural and natural heritage of the destination. Most of these buildings offering these services are classic manors or Quintas. In some cases there are wine SPA’s. Treatments with wine exist, for example: Grape wrapping. All thermal buildings have a protection perimeter to assure the quality of the water and preserve all its chemical characteristics. Usually these types of facilities include important natural parks, historical and architectural heritage since some treatments can be complemented with walks, sports, and other outdoor activities.

⁷ Eveline Lanz Kaufmann. *Wellness tourism*. Journal of Vacation Marketing, Vol. 7, No. 1, 5-17 (2001).

Thermal sites normally have low admission fees and are more a traditional holiday activity, while Spa Hotels are associated with an upscale/luxury clientele, and, therefore, their fees are more expensive. The thermal Spa and wellness establishments are organized in a national association that provides visibility and information about all the health-thermal services in the country.⁸

The wellness segment represents a clientele of 810 people per year in the Douro region (the available official data are relative only to Aregos Thermal Springs). Even though this is a very small segment, it consists of high-end clientele, and has great potential of growth.

Every year, the General Direction of Health, establishes a national program for control of the quality of water in thermal equipments, (the Legislation on Thermal Spas which covers the quality parameter for thermal water and the water and geological resources). All facilities must follow sanitary inspection by the local sanitary medical authority, and another by the General Direction of Health. Some thermal SPA's have their own labs for auto-control of the quality of water and the safety of equipment.

The Thermal facilities and SPA's Doctors are specialized in medical hydrology, and the technical staff receives educational training in thermal treatments and other services related to wellness.

The buildings and other facilities used for these activities are completely integrated to the cultural and natural landscape. The mineral water and geological resources are protected by the Portuguese legislation.

The sector, even though it is not a major activity, makes a contribution in terms of employment, and leverages other related activities such as hotels, restaurants and commerce.

There are three schools for training employees in the spa and wellness and educational training in thermal treatments, located in Porto, Chaves and Penafiel, North Portugal. Even if these schools are not located in the Douro Valley, they can contribute to the professionalization of Douro's well-being industry.

⁸ <http://www.termasdeportugal.pt/>

The labour employed in the Thermal and Spa segment is mainly women, which helps to bring equilibrium in terms of equality in employment for the tourism sector in general. The exact number of people employed is not available. It would be important information to measure the growth in employment in the sector.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **excellence** in the category “Well-Being and Spa”.

Suggestions for improvement

- > Data collection. The sector is well organized and the associations have a good set of data available. The only recommendation would be the application of a series of surveys to learn about the perception of the tourists using their services.
- > Positioning Douro as a high-end destination. The competitive markets are pushing destinations to specialize in different activities. With the main goal of attracting tourism and increasing the economic benefits for the local population, the Douro Valley can start a marketing strategy of high-end positioning where the extraordinary wine, Porto wine, quality accommodation, and SPA and wellness segments can play a dominant and supportive role.
- > Qualifying the existing thermal spas. To increase the demand for wellness activities in Douro Valley its necessary to qualify the existing thermal SPA's – Termas de Aregos and Caldas de Moledo – by inducing/promoting investments in modern equipment; in adapting buildings; informing, educating, and involving people as to the needs of a new type of clientele; professionalizing workers; providing more innovative products and services; benchmarking good practices; and sharing innovative concepts with the surrounding regions (for example with medical thermal SPA of Vidago)
- > Enlarging the offer of thermal SPA's in Douro Valley by reactivating Termas de Baião and Caldas de São Lourenço

- > Establishing 'gold level' standard operating practices for all wellness facilities (whether in hotels, wellness centers or thermal spas) in order to exceed expectations of visitors and clients

- > Developing a network of wellness stakeholders in Douro Valley. Cooperation is required to make Douro a wellbeing place where all activities are developed with the mission of ensuring that visitors have a pleasant and relaxing stay that they wish to repeat.

- > Including and matching the Douro Valley strategy for developing wellness tourism with a similar strategy for the North of Portugal. Douro Valley development must be seen as an important contribution to establish North Portugal as the premier national wellness destination. Inclusion of the Douro Valley in the marketing strategy of North Portugal for health and wellness tourism would be a definite advantage.



2.6.3 Food and Beverage

DESCRIPTION

Douro Valley has 396 restaurants and 1,156 bars, coffee houses, beer and tea shops. Prices vary from very expensive, five star restaurants, to very affordable family or traditional restaurants. This sector of the economy employed a total of 2,723 people in 2005; and, it plays a key role in the whole Douro experience, since the destination is rural and has a strong gastronomic and wine component.⁹ Menus of restaurants and bars tend to favour regional food and wine. Restaurants are available in all towns and rural areas.

The general quality of the food was rated by all stakeholders very highly, 4.5 out of 5. Most of the restaurants accept all kinds of payments, and offer menus in other languages, mainly English – sometimes Spanish or French menus are available. Many hotels have information on some restaurants in the nearby areas, promoting them amongst their clients. Restaurants on the other hand also offer information about the attractions in the area, and promote local products and cuisine. Most of the restaurants are locally owned and employ mainly local work force.

Clients experiencing any problem in a restaurant can use the national system of complaints, whereby customers can identify their concerns in the book of complaints – it is mandatory to have one book available at restaurants, bars or hotels. Complaints are analyzed by the National Tourism Authority, and actions are taken.

Restaurants in general are accessible for physically challenged people, but the rating indicated by the stakeholders was low (2,5 out of 5).

All restaurants are inspected periodically by the health authority and the Portuguese Association of Restaurants and Similar Businesses. It appears as if the national control is enough and the region has no need to do extra visits to guarantee the hygiene.

⁹ INE, Anuário Estatístico Regional, 2005.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **excellence** in the category “Food and Beverage”.

Suggestions for improvement

- > Improving the performance and quality of the restaurant sector in Douro Valley is vital in order to professionalize operations. Owners and managers in general often require assistance in improving various processes of management, including accounting, finance, marketing, training and the provision of quality services.
- > Douro restaurant guide. There is neither an exhaustive restaurant guide nor a website that presents a complete list of restaurants in the Douro Valley. It is recommended, for the use of locals and tourists, to create a website identifying the restaurant and dining options available in the destination. This information allows visitors to choose amongst the great variety of restaurants according to their needs and budgets.¹⁰
- > Information about the restaurant sector. As in several other categories there is a lack of information in general from the client point of view. The needs and expectations of clients are measured by some restaurants on an individual basis, but no general information is gathered on a systematic way.

¹⁰ The example of the Montreal restaurants is interesting www.restomontreal.ca

2.6.4 Transport

DESCRIPTION

The Douro Valley is composed of a wide region including several municipalities, towns, vineyards, castles and archaeological sites. This large area of 4108 km² is well served by various means of transport, and excellent infrastructure. The Douro Valley is accessible by car, train, bus, taxi, airplane and boat. Three highways connect the Valley: IP2 – single carriageway; IP3/A24 – dual carriageway; IP4/A4 – single and dual carriageway.

The closest international airport is the Francisco Sá Carneiro Airport in Porto, one of the most modern airports in the world. The airport has been awarded 3rd place in the category of Best European Airports by the Airport Service Quality Awards, which is promoted by ACI – Airport Council International. The airport is has also been distinguished with a 3rd place in the category of Best Airport with less than 5 million passengers. With more than 4 million passengers per year, the airport has undergone a complete renewal with a recent and important investment to extend its capacity up to 6 million passengers per year.

Fourteen airline companies provide service into the Porto International Airport. International flights are currently arriving from important European cities, such as Paris, London, Madrid, Barcelona, Geneva, Zurich, Brussels, Amsterdam, Rome, Milan, Frankfurt, Stuttgart, and Cologne. These flights are operated by recognized airline companies such as Air France, Iberia, Lufthansa, TAP, Swiss Air, and low cost companies such as, Air Berlin, Aigle Azur, Air One, Brussels airlines, ClickAir, Easyjet, LuxAir, RyanAir, Sata, SpanAir, Transavia, Tuifly, Volareweb.

The driving time between the Porto Airport and the first main city, Vila Real, in Douro is approximately 1 hour by car. Within the Douro Valley region the distance between Peso da Régua and Miranda do Douro, the easternmost area of the destination, is 190 km which represents about 3 hours driving through the N317/N37 and N218 main roads. Distance and driving time within the Region, in some cases, are obstacles as some visitors express reluctance to circulate in the area.

Given that the Douro Valley is mainly a rural, nature destination, transport plays a crucial role. Within the destination tourists can move by bus, boat, train, taxi and bicycle; and there are also two Aerodromes for small flights.

International tourists have different transport options when visiting the Douro Valley, they can:

- > Drive their own car or rent one,
- > Take a tour with a tour operator where a bus brings them to Douro,
- > Take a cruise ship, which normally offers meals and lodging,
- > Take the scenic train offering great views of the Valley and a traditional experience,
- > Take a public bus to a specific town and move by bus from town to town.

When driving, traffic volume is very slight. Almost all wineries, vineyards and other attractions are easily accessible by car; driving is easy, and parking is often available. Signs and directions are, however, not always available or clear. Gas stations are in abundance throughout the region, and are easy to find.

Within the Douro Valley there are 29 regional stations on the Douro Railway from Marco de Canaveses to Pocinho. There is a main railway line called the Douro line, and an Interregional Line going through Porto/Régua/Pocinho with 21 stations. The journey time is approximately 3 hours and the ticket price is €10,75. The first Regional Line from Régua to Vila Real offers 8 stations with a duration time of close to an hour. The second Regional Line goes from Tua to Mirandela with 15 stations, a duration of an hour and three-quarters. The train is a non-expensive and practical way to visit the region, though information is not readily available.

Train travel is also an ecological way to move around, and the authorities should consider the implementation of an ecological train program to benefit the locals and the tourists. The train authority, Comboios de Portugal, has suggested that the regional train should be an important part of the touristic offer of Portugal, but this has not yet totally been implemented.¹¹

In Douro region there are tourist and historic steam trains. They are operated by a public operator (Comboios de Portugal) and in some cases by different private operators, which offer tourism packages (articulating tourism boat cruises with tourist or historic steam trains).

¹¹ www.cp.pt

The “Tua Valley” line hugs the side of the rocky ravine and climbs for over an hour and a half. The Douro Railway Line was completed in 1887, after twelve years, twenty-six tunnels and thirty bridges. The service has been offered in carriages from the beginning of the 20th century, and the train has been hauled by either steam (Henschel loco 0187) or diesel (series 1 400).¹² These traditional trains are polluters, but there are options to filter or reduce emissions from the locomotives.

By boat there are 20 companies and 6 Boat-Hotels offering touristic services, for a total of 52 touristic cruises. Many passengers visit only a part of the Douro River, while some others combine the boat with train or bus. The boats leave from Vila Nova de Gaia and Porto. Prices vary according to the company and the kind of package offered.

Taxis are not expensive and they are well regulated by local authorities. There is a taximeter fare transparency programme, and a legal price per km. Taxi cars and drivers should be certified by the regional transport system.

Bus stations are available in almost all the towns and villages. Bus fares are not expensive and the service schedules are respected. The train and the bus are good options when visiting the area. The national Net Express buses company works in the region as well as several private companies. Almost all of the transport companies are Portuguese, and they employ mainly Portuguese labour.

There is a plan to improve air quality of buses, on a national level. The Framework Directive on air quality defined a new regime for air management in European Union, and the CCDR-N is presently developing an Air Quality Action Plan for the Northern Region, while studies performed in the region indicate that the domestic, commercial and industrial components of the pollution in the region are more important than the vehicle ones,¹³ air quality is constantly assessed by authorities.¹⁴

¹² http://www.greatwinecapitals.com/porto/por_steam_train.htm

¹³ Sousa, Sofia Gomes de. “Plano de melhoria da qualidade do ar da Região Norte” Dissertação de mestrado, supervisor Borrego, Carlos Alberto Diogo Soares. Universidad de Aveiro. 2007. P. 91.

¹⁴ <http://www.ccr-norte.pt/ambiente/qualiar.php>

EVALUATION

Based on the SMED evaluation, the Douro Valley receives **excellence** in the category “Transport”.

Suggestions for improvement

- > **Porto airport client maximization.** While the Porto Airport receives more than 4 million passengers per year, the official number of visitors to the Douro Valley is unknown. Regardless, there is opportunity for growth by promoting, more thoroughly, the Douro sites amongst the users of the Porto airport which is the main international entrance for the Douro Valley. Campaigns like “When you come to Porto, don’t forget to visit Douro”, better distribution of information and advertising, and more extensive negotiation with operators and airlines could increase the visibility of Douro amongst Porto’s visitors. The same measures can be taken in the train stations in Porto and in the cruise areas of Vila Nova de Gaia and Porto. In a complementary way, more packaging with tour operators can be developed to bring people to the Douro Valley and out of Porto for at least 2 days. Promotion of fly-and-drive packages can be increased because of easy driving and accessibility.
- > **Data collection.** The airport of Porto has excellent information about the clients, services and partners, but there is no information available for the other forms of transport - train, boat or bus. The DMO can promote studies in all transport services to obtain a better idea of the needs of their clientele and to better utilize the amount of air travel information.
- > **Road signage.** While Portugal and the region do have specific signs for tourism. The main problem is that either there are no signs, an inadequate number of signs, or, in some cases, an excess of signs (with different types of information all together).

This inconsistency suggests that priority be given to the development of a tourism signage master plan. With the assistance of different stakeholders with responsibilities in this field (Estradas de Portugal, Municipalities) and from the tourism sector – hotels, rural tourism, etc) a diagnosis of needs and identification of an appropriate signage system could be undertaken.

A second phase of identification of the Alto Douro Wine Region – as a World Heritage Site – should be developed in order to inform visitors that they are in a UNESCO site. The first phase resulted in the placement of some signs that the Alto Douro Wine Region is designated as World Heritage.

> **Downtown transport changes.** Inside the cities of the Douro Valley, the old town districts can improve the pedestrian areas, provide bicycle lanes and alternative transports like electric or hybrid minibuses. Several European cities are turning towards new transport systems and giving greater priority to bicycles and pedestrians.¹⁵ There was no information available about the number of pedestrian streets or the extent of bicycle lanes.

¹⁵ For example the Italian electric buses are rapidly getting approval in Europe and North-America.
<http://www.tecnobus.it/home/en>

2.6.5 Environment and Landscape

DESCRIPTION

The Douro Valley is a clean destination, and the public services are efficient in terms of trash collection and general cleanliness. Every municipality is responsible for these kinds of services. In general they cover waste management systems collection, sorting, recycling, destruction and storage of waste. According to the answers provided by participants, there are systems for the treatment of solid urban waste and for the treatment of residual waters.

Because natural attractions and landscape represent the main reason for visiting the area, a priority is assigned to the environment. The endorsement by the UNESCO World Heritage encourages the preservation of the area. In fact almost 14% of Douro's land area is a natural protected area. Conservation of the flora and fauna of the region is guaranteed.

The «Douro Limpo» campaign led by the University of Trás-os-Montes and Alto Douro, supported by CCDR-N has promoted the importance of conservation of the environment amongst locals and visitors. The Nature Conservation and Biodiversity Institute is also dedicated to the conservation of natural areas, habitats and wildlife.¹⁶

The North region in general has a number of rules and regulations concerning sustainable development. There are specific regulations for the tourism sector, and financial incentives to create systems for companies within the industry to diminish their environmental impacts.¹⁷ Energy efficient systems have been implemented in the area, but some stakeholders are either not aware of them or do not participate in such initiatives.

As a rural destination, the green areas play a key role in preserving the landscape. In fact, the Environmental Dissonances Project which is intent on recovering and conserving the natural patrimony and eliminating environmental intrusion on the landscape, was specifically developed for the Douro Region. Programs to reduce water, air and soil pollution have also been implemented.

¹⁶ <http://www.dourolimpo.utad.pt> and www.icbn.pt

¹⁷ www.dgotdu.pt and www.ccdr-n.pt

These environmental efforts are reinforced by the Natura 2000 Network Strategy, a European ecological network created to preserve biodiversity by conserving natural habitats, wild flora and fauna, within the European Union territory. Natura 2000 consists of various areas of communal importance for the conservation of habitats and species. Human activities must be compatible with the protection of those natural values. The management of such areas must be ecological, economical and socially sustainable. The Natura 2000 Network is composed of sites classified as Special Protected Areas (SPA), for the conservation of wild birds, including migratory species and their habitats.¹⁸ Other efforts are being pursued by local Universities and the Nature Conservation and Biodiversity Institute.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **excellence** in the category “Environment and Landscape”.

Suggestions for improvement:

- > Conduct perception studies, implement surveys and studies amongst the destination visitors to determine their perception of the environment and landscape, and to evaluate the performance of the destination in this regard.
- > Implement a self sustainable garbage-can system for touristic areas whereby the municipality utilizes garbage cans made preferably by local craftsmen and/or typical materials/design that will contain an area for a discrete advertising or trademark presence.
- > Use environmentally friendly products; create an ecological conscience among tourists through information in hotels; and educate visitors about conservation and sustainability in Douro.
- > Improve the interpretation of the destination through special tours, maps and other tools to help tourists understand the importance of the region’s environment.

¹⁸ www.icbn.pt

- > The Environmental Dissonances Project should be continued and reinforced. Although the Douro landscape is well preserved as a result of a good conservation and management of the territory, there still are some intrusions that should be eliminated. On the other hand, environmental campaigns are also important. In fact, the cultural landscape of Douro is an outstanding and unique site in the World, which must be preserved, as it constitutes the basis for development of the region, and of tourism.

- > Create and promote a local declaration of protection of the environment from a tourism perspective. Documents like the Geotourism Charter¹⁹ or agreements from such organizations as Greenpeace, and the World Wildlife Fund and similar institutions, can help the Douro Valley promote stakeholders' commitment to protecting the natural environment.

- > Sign, and live up to, the principles contained in the Geotourism Charter. This recommendation stems from the Guiding Principles of SMED and is related to deriving all the benefits associated with SMED. The implementation of a Geotourism strategy will enhance the Douro Valley's commitment to responsible and sustainable development of the tourism industry.

¹⁹ See an example in: <http://www.sonorandesertgeotourism.org/>
http://www.nationalgeographic.com/travel/sustainable/programs_for_places.html#mapguides

2.6.6 Vineyards

DESCRIPTION

All stakeholders recognize wine as the principal characteristic of the region and the main attraction. Wine production, beautiful landscapes, and, wine and Porto tasting pull visitors to the Douro Valley. The brand of Porto wine is known worldwide, but few people are aware that it is produced in the Douro Valley.

Oenological tourism in the region is organized into two thematic Routes: “Rota Vinho do Porto” (Porto Wine Route) and “Rota Vinho Cister” (Cister Wine Route). Both routes include several vineyards open to the public. The “Rota do Vinho do Porto” has 40 Quintas open to the public; Rota Vinho Cister has 13. These routes were created with the support of the European Union program Dyonisios, and have become the most visible face of the wine tourism practice in Portugal.²⁰

Some wine Quintas offer accommodation, restaurants, guided visits and shopping; however the level of integration is not the same for all Quintas. The visits are definitively linked to the cultural aspects of the destination and some of them allow free visits to the vineyards.

The grape harvest period is brief; from September the 10th to October 15th visitors can be part of the experience. The wine experience begins in the city of Porto where the visitors normally land, and follows the Douro River which crosses the whole destination.

The Douro Region was the world’s first regulated, demarcated wine region in 1756. The river Valley possesses a high potential to become a unique tourist destination due to its diversity and natural and cultural heritage. All these elements need to be more highlighted in the international market.

²⁰ Simões, Orlando. Enoturismo em Portugal: as Rotas de Vinho. Revista Pasos. Vol. 6. No. 2. Pp. 269-279. 2008.

Many Quintas participate, in one way or another, in the wine routes even though their level of quality or services offered is not the same. Most of the vineyards are accessible by road following the two routes. The services are well adapted to tourists and reception is specially friendly and welcoming. The Quintas and wineries are totally integrated with the landscape and actually constitute part the reason for the world heritage designation. The quality of food and wine is carefully considered; and the Quintas do provide appropriate emergency and sanitation measures.

Wine visits are free; only shops, restaurants or accommodation charge a price to customers. An estimate number of 113,000 visitors annually come to see the vineyards – 70% of the total number of visitors to the Douro Valley.²¹

The Douro Valley wine industry employs 3,790 people, providing some idea as to the importance of this activity when compared to the accommodation industry that employs only 363 employees. So the main attraction in the destination as well the main job creator activity is wine. In the Douro Valley, there are about 10,000 vineyards and more than 600 wineries. While most of the small vineyards are locally owned, many of the large ones belong to people living in Porto or even to foreigners.

The wine industry has adopted and utilizes green policies concerning the products used to produce, bottle and distribute their products. Biodiversity is also protected, and the cultural heritage of the area plays a key role in the development of the region as a wine tourism destination. Manor houses, Quintas and other historic facilities are preserved and refurbished for tourism purposes.

The wine industry is also linked to an important network of education institutions namely:

- > Escola de Hotelaria e Turismo de Lamego;
- > Núcleo Escolar de Mirandela;
- > Escola Profissional do Rodo;
- > Esprodouro – S.J. Pesqueira;
- > UTAD (University of Trás-os-Montes and Alto Douro);
- > IPViseu – Escola Superior de Tecnologia e Gestão de Lamego;

²¹ Data based on the information obtained from the CCDR-N and the IVDP (Douro Port Wine Institute)

The producers are well organized in several associations:

- > ARVP – Associação da Rota do Vinho do Porto;
- > Casa do Douro;
- > IVDP – Instituto dos Vinhos do Douro e Porto;
- > Lavradores de Feitoria;
- > AVEPOD – Assoc. dos Viticultores e Engarrafadores dos Vinhos do Porto e Douro;
- > More than 15 “Cooperativas”;
- > ADVID – Associação para o Desenvolvimento da Viticultura Duriense;
- > A group known as the “Douro Boys”.

The European Agricultural Fund for Rural Development (EAFRD) is the Fund that supports the PRODER - Programa de Desenvolvimento Rural. This is the financial instrument of the second pillar of the Common Agricultural Policy (CAP), Rural Development. The fund provides support for sustainable rural development in the EU via national or regional rural development programs.

The PRODER - Programa de Desenvolvimento Rural – is a strategic and finance instrument to support rural development in Portugal, for the period 2007-2013, co-financed by the European Union. The intent is (i) to raise the competitiveness of the agricultural and forestry sectors, (ii) to promote the sustainability of the rural areas and of the natural resources, and (iii) to revitalize the rural areas economically and socially. This Program will be an important instrument to support projects in the Douro Region in the rural development area.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **excellence** in the category “Vineyards”.

Suggestions for improvement

- > Quality standard of the offer. Even though wine is the main attraction, not all vineyards are ready to receive tourists in a consistent way. The application of a total quality management system is recommended. When hotels, wineries and restaurants acquire and maintain a certain level of quality with reference to service, hygiene, local

ambience and other operating standards, they could benefit from promotional preferences, such as inclusion in certain brochures, web sites and international travel shows, jointly sponsored by the DMO.²²

> Surveys. As previously mentioned, collecting data to better understand and serve customers is crucial if the vineyards want to improve their quality and adapt to the needs of their clientele. Wineries, producers associations and the DMO could collaborate to undertake these studies.

> Interpretative maps. Most of the vineyards are accessible by road, so wineries and Quintas should create appropriate interpretative maps. This kind of tool allows visitors to simplify their trips and visits, but could help improve the knowledge of the visitor and enhance appreciation and understanding the region.²³

> Cooperation between producers and tourism industry. The creation of international awareness about the harvesting experience is crucial in attracting visitors, wine connoisseurs and amateurs and students to this unique activity. Promotion programs can be created in order to promote this and other activities related to wine production. Creating a wine guide hand book, courses for guides, and a financial help system for improving the equipment and facilities, are also required. More detailed information is available in the main report on the comparative analysis of the wine producing destinations.

> Interaction with restaurants and hotels. Every time a customer drinks a bottle of wine in a restaurant or hotel, there should be information available about the wine, the vineyard, the possibility to visit the place, and other pertinent information that might be of interest to the visitor. This cooperation between wine producers and tourism establishments will help to develop a complete experience while visiting the region.

²² <http://www.tesorosmichoacan.com/> See the Morelia case as an example.

²³ See an example in: <http://www.sonorandesertgeotourism.org/>

http://www.nationalgeographic.com/travel/sustainable/programs_for_places.html#mapguides

> Reinforcing the connection and participation in the Vintur European Association. The mission of Vintur is to develop common strategies and tools for the wine culture and tourism in the European wine growing regions and towns through the education, development and consolidation of a working framework and a common strategy. Vintur provides:

- > A working platform;
- > An intense cooperation among the involved actors;
- > The development and the valuation of the good practices in the services and products.



2.6.7 Culture and Heritage

DESCRIPTION

Prehistoric Rock-Art Sites in the Côa Valley

This exceptional concentration of rock carvings from the Upper Palaeolithic rock-art of the Côa Valley (22,000–10,000 B.C.) is the most outstanding example of the sudden flowering of creative genius since the dawn of human cultural development. The Côa Valley rock art throws light on the social, economic, and spiritual life on the life of our early ancestors in an exceptional manner.²⁴

Alto Douro Wine Region

Wine has been produced by traditional landholders in the Alto Douro region for some 2,000 years. Since the 18th century, its main product, port wine, has been world famous for its quality. This long tradition of viticulture has produced a cultural landscape of outstanding beauty that reflects its technological, social and economic evolution.

The components of the Alto Douro landscape are representative of the full range of activities association with winemaking – terraces, quintas (wine-producing farm complexes), villages, chapels, and roads. The cultural landscape of the Alto Douro is an outstanding example of a traditional European wine-producing region, reflecting the evolution of this human activity over time.²⁵

Heritage areas are an obligatory part of a visit to the Douro Valley – all the towns provide several options to meet with the past, and examine traditions and local culture. From this point of view, heritage is part of all visit programs, from single tourists to groups and organized trips. With reference to the two world heritage sites, the Alto Douro wine region is the whole region, around the Douro river; so, it is easily accessible. The Foz Côa site, which is beyond the central area, is not as well integrated into tour operator programs and local promotions. As such visitors coming to the Douro may neglect to visit it.

Other heritage sites (churches, museums, parks, and several medieval, renaissance and even modern buildings) are easily accessible by car, train and boat. Of particular

²⁴ UNESCO, <http://whc.unesco.org/en/list/866>

²⁵ UNESCO, <http://whc.unesco.org/en/list/1046>

merit are the region's Baroque buildings, such as Casa de Mateus in Vial Real – it is one of the most important tourism attractions. Most of these sites are located within a town or near the main touristic areas, which makes it easy for visitors to access them.

Schedules of operation and opening hours are respected which allows visitors to plan their trip. Churches are open almost the whole day which makes it easy to visit. In almost every town tourists can find multilingual guides, fluent in Portuguese, Spanish, English and French. The employees of the museums and similar sites, are well organized, prepared and have a sense of welcoming. The sites opened to the public have emergency plans in case of accidents, though this information is not always distributed amongst stakeholders. Free visits to the museums and heritage sites are possible for children under 14, researchers, professors and students, tourism journalists, and for everyone on Sundays and special holiday's mornings, until 14:00 hrs.

Since the Douro Valley is not yet very popular, there is no congestion or overcrowding. The only site that has to control the number of visitors is the Prehistoric Rock-Art Sites in the Côa Park, but they do have a management system for visitors; that is, they have established a maximum of visitors per day. In order to visit some sites there is need to book in advance, but in general heritage sites are open to the public without specific restrictions.

The infrastructure related to heritage sites, museums, parking lots, ticket stands and other services are well integrated to the original style, tradition and landscape, and most of these areas have green policies and low environmental impact. The sites that are outside urban areas favour biodiversity. The entire infrastructure related to heritage sites is inspected on a regular basis; and there is compliance with local regulations of land use.

Local people have complete access to job positions in the heritage sector, and there are professional courses (promoted by the centers of employment and professional training) that provide training in heritage such as, conservation of patrimony/heritage, cultural and social heritage, traditions, etc. Entrepreneurs are provided with incentives for innovation, especially in the creation of local employment opportunities. Most of the employees are locals.

The heritage of the region is well protected and has a national system of conservation, protection and renovation that guarantees the preservation of the cultural heritage.

EVALUATION

Based on the SMED evaluation the Douro Valley is recognized as having **excellence** in the category “Culture and Heritage”.

Suggestions for improvement

- > Touristic heritage sites and monuments. The new DMO should work closely with the Regional Direction of Culture of the North of Portugal and IGESPAR (Archaeological and Architectonic Patrimony Management Institute) in regard to improving information about these sites and monuments. This interaction will allow the DMO to provide specific information for tour operators, journalists and the public and make it part of offerings or package tours. The natural-human heritage of the Douro Valley, the archaeological heritage of Foz Côa, the medieval heritage of the whole region, and the downtown areas of Douro’s towns should be integrated into more complete cultural-heritage offers.
- > Interpretative information of heritage sites. Most of the existing heritage sites do not have interpretative information available. The DMO should engage both visitors and hosts in learning about these special places. Residents should be encouraged to show off the natural and cultural heritage of their communities, so that tourists gain a richer experience, and residents develop pride in their locales. In situ plaques, interactive maps, web sites, brochures and podcasts can help to inform the visitor about the importance of the local heritage.
- > Ticketing techniques. When possible, pre-booking, double ticketing or discounts procedures should be implemented to access heritage sites. Linked tickets between attractions like a winery and a convent or a museum and an archaeological site allow visitors to have a complete perspective of the heritage sites and monuments, thereby increasing their experience and allowing minor attractions to be linked to main attractions. Actually Portugal, as a country, has similar programs created by the Museums and Conservation Institute (IMC), but the pass is national and doesn’t include any Douro regional attraction.
- > Shops in museums and heritage attractions. Besides the Foz Côa site, the Lamego museum and other few places, there is a lack of shops in the area where visitors can obtain books or souvenirs of the region. The DMO can create spaces near

heritage sites to rent, or allow entrepreneurs to sell souvenirs, handcrafts, and local products to the visitors.

> Visitor statistics. The number of visitors to attractions in the region was not available during the visit, nor in the complementary information sessions. This is crucial information since it allows the DMO to track visitation and expenditure rates, and to improve promotion in this sector by measuring the impact of campaigns, promotions and other actions. It also provides the percentage of visitors to cultural sites compared to the total number of visitors - information needed to understand the relative importance of the cultural sector in comparison to other attractions in the Douro Valley.

> The number of guides in the heritage sites was not available. It is important to know if the needs of guiding are covered since the guided visit gives the tourist a better understanding of the museum or cultural site.

> Information of the total investment in heritage conservation was not available. These figures are valuable in understanding the importance of the sector by adding the costs and investment in conservation efforts to the costs of promotion and marketing it is possible to do a cost/benefit analysis. The planning of future investments as well as the importance of preserving the cultural unquantifiable value of the heritage is of key importance.

> Incentives to develop activities related to heritage. Even if the region can attract European Union Funds from the National Strategic Reference Framework for the EU Structural Funds (2007-2013), the local government, in alliance with the DMO, should create an incentive program to attract entrepreneurs to the cultural tourism sector. With such a rich cultural heritage there are many opportunities to create viable enterprises.

> The Regional Direction of Culture of the North of Portugal (regional delegation of the Archaeological and Architectonic Patrimony Management Institute), could be an important partner of the new Douro Valley DMO especially in the preservation, promotion and good usage of the built heritage of the region. This partnership could bring together other stakeholders so they can be better informed about heritage and actions taken from a touristic perspective.

2.6.8 Archaeology

DESCRIPTION

Information on the Archaeological sites emanates mainly from the Archaeological Park of Vila Nova de Côa – recognized as a World Heritage site by UNESCO. There are in Foz-Côa, 265 archaeological sites and 31 rock art sites, scattered within an area of 200 Km², most of which are basically inaccessible. These sites have different degrees of archaeological interest. All the Archaeological Park can be freely visited, but only three rock art sites are available for guided tourist visits, with previous booking.

The rock-art sites of the Côa Valley are all protected inside the vast archaeological park. There are three main sites: Canada do Inferno, which was the first group of engravings to be discovered, very close to Vila Nova de Foz Côa; Ribeira de Piscos, at Muxagata; and Penascosa, close to the village of Castelo Melhor. A fourth site will be open soon for visitors, the nucleus of Fariseu. All the other rock art sites can be visited with guidance, if they get a “special permission”, for example for researchers or for the Côa Valley inhabitants, so they can know their homeland heritage.

Canada do Inferno – is a 130-meter-deep canyon made by the Côa River, as it flows into the Douro. Most of the 36 carvings at the site have been submerged under shallow water since 1983 as a result of construction of the Pocinho Dam. Prior to this, the area was a beach lined with east facing, vertically layered rock panels. Palaeolithic engravings of ibexes, horses, aurochs and fish and stylistically post-Palaeolithic engravings of deer and goats can be seen.

Ribeira de Piscos – is at the south end of Canada do Inferno. Its images are well better known. Visits start at the Visitor Center at Muxagata. Penascosa, which is 1 km south of the Ribeira de Piscos site on the other side of the Côa. Here, where the Valley opens up, a relatively extensive beach formed from river deposits, carvings depict ibex, horses, aurochs and some fish. Visits begin at the Visitor Center at Castelo Melhor.

Fariseu – this nucleus includes 19 engraved elements with paleolithic art along a water line between the Fariseu mountain and the left bank of the river Côa. Visits will start at the Visitor Center at Muxagata

At the Quinta da Ervamoira, in the heart of the archaeological park, is a museum that describes the region and its ancestral customs, including naturally Douro and Port Wine production.²⁶

This open air sanctuary of prehistoric humankind is the largest of its kind. The large concentration of engravings is unique and has the potential to become a very important center of attraction, not only to the Douro area, but also to the country and the world.

The site is located in the Douro Valley, not far from other attractions and important municipalities. There are special visits, pre-bookings and simple visit options available in order to discover the site. The guide services are well organized and it is easy to find multilingual guides. There are no signs altering the landscape; guides use booklets to explain the engravings. Brochures, magazines and books are available with information of the site. A total of 31 employees work in the site's conservation and administration, including 9 guides, while 11 more work as guards.

According to the experts, archaeologists working in the site, there are no congestion problems of tourists in the site. The organization of the whole park is totally respectful of the environment and the protection of the archaeological heritage is ensured. The Park publishes its archaeological research and promotes it locally, with publications, lectures and conferences. There is, as well, a local association of the park's friends. Since the dam project was cancelled and the area was designated as world heritage, the territory is well protected in a legal and practical way.

The opening of the Côa Museum for the public is scheduled for next year. Therefore, the tourism offer of the Côa Valley will be remarkably enhanced.

²⁶ Prehistoric Rock-Art Sites in the Côa Valley – World Heritage Site (unofficial but excellent website with reviews of UNESCO sites). Foz Côa – Portuguese Tourist Office.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **high performance** in the category “Archaeological sites”.

Suggestions for improvement

Number of open sites. Despite the fact that the Park has 265 sites, only 3 are open to the public. Further investment in conservation and access to a larger number of areas within this largest open-air Palaeolithic site could increase the attractiveness of the Douro Valley. The infrastructure needed to open new locations would need to be respectful of the area and adapted to the needs of visitors as well.

- > Distribution of information. There are few means of distribution of the archaeological product of the Douro Valley. Since wine is the main attraction, few people are aware of the importance of the Côa site. So, the presence of the site as a major attraction in the region could result in increased visitation with familiarization trips for tour operators and travel agencies from various European and North American markets. Informing visitors to Porto and Salamanca would attract more visitors to the whole Douro Valley. Finally the Douro Valley hotels could improve their information about the Côa Park for visitors staying already in the area.
- > Perception studies. As the archaeological site lacks information to understand the needs, expectations and experiences of visitors. The application of surveys during certain periods might provide interesting observations so as to improve the level of services and overall marketing.
- > International promotion (to be integrated into Douro's soon to be developed, Tourism Marketing Strategy). Archaeological sites need to become major attractions in the Douro Valley, and their presence highlighted in all brochures, web sites and any other promotional materials. Besides the traditional materials, in Foz Côa or a nearby town could be created a research center for prehistoric archaeology that would attract attention, and researchers from the whole world providing a new dimension in the academic and touristic milieu.

2.6.9 Information and Welcome

DESCRIPTION

The information systems for DMO's should be intimately linked to all activities as they provide access to, and facilitate, the development of an organization's knowledge base and make it readily available, not only for internal use, but to assist visitors in learning about, and making decisions in regard to destinations. Information booths, for example, facilitate the distribution of brochures and pertinent information. The right positioning of a website in the internet, the number of pages where the site has a link, the call center that can send brochures, as well as the location of tourism offices and information centers, are all part of an effective information system and represent key elements in maximizing the investment in marketing.

The Douro Valley currently has 22 tourism information centers, distributed throughout the whole region, even though some stakeholders seem unaware of the extensiveness of the information booth network. The average of languages spoken in the information centers is four – Portuguese, Spanish, English and French.

Even as the Douro Valley goes through restructuring, the actual distribution of brochures and information available for tourists should remain intact. The existing documents, including information on accommodation and activities, and generic brochures and different web sites, provide the requisite information, but the contents are regarded as poor, and many stakeholders do not seem to be well aware of the information available.

The information and welcome sector provides employment to people from the region, and counts on their local knowledge to make the difference. Information can also be obtained on a 24 hours basis.²⁷

In Porto, there are training programs for taxi drivers and police officers, which only partially serve the needs of the Douro. This program ensures that visitors receive the right information, but the program needs to be expanded throughout the region. The

²⁷ info@visitportugal.com

Sítio da Web: www.visitportugal.com

population in general is very welcoming, enthusiastic and knowledgeable when meeting visitors.

There are printed materials available of the main services like accommodation, transport and restoration, as well as on museums, activities, local events and weekend escapades mainly for the domestic or national market. The website www.aldeiasvihateiras.pt is available only in Portuguese.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **high performance** in the category “Information and Welcome”.

Suggestions for improvement

- > **Improvement of information booths.** Douro has 22 tourism booths. However, some of them need to be improved and modernised. At least some of the booths (in the key tourist areas) should provide permanent service (normally they are closed on weekends and public holidays).
- > Another challenge: The Tourism Information booths in Douro should operate and be developed on a network basis. Their overall appearance and quality service standards need to be improved. Some need to be better equipped, and have common and integrated promotional material. An exchange of information and data between the different booths would be helpful. A common program of training for all staff working at the booths could be also important to maintain and improve the quality of the service. Finally, a common brand and look (associated to the destination) would bring about greater consistency.
- > **Budget clarity.** The total amount of resources allocated to the information and welcome sector is not available. As previously noted, it is advisable to have a clear idea of the total cost of operating the both the information booths and welcoming activities in order to facilitate planning and evaluate performance.
- > **Event assessments.** There are a large number of events, but the actual number is not known. The selection of specific events for international promotion and the creation of new regional events (involving the whole Douro Valley) can be a key fac-

tor of development of the touristic offer, attracting potential visitors, and encouraging them to stay longer or visit during traditionally low seasons.

> **Visitor studies and surveys at the information booths.** Some visitor questionnaires are distributed but there is no analysis or consistent research program for the 22 booths. The Douro Valley can take advantage of the existing infrastructure to provide a general questionnaire to determine the satisfaction of the information service, as well as the destination as a whole, and visitors' experience during the trip. This is the crucial element for measuring success and that the information will be valuable in making improvements, or in rectifying problems.

> **Multilingual printed material.** The printed material available is normally in Portuguese and English, sometimes in Spanish. If the destination wants to attract the international market and provide excellent service, it is important to increase the number of languages available in the printed materials.

> **Information for persons with restricted physical ability** does not exist in the Douro Valley. This growing segment of the market that includes not only people physically challenged, but retired people, as well, is one of the fastest growing groups for tourism destinations in Europe and North America. This kind of information required is as follows:

Contact information for businesses adapted and partially accessible to disabled persons

Services available for disabled persons

Tourist information offices

Tourist attractions

Lodging

Adapted transportation services

Orthopaedic services ²⁸

> **Informing residents and industry stakeholders.** Some citizens and people working in the industry are not knowledgeable about tourism products and services, attractions and events. It is just as important to make these people knowledgeable about industry offerings as they are the Douro Valley's hosts and brand ambassadors.

²⁸ <http://www.keroul.qc.ca/en>

2.6.10 Accommodation

DESCRIPTION

The hotel industry in the Douro Valley is not very large, and many hotels have recently opened or been refurbished.²⁹ According to the INE, there are 36 establishments of accommodation (mainly hotels, not including the rural tourism sector). The CCDR-N counts a total of 2,333 beds available in the destination. The peak season extends from July to September. The average stay is 1,5 days and the average annual occupancy rate is 26.10%. The hotel industry provides work for 363 direct (INE) employees mainly of local origin.

The pattern accommodation unit is the Quinta, which for many years has been the countryside house of a vineyard. They offer different services, and some have turned into hotels. Many of the grape-growing Quintas offering accommodation are on the slopes of the Douro Valley looking down onto the river. Other units do exist in the main towns and agglomerates.

The official website has a section dedicated to the accommodation sector. All hotels and accommodation facilities have the right to be listed, explain their main services and amenities, post pictures and have a direct link their own website.³⁰ The Douro tourism sends brochures and information to the hotels about the destination, the attractions and activities, with the intention of creating synergies so as to offer a more complete experience for visitors. At least the 3 main languages are spoken in the Douro hotels – English, Spanish and French. Offering German also makes sense since the German market is third in importance for the destination according to the profile questionnaire.

The country has precise legislation concerning hotel classification. For hotels there is a system of classification of 1 to 5 stars, that matches the typical European classification system. There is a national legislation for accessibility for people with reduced capac-

²⁹ www.ine.pt; www.visitportoenorte.com; www.rt-nordeste.pt; www.rtsmarao.pt; <http://www.douro-alojamentos.com>; <http://www.douro-turismo.pt/alojamentos/>; www.hoteis.pt

³⁰ <http://www.douro-turismo.pt/alojamentos>

ity, but not all the hotel units are equipped with appropriate conditions. Measures should be taken to improve accessibility in the accommodation sector.³¹

The Strategic Reference National Framework 2007-2013, through the Operational Programme of Factors of Competitiveness, is a financial instrument (European Union Funds) that supports private projects in the tourism area (including accommodation), especially those related to improving the environment.³² In terms of green buildings, it is mandatory throughout Portugal for new buildings to have solar systems for heating water. There are also incentives for the creation of photovoltaic and wind energy.³³ There is environmental certification that can be adapted for buildings. Example of an Environmental Certification Program is the Green Key Program, integrated in the Blue Flag initiative.³⁴

Within the Territorial Management Master Plans – the Inter-Municipal Douro Territory Plan and the Municipality Master Plans – regulations apply for hotel construction in terms of water, soil, air and landscape impact, protected areas, social impact and other elements.

Several schools offer the labour needed for the accommodation sector. The main ones are: School of Hospitality and Tourism of Lamego (with an extension in Center of Mirandela); Professional School of Rodo; University of Trás-os-Montes and Douro; Superior School of Technology and Management of Lamego; School of S. João da Pesqueira (of the IEPF).

³¹ <http://www.keroul.qc.ca/en/>

³² <http://www.qren.pt/>

³³ http://www.portugal.gov.pt/Portal/PT/Governos/Governos_Constitucionais/GC17/Ministerios/MEI/Comunicacao/Intervencoes/20070313_MEI_Int_SEAll_Micro_Geracao.htm

³⁴ <http://www.abae.pt>

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **medium performance** in the category “Accommodation”.

Suggestions for improvement

- > Extremely low occupancy rates are symptomatic of problems facing the accommodation sector. If the Douro Valley wants to develop as a touristic destination, occupancies must increase in order to attract more investment and allow other related industries to grow. All the recommendations concerning promotion, marketing, branding and advertising have as a primary goal to boost the number of nights spent in accommodation facilities in Douro.
- > Accommodation capacity increase. The total capacity of accommodation should increase in the following years. A tax exemption policy for new hotels, or a promotion program for new hotels with public funds, could help develop the Quintas and expand the region’s room capacity. The increase in rooms available would have to be accompanied by important marketing efforts, particularly to brand the Douro Valley as an exclusive destination, especially if the objective is offer higher-end accommodation.
- > With an increase in the number of hotels, the number of full and part-time employees will increase.
- > Interestingly, most of the participants in the workshops were not knowledgeable about the number of hotels in the region, nor about the total rooms available. This information is crucial in established destinations, as stakeholders need this data to create business plans and to make more effective investment and other strategic decisions. The new DMO needs to address this issue and should promote studies related to measuring accommodation supply and demand, and especially visitor or guest satisfaction. The results from these studies must be distributed amongst stakeholders”
- > The creation of festivals, events and special promotions, especially during off-season periods, should be a joint effort between the accommodation sector, the DMO, the vineyards and all the other stakeholders. The image of the accommodation sector in Douro as authentic and representative of the personal touch of the

region is a good element to be used in publicizing events. The average length of stay can be increased with festivals and other activities.

> Voucher system. Vouchers purchased by visitors ahead of time, offer a number of nights stay in the Quintas. They allow visitors, especially those who are driving, the opportunity to experience different parts and experiences in the region. An innovative system of open vouchers allows clients to plan their own itinerary, come and go as they please, and at the same time take advantage of the savings offered by the hotels included in the plan. It is a perfect package for those who like to take their own time to sightsee and discover what the region has to offer. Custom-designing their own itinerary is the main advantage of the Voucher system, but the visitor also receives better rates than hotels' rack rates. Vouchers can be designed to fit all budgets by creating 2 or 3 categories according to the type of hotels.

> Quintas Association. The Quintas are a very specific kind of accommodation and many are represented by the Port Wine Route Association. This association includes different Douro Quintas promotes and provides a reservations system. It is seems appropriate at this time that this association be strengthened and repositioned so that it represents the interests of all Quintas.

2.6.11 Supporting Services

DESCRIPTION

Supporting services includes all the commercial, public, and private organizations that have contact with visitors. In the Douro Valley, Post offices, international telephone services, picture printing points, convenience stores, banks, all kinds of shops, wine shops in the vineyards, and other services serve visitors. The main emergency and information services provide on-call attention.

The country offers a consumer protection service that extends to foreigners, thereby protecting them from any situation that might arise concerning a product or service. Public services in general are opened to serve tourists, and on most occasions visitors can be served at least in Spanish or English.

EVALUATION

Based on the SMED evaluation, the Douro Valley is recognized as having **medium performance** in the category “Supporting services”.

Suggestions for improvement

- > Measuring the benefits of tourism in the local business. For the moment, there is no special tracking method to measure the impact of the tourism industry within local economies. UNWTO’s statistics department is researching the possibilities of measuring the economic impact of travel in a regional scale. Nevertheless, the new DMO needs to commission a study to determine the economic impact of tourism within the Douro Valley. Most people within the region don’t have a clear perception of the tourism impact in the regional economy and enterprises. This study will provide baseline information.



> Visitors derive their satisfaction by feeling welcome and part of a community when they visit. It is important to encourage citizens and businesses to be hospitable. Many destinations offer courses in being “super hosts”, for example. The more visitors feel at home, the more they spend and longer they stay.

2.6.12 Governance

DESCRIPTION

The Presidency of the Council of Portuguese Ministers has created a governing body, called Estrutura de Missão para a Região Demarcada do Douro (Douro Mission Structure). This organization has the mandate of (i) stimulating actions of development in an integrated way, (ii) promoting articulation between the central and local administration (with competences in the Region) and (iii) encouraging the participation and initiative of civil society.

A Douro Valley Tourism Plan does exist for the period 2007-2013. One of the responsibilities of the DMS in the tourism area is to promote the implementation of the Douro Valley Tourism Plan, which includes several measures to support projects to develop tourism in the Region. The DMS, within the scope of the Douro Valley Tourism Plan, will be responsible for evaluating and selecting the best projects to be supported by European Union Funds, which is integrated with the Operation Regional Programme for the North of Portugal 2007-2013.

The Douro Mission Structure (DMS) has a Consultative Council which includes several local, regional and national stakeholders. Besides the general meetings of the Consultative Council, the Douro Mission Structure works with different stakeholders. This structure guarantees that the opinions of various sectors are taken into account.

The DMS collaborates in the establishment of the new Douro Destination Management Organization with different stakeholders. It is part of a Working group to create the new DMO. In the past, the region had three tourism offices – each one acting independently, utilizing similar promotional methods, but with insufficient cooperation and complementary of efforts.

There is also a partnership between the public and private sector within the Regional Tourism Agency (ADETURN). This institution is responsible for promoting the Northern region of Portugal in the international markets. The responsibilities and budget are shared by both the public and private sector.

In Douro Region there is a need of having data collection, market studies and other statistical efforts to meet the requests of the tourism stakeholders and potential tour-

ism investors. In this context, the new DMO could (and should) have an important role in addressing this issue.

Even though some efforts to promote the tourism sector in the region with more efficacy and efficiency will be undertaken (through the creation of the new DMO), it is crucial that this new DMO is empowered and is provided with the necessary tools and know-how, in order to improve the governance tourism model of the region. In this context, the region will be more able to develop regional tourism and to compete in the international markets.

EVALUATION

Based on the SMED evaluation the Douro Valley is recognized as having **low performance** in the category “Governance” of the tourism sector in the Douro Valley.

Suggestions for improvement

- > **Creation of the Douro Valley DMO.** The Douro Valley should create a DMO to coordinate the touristic development of the region from a sustainable and international perspective. In the case study section of this report, various DMO's from around the world are briefly profiled.
- > **Composition of, and participation in, the DMO.** The Douro Valley should create a DMO whose Board is composed of stakeholders from all sectors of the industry, so that all points of view and opinions can be voiced. Seats on the Board might be composed of private and public stakeholders. Some memberships could be permanent (i.e. representatives of specific public agencies) and some others might change every 2 or 3 years to ensure the participation of all municipalities and private stakeholders. It is advised that the DMO encourage active participation in decision-making from all sectors. A DMO governance and ethics code, independent of the general law for public services in Portugal should exist.

- > DMO strategy. Taking its cue from the Douro Valley Tourism Plan, the new DMO should contribute to the construction of a more detailed DMO operation strategy considering at least the following items:
 - > Up to date statistical information on the region Number of tourism business. No data was obtained about the number of tourism business and organizations operating in the Douro Valley. In order to know the impact of the tourism sector and the importance of the industry for the local economy it is important to obtain information like this, as well as performance of various types of businesses, such as hotels, tour operators, attractions, etc.
 - > Economic impact. Many stakeholders need to know exactly what and how much tourism is contributing to the regional economy. Some information is available for the whole Porto-North region, but needs to be determined for the Douro Valley. This information is also important in the establishment of budgets, etc.

Operational strategies also require the existence of information and knowledge on market demand. As such it is necessary to track visitor counts, expenditures, length of stay, and so on. This data facilitates decision-making and improves knowledge of the market. Similarly it is important to have data bases of worldwide tour operators (selling Portugal and wine destinations), travel agencies, international trade media and general media, advertising, marketing, PR companies, events, as well as have an intensive system for generating and sharing business intelligence and knowledge.

Studies and analysis

As a result of the measurement system of indicators for the destination, the DMO should be able to compare periods and years in order to measure performance of the industry for a given year. The DMO should implement studies of, as well as generate information from their source markets, and obtain existing studies about tourism in general. A system to measure the experiences of visitors, collecting the opinion of residents, and generating a discussion forum for the trade (press, tour operators, travel agencies, and other stakeholders) should be considered.

System for comparing similar destinations

The new DMO could develop a comparative system of 4 or 5 similar or competitive destinations, follow their indicators, year-by-year, and make charts in terms of budget, arrivals, receipts and other indicators. Such an analysis puts the performance of Douro into perspective, and provides important information on how competitive destinations are performing.

Data based on stakeholders needs

The information obtained and published by the DMO should be useful for stakeholders and available through an intranet or another mechanism.

Sharing responsibility amongst stakeholders

The DMO should involve the hotel association, restaurant association, and other stakeholder groups to share responsibility for activities such as hosting familiarization trips for journalists; cooperating in activities to promote and enhance the presence of Douro in fairs and events.

The Douro Valley tourism award

There is a National Programme, developed by the National Tourism Authority that recognizes and gives an award to the best practices in the tourism sector – «Prémios Turismo de Portugal»³⁵ – Douro Mission Structure wants to develop a similar system. The Ulysses tourism awards of UNWTO, and the Tourism Quebec awards, are two options that can serve as a reference. The winners of the local Douro Valley awards can be nominated for the National Premios Turismo de Portugal.³⁶

³⁵ <http://www.turismodeportugal.pt>

³⁶ <http://www.bonjourquebec.com/mto/activites/grdprix/2008/index.html>

Plan for the preservation of the destination's attributes

The Douro Valley Tourism Plan takes its cues from the Rural Development Programme and the Environmental Dissonances Fighting project to guarantee the preservation of the destination's attributes. Unfortunately this is not very well known amongst stakeholders, or at least no stakeholders seemed aware of this focus. It is recommended that a mechanism to involve all participants of the industry be implemented.

- > **Green office.** Given the importance attached to the environmental challenge that the planet and our industry are facing, the DMO should request and encourage its stakeholders, partners and visitors to be environmentally responsible. The responsible DMO should consider adopting the requirements for a green office.³⁷
- > **Carbon footprint.** As a part of the image of the destination and in order to improve the environmental conditions of the region, the DMO should initiate and develop a Green Plan. There is no information available to the industry stakeholders right now concerning measures that could be taken to offset the carbon footprint generated by tourism (e.g. airplanes, boats, cars, buses and trains taken to reach the destination; and energy and heating used within the destination). Small actions can bring big changes; so, it is recommended to use a carbon footprint calculator to have an idea of the total carbon footprint generated by the local action or by the tourism.³⁸ Once the DMO has a certain idea of the total carbon footprint generated, it will be a great promotional initiative.
- > **Involvement of residents in tourism.** The participation of residents in the tourism industry is crucial. The DMO can influence the attitude of the local population by using campaigns to create awareness amongst residents as to the importance of employment, economic growth and local pride of receiving visitors with genuine hospitality. The example of *Bienvenue en France* is worth noting. The promotional efforts to let citizens know that tourism generates jobs, and that the way tourists are treated on the streets, stations, hotels and restaurants are key factors in their return to the destination, and the generation of positive word-of-mouth.

³⁷ www.thegreenoffice.com

³⁸ <http://www.carbonfootprint.com/calculator.aspx>

> **Educational programs.** To encourage more programs for higher level training, even for actual stakeholders, and international exchange among tourism schools, it is suggested that the Douro Valley establish contact with the universities of other SMED destinations, composed up-to-date of the best university and hospitality and tourism, management, hotel schools in Andorra, Canada, China, Italy and Mexico.

> **Human Resource Council.** The most important assets of the industry are those people who seek their living from tourism. People need to be attracted and retained, as they are crucial in the delivery of services and the provision of hospitality; they energize, embellish and animate; and they are the ones who through this type of actions create satisfaction, loyalty, repeat visitation, and positive word-of-mouth. Investment in training programs and developing gold standards of service is of critical importance.

> **Political support for the industry.** Mechanisms that allow the new DMO, through CCDR-N or Turismo de Portugal, to improve, or adapt, current local or national legislation in order to facilitate the implementation of recommendations and the modernization and adaptation of Douro should be considered.

> **Becoming a UNWTO affiliate member.** As a specialized agency of the United Nations, the World Tourism Organization (UNWTO/OMT) is the leading international organization in the field of tourism, acting as a global forum for tourism policy issues and a practical source of tourism know-how. The Douro Valley DMO should consider becoming an affiliate member to take advantage of the opportunities to build relationships and learn about the best practices of comparable destinations.

2.6.13 Marketing and Sales

DESCRIPTION

Until now the Douro Valley had three Regional Tourism Offices – Serra do Marão, Douro Sul and Nordeste Transmontano. The Portuguese government has determined that changes to the organization of tourism are necessary. As such a new Douro DMO Regional Tourism Office is going to be created soon. The framework this new DMO are now being developed. In addition to this new Regional Tourism Office, there are other agencies overseeing aspects of tourism: (i) the Regional Tourism Agency for the North of Portugal (ADETURN); (ii) AETUR – Douro Tourism Entrepreneurship Association; and (iii) the Porto Wine Route Association.³⁹

These entities are responsible for the marketing and promotion of the Douro Valley. To date the brand image of Douro has not yet determined. The actual marketing and branding efforts tend to emphasize the North Portugal region, where many important attractions enjoy greater prominence than the Douro Valley. North Portugal has a well organized program, and has hired a private company to do press releases both nationally and internationally.

Fortunately, Douro Valley is already positioned in the minds of many as the premier wine region of the country, and existing marketing messages and slogans are consistent with the preservation of the destination. The Douro's appeal is based on the panoramic views of the River and the surrounding hills.

³⁹ <http://www.aetur.pt>; <http://www.rvp.pt>

EVALUATION

Based on the SMED evaluation the Douro Valley receives a **low performance** in the category “Marketing and Sales”.

Suggestions for improvement

- > **An international and a national marketing department.** An international and a national marketing department integrated into the new Douro DMO are essential for the development of the Douro Valley. This department should be responsible for research, advertising, media campaigns, public relations, development of the Douro Valley brand within the national and the international markets, and cooperative advertising campaigns. Cooperative advertising allows operators and trade partners to cost-effectively promote their products and extend their advertising reach nationally and internationally through financial support from the tourism authority.
- > The Marketing area will be responsible for marketing studies, the elaboration of the DMO’s marketing strategy as well as a system of ROI (Return on Investment measurement) that can ensure the appropriate allocation of funds in the marketing and promotion of the destination.
- > This area will should consider establishing a publication and web department in charge of all printed and electronic materials and other information items that should be created, sent and updated by the DMO in order to have a single formal image of the destination with the most accurate information available.
- > In marketing there is a necessity for public relations to organize and handle all familiarization trips, press trips, crisis management communications; to follow-up on national and international press clippings; to maintain a journalists’ database; and to build and maintain relationships. Public relations should coordinate a crisis group composed of the appropriate authorities, consulates, tour operators, hoteliers and transport agencies, who can interact in the case of an accident, an attack against a tourist, or any other eventuality.
- > The touristic product in the Douro Valley has great development potential. A product development division could be responsible of creating Porto wine routes, cultural routes, and seeking investment for specific products offerings such as spas, and building potential for nature and adventure tourism, and for meetings,

incentive travel conventions and educational tourism. Product development could take responsibility, as well, for developing and helping organize new festivals and events to attract visitors during low seasons. This will contribute to create a reputation for the region as a festivals and events destination.

The website of any destination is the main window of promotion in international markets. Every year the number of internet users looking for travel information is growing. It is clear that the website being developed (www.douro-turismo.pt) will give more visibility to the Douro Valley. There is a direct relationship between the URL and the name of the destination; however, we think that the actions that follow will further enhance visibility:

- > Change the URL from www.douro-turismo.pt to www.visitdouro.com. The objective should be to harmonize the URL with all destinations within Portugal (www.visitportugal.com, www.visiteportoente.com).
- > Put forward Douro as a destination of choice on the Website of tourism Portugal (www.visitportugal.com): In the section "DESTINATIONS", Douro should appear as a specific destination.
- > Reference the destination on the principal search engines on the Web. The objective is that Douro becomes a first choice result for tourism research relating to Portugal.
- > The new site should offer more languages than the 3 proposed by the website of Porto and the North. Tourism Douro could benefit by adopting Portugal tourism's proposed 9 languages. The personalization of research based on visitors' interests, and adapted to the needs and requirements of users, would enhance accessibility and utility. Several destinations throughout the world have created websites adapted to individual markets. However, this exercise is generally the result of a study on the behaviour of major consumer markets.
- > Finally develop the transactional aspect of the website to facilitate the process of finding information, to optimize cross-selling to the destination, and to allow for reservations and booking. Several destinations now have transactional websites, for example, the Province of Quebec (www.bonjourquebec.com), Bordeaux (www.bordeaux-tourisme.com) and Liverpool (www.visitliverpool.com).

> **The Douro Valley marketing plan.** A primary activity of the new DMO should be the creation of a marketing plan which must take into account the needs of, and involve, all stakeholders and the public sector, in order to be consistent with the Touristic Development Plan for the Douro Valley.

> **Creation of a Douro Valley brand.** The logo for the Douro Valley destination is new, it has been developed for a regional tourism office (Douro Sul), in partnership with the other two regional tourism offices and other stakeholders.

Since the logo is new, existing logos are still being used in various brochures and unofficial websites. This needs to be changed. Indeed, in some materials and websites logos are not used at all.

Branding, however, is much more than a logo, and is a fundamental component of a marketing plan. The positioning of the brand in the mind and values of the consumer is the objective, and the goal is to create a link between the brand and the travel experience of the Douro Valley, which should be sufficiently engaging to encourage the consumer to visit the destination right away, or sometime in the near future. Given the fierce competition in the international tourism market, all destinations try to capitalize upon and promote their uniqueness. A good way to penetrate the market and stay in a top-of-mind position is by creating a brand that is:

- > Attractive;
- > Easy to remember;
- > Explanatory of the destinations characteristics;
- > Unique (only one Douro image for all brochures, websites and advertising);
- > Consistent over time.

The new DMO must ensure that the brand resonates with, and is relevant to, the marketplace. The new Douro brand must be used in a synergistic and unified manner, and be able to pull together disparate aspects of the tourism offerings of the region.

> **Cooperative campaigns.** Once the brand identity has been developed it can be rolled out utilizing various media vehicles. A cooperative advertising scheme is advised whereby the money invested by the DMO can be equalled or doubled by participating tour operators, airlines, hotel chains, credit cards or any other partners desirous of promoting the destination. Cooperative advertising encourages par-

ticipation by the private sector, and extends the buying power for media, thereby increasing the presence of the Douro Valley in all important markets during all seasons.

> **Innovative technologies.** The internet has been the new window for advertising during the past decade. Having a web site has been discussed, but proactive destinations are already extending its use through new ways of reaching potential visitors:

> Podcasts. People can download guides, commentary, maps, songs and other information to their MP3 or other personal electronic devices to learn about the Douro Valley.

> Interactive visits. Through the destinations website, visitors can see what the Douro Valley looks like, or have a virtual reality experience at a local museum.

> Other technologies. Free media are ideal for promoting the Douro Valley, The DMO can upload videos showing the beauty of their region. If, for example, someone types "Douro" into a search engine they could be directed to Douro videos on YouTube, to the Douro Facebook profile or to Douro commentary on Tripadvisor or Wikipedia. All these options are free and can be used by the DMO to dramatically increase the presence of Douro on the web.

> **Perception studies.** There are no perception studies for the Douro Valley. It is crucial to understand the needs, expectations and general perception of visitors, and to obtain impressions of changes to, and/or the attributes of the region. The only studies available concern the whole Porto and North region, which is not representative of the Douro case.

These studies are valuable to marketers and the wholesaler and distribution channels. They provide valuable feedback for the industry, to measure the impressions of the market, to ensure that stakeholders are satisfied with the DMO's attempts to create viable tourism products, services and experiences.

Perception studies also provide a mechanism for determining the local population's opinions and adherence to the Geotourism Charter that Douro Valley is likely to endorse.

A monitoring system for measuring the performance of advertising and various marketing campaigns, as well as the generation of conversions. It is vitally important to determine the effectiveness of extensive investments in marketing. The information provides the means for evaluating main generating markets, and can provide important information to agencies, airlines, congress organizers and incentive planners, so as to influence decision makers and to open new markets for the Douro Valley.

> **Qualified and knowledgeable staff.** At present there are only four people involved in the marketing of North Portugal. Given the specialized needs for national and international promotion and marketing there is a need to increase the size of this department. Furthermore, these employees need to be well versed in the evolving nature, and strategic significance of, marketing and the need to build stronger marketing relationships.

> **Self sustaining industry.** According to the development of the DMO, it is recommended that the financing of the promotion and marketing of the destination come primarily from the industry itself. For example, the public portion of these funds could be obtained from an accommodation tax, or other related incomes. In this way the tourism industry would be financing its own operation.

2.6.14 Sightseeing

DESCRIPTION

Sightseeing is a very important component of the touristic offer of the Douro Valley; it is generally defined as travelling about to look at places of interest. This very general definition gives us an idea of the variety of activities that exist around this activity. Sightseeing can represent totally free visits to towns, cities or the countryside where visitors wander around places of interest, to an expensive, personalized guide with car tour. Tours in open coaches, minivans, boats, bikes or by other means of transport, even hiking, compose this activity.

The Douro Valley counts more than 40 Tour Operators and Travel Agencies in the region and more than 10 Tourism Cruise Companies. There is also a public railway operator promoting tourism and historic steam trains.

The sightseeing activities are directly related to the nature and cultural heritage as well as wine production and the scenic Douro River. There are well-organized tours for towns, rural areas and wineries; schedules are respected, and hotels and tour operators work in a good coordination. Multilingual guides are available and numerous brochures, and other printed materials are used by the agencies and operators to inform their clients, mostly in English, Portuguese and Spanish.

Security measures are a common practice in vehicles and walking tours, operators are normally prepared for any incident. The National Legislation and Centers of Inspection for road transports are in charge of assessing vehicles. It is mandatory to pass a periodical inspection to vehicles. In terms of passengers' transport, the rules are more rigorous. Guides and operators are organized in a National Tourism Guides Association. Local entrepreneurs are supported with European Union Funds from the National Strategic Reference Framework for the EU Structural Funds (2007-2013) that give incentives for the creation of new companies.

It is important to mention some interesting tourism elements/products of Douro region, namely, the "Aldeias Vinhateiras" network, the Belvedere network and some spectacular panoramic views from the roads. However, these tourism products are not yet very developed. There is a potential to promote these sites so that the region could gain:

1. **Belvedere network** – Douro has been developed a network of Belvederes. Nevertheless, this network has not achieved its potential. There needs to be a coherent signage system for all belvederes and an integrated and common promotional material of this network (for example, some leaflets and maps) should be produced. These are key elements to make this product more available and appealing for tour operators and visitors.

2. **Aldeias Vinhateiras** – Douro has an interesting network of Aldeias Vinhateiras (Wine Villages). Different wine villages have been restored recovered and initiatives associated with animating them have been undertaken. This network should continue to be developed along with further initiatives for integrated promotion (in different languages) and animation. The website of this network (as already mentioned) is just in Portuguese.

3. **Road panoramic views** – Douro has several panoramic views that should be developed and qualified for sightseeing, particularly, the roads with view over the Douro River. For example, the national road 222. They should be improved in order to provide a better experience for visitors as they travel across the region. View points, terraces, signage, walking corridors and places to park are important aspects to take into account in making sure that these panoramic views provide outstanding touristic value.

EVALUATION

Based on the SMED evaluation, the Douro Valley receives a **low performance** in the category “Sightseeing”.

Suggestions for improvement

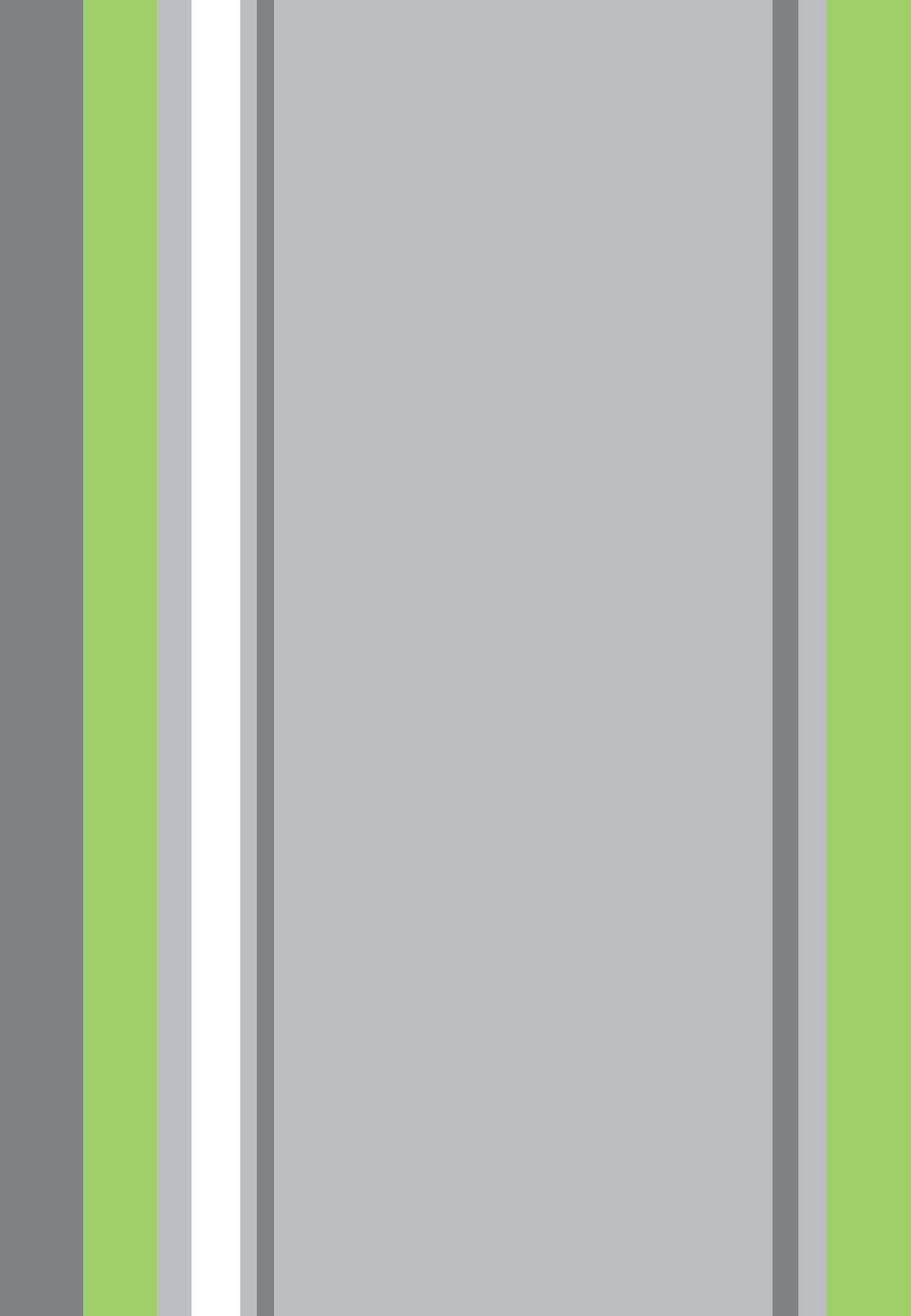
- > Information. There is no precise information about the number of tours offered and their programs. The new DMO will need help from all operators to obtain information and conduct a census that will improve the knowledge of the activity, and improve the policies applied to it.
- > The number of guides is limited according to the number of visitors. Only 40% of the guides and staff are certified. By improving this number, the general quality of the Douro experience could be improved. The languages spoken might have to increase as new markets develop. Documents in French, Italian, German or Japanese can help promote the destination abroad and improve the information to the visitors.
- > Important efforts in terms of curtailing the acoustic impact and pollution from cars, trains and boats should be carried out by the destination and operators. At a time when the whole tourist industry is taking steps to improve the quality of air, water and soil, new technologies and more efficient techniques are appreciated by tourists. “It is vital for tourism destinations [...] to anticipate the coming changes and to draw their consequences, starting now. [Adaptation] It is a long-term project that must be anticipated and carefully prepared beforehand; it is not easy to see this through successfully, because it entails, all at the same time, modifying economic circuits, introducing new technologies, carrying out intensive training, investing in the creation of new products, [...] changing the minds of public authorities, entrepreneurs, host communities and tourists.”³⁹
- > Incentives for day-trip tourists to stay in Douro. A promotion system to attract one-day tourists to stay in Douro for at least one night is an important part of a growth strategy. The easiest new client is the one that is close to the destination.

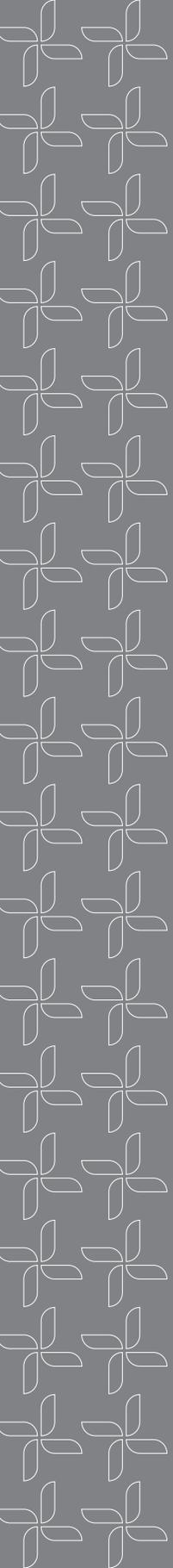
³⁹ Secretary-General Francesco Frangialli - UNWTO Summary of the technical report on Climate Change and Tourism- Responding to the Global Challenge. 2007.

Agreements with operators to include one night in Douro can be done by offering , for example, the Côa Valley attraction as an important point of interest making the one-day visit a two-day visit with a large choice of places to stay on the way. Similar arrangements can be done with the car rental companies.

It is essential that Douro enhance the sightseeing components of visitor's trips. Providing visitors with the opportunity to take in the wonders of the landscape of the valley will encourage people to stay longer, spend more, and go home with fond memories. Further investment in enhancing the Belvedere network, wine villages and panoramic views is not only encouraged, but essential to making the Douro Valley a spectacular destination.







3

Benchmarking
of other similar
destinations

3. Benchmarking of Other Similar Destinations

In order to add a complementary view to the recommendations proposed by the SMED experts, there are a series of several case studies which the Douro Valley can use to identify best practices

and avoid the bad ones. Knowing the state-of-the-art of the tourism industry's organizations, practices, and activities provides useful and powerful tools in achieving excellence.

In the case of the Douro Valley, the SMED experts, after visiting the destination and talking to the key actors and stakeholders, considered three main topics that the comparative studies should cover:

- > Successful Destination Management Organizations (DMO) :
 - > Public DMO cases,
 - > Private DMO cases and
 - > Mixed public and private DMO cases.
- > Wine tourism destinations from different parts of the world:
 - > New wine regions with new tourism industries,
 - > Relatively known wine regions with new tourism industries,
 - > Mature wine regions with new tourism industries,
 - > Mature wine regions with mature tourism industries.
- > River Discovery:
 - > European river discovery combined with wine production, and
 - > European river discovery and nature activities.

These examples will be of great interest for the decision makers in the Douro region, and helped the SMED experts to identify recommendations that best apply to the Douro Valley's situation.

DESTINATION MANAGEMENT ORGANIZATIONS (DMO's)

Acknowledging the need for the Douro Valley to create and establish a DMO, it is important to provide some background notes about DMO's, and provide three distinct examples of successful local DMO's around the world.

The DMO⁴¹

A Destination Management Organization's purpose is to lead and coordinate activities under a coherent strategy. They do not control the activities of their partners, but bring together resources and expertise with a degree of independence and objectivity to lead the way forward. DMO's must build a high level of skill in developing and managing partnerships. Though DMO's have typically undertaken marketing activities, their responsibilities are becoming far broader, that is, to become a strategic leader in destination management and development.

Destination Management Organizations generally fall into one of the following categories:

- > National Tourism Authorities (NTAs) or Organizations (NTOs), responsible for management and marketing of tourism at a national level.
- > Regional, provincial or state DMO's (RTOs), responsible for the management and/or marketing of tourism in a geographic region defined for that purpose, sometimes but not always an administrative or local government region such as a county, state or province.
- > Local DMO's, responsible for the management and/or marketing of tourism based on a smaller geographic area, or city/town.

⁴¹ A Practical Guide to Tourism Destination Management. Published and printed by the World Tourism Organization, Madrid, Spain. Copyright© 2007 World Tourism Organization. This publication can be bought online at <http://pub.unwto.org>.

What is Destination Management?

Destination management is the co-ordinated management of all the elements that make up a destination (attractions, amenities, access, marketing and pricing). Destination management takes a strategic approach to link-up these sometime very separate entities for the better management of the destination. The intent is to help avoid duplication of effort with regards to promotion, visitor services, training, business support, and to identify any management gaps that are not being addressed.

There are various options for destination management governance, as follows:

- > Department of single public authority;
- > Partnership of public authorities, serviced by partners;
- > Partnership of public authorities, serviced by a joint management unit;
- > Public authority(ies) outsourcing delivery to private companies;
- > Public-private partnership for certain functions – often in the form of a non-profit making company;
- > Association or company funded purely by a private sector partnership and/or trading – again for certain functions.
- > Regulation, licensing and classification.

The examples of DMO's referred to in the full SMED report are the following:

ABU DHABI TOURISM AUTHORITY

The Abu Dhabi Tourism Authority is the statutory body established in 2004 with wide ranging responsibilities for the promotion and development of the Emirate's international tourism industry, it covers three areas: Destination marketing, infrastructure and product development, The headquarters are located in Abu Dhabi and there are 3 international offices outside the UAE located in London, Frankfurt and Paris.

BARCELONA TURISME

The Turisme de Barcelona Consortium is the promotional body to market Barcelona as a destination. It was set up a year after the 1992 Barcelona Olympics by the Barcelona Municipal Council, the Barcelona Official Chamber of Commerce, Industry and Shipping and the Barcelona Promotion Foundation, and it is the perfect exam-

ple of a mixed consortium. The 3 principal goals of the DMO is to consolidate the number of tourists already visiting the city, attract new visitors, and promote and make cost-effective Barcelona's range of shops.

Barcelona Turisme has grown considerably since it was set up. With a budget of 4.1 million Euros in 1994, with only 44% of own resources, it now operates (2008) with a total budget of 30.7 million Euros, with 92% of the resources obtained by the institution itself. With roughly 2 million Euros public funds/year, Barcelona Turisme generates its revenues through various activities.

DUBLIN TOURISM

Dublin Tourism was established by Bord Failte (Failte Ireland) as the agency with responsibility for the servicing, developing and promoting tourism in the Dublin region. They are a state appointed, commercial agency with a membership of more than 1,400 businesses. Their principal mission is to enhance Dublin's economy through tourism development by marketing the Dublin region on a worldwide basis, as a premier destination for the business and leisure traveller. Over 1.2 million tourists use their services each year. Dublin Tourism operates a network of six tourist information and booking offices around Dublin and has five visitor attractions throughout the region.

OENOLOGICAL TOURISM AROUND THE WORLD

Sustainable wine tourism depends on identification and management of unique issues pertaining to the resources used specific forms of wine tourism development, and the specific impacts caused by wine-related tourism. There are generally 3 pillars for sustainable wine tourism: environment, economy and society:

> Environmental Sustainability

Rural wine regions are being sold as a rural paradise in which leisure, cuisine, scenery and outdoor activities are bountiful. Development occurs alongside the need to retain or attract people in rural areas, maintain aspects of traditional rural lifestyles and agricultural production, and conserve aspects of the rural landscape.

A Code of Sustainable Wine Growing has recently been introduced by the California Association of Wine Growers and focuses mainly on:

- > Environmental leadership;
- > Maintaining the long-term viability of agricultural lands;
- > Supporting the economic and social well-being of employees;
- > Respecting and communicating with neighbours and community members, and responding to their concerns in a considerate manner;
- > Enhancing local communities through job creation, supporting local business, and actively working on important community issues.

> Economic Sustainability

The wine industry can extend the revenues from their production by diversifying their activities to include tourism, not only as complementary income by selling meals, accommodation and products to tourists in the vineyards shops, but also by becoming an important promotional channel since the experience lived by the tourists will attach them to specific wine brands and thereby becoming promoters of the region and the wine of those specific producers.

> Sociocultural Sustainability

Multi-stakeholder planning processes are required, if not to achieve consensus, then at least to legitimise socio-cultural sustainability. By its very nature this is a political process. Conflict may arise with local residents concerning the following:

- > Increased traffic in small towns and congestion on long rural roads, especially if tour buses are prominent;
- > Annoyances and complaints arising from viticultural and wine-making processes;
- > Wineries competing with local businesses;
- > A perception of inappropriate types or scale of development.

All these elements should be taken into consideration and compared with the benefits in terms of image, extra income for the region, and employment opportunities that should improve for local residents. Many issues must be considered, starting with the necessity of training or retaining people for new service-sector and winery-specific positions.

The cases analysed and included in the full SMED report are:

TOWN OF OLIVER “WINE CAPITAL OF CANADA”

The case illustrates challenges facing a town that is aggressively pursuing wine tourism development, but that must deal with serious implications for agriculture, the natural environment, and the community. It can provide a useful starting point for other communities engaged in wine tourism development.

THE STELLENBOSCH AMERICAN EXPRESS® WINE ROUTES, SOUTH AFRICA

The wine routes of Stellenbosch are the closest in distance to the city of Cape Town (45-minute drive of the city centre), which is the entry port for the visitors. This is the most well-known wine region and is home to a variety of cellars producing some of South Africa’s most acclaimed wines. In 1971 Stellenbosch became the first wine region in South Africa to establish a wine route as an organised network of wineries promoting the soul of the region’s wine lands. The region’s potential for wines and tourism has seen investors from as far as France, Germany, Switzerland, Italy and United States staking their claim in the Stellenbosch wine lands. Despite being responsible for only 11% of South Africa’s wine production, the Stellenbosch region receives some 70% of all local and international awards attained by South African wines.

MARGARET RIVER, AUSTRALIA

Margaret River region has been growing grapes and producing wines only since 1967, but the area is already recognised as one of the world’s great fine wine producers. There are roughly 200 vineyards in the region and 90 wineries are listed with the Augusta Margaret River Tourism Association; new wineries open every year. The region is known for its high quality wine; it produces less than three per cent of Australian wine, but accounts for over 20 per cent of the country’s premium wine.

BORDEAUX REGION, FRANCE

Bordeaux has been officially included on the list of UNESCO World Heritage sites as of 28 June 2007. This distinction recognises the beauty and unity of style of Bordeaux's architectural heritage, which has developed harmoniously over the centuries and remained remarkably well-preserved. The Bordeaux World Heritage site is the largest urban entity to be so honoured. It covers 1,810 hectares, half of the city, from the outer boulevards to the banks of the Garonne.

COLCHAGUA VALLEY, CHILE

Wine tourism has evolved considerably in the past years in Chile. The typical winery visit of the 1990's was a 30 minute tour of the installations. Nowadays visits are more attractive and last longer in order to get in touch with all the aspects of wine production and wine tasting. The wine routes also have evolved substantially; wine producers are investing more and more on infrastructures and complementary activities such as the Colchagua Wine Road, which includes hotels, an anthropological museum, an aerial tramway and an astronomy observation centre. In the 1990's, the wineries attempted to attract tourists to diversify its revenues; it took a decade for the wine business and tourism to really take off in a common direction.

RIVER DISCOVERY DESTINATION

Given that the most important natural characteristic of the Douro Valley is the Douro River, the following cases represent two destinations designated as part of the UNESCO's World Heritage List related to fluvial waterways for tourism.

The River destinations presented in the full SMED report are:

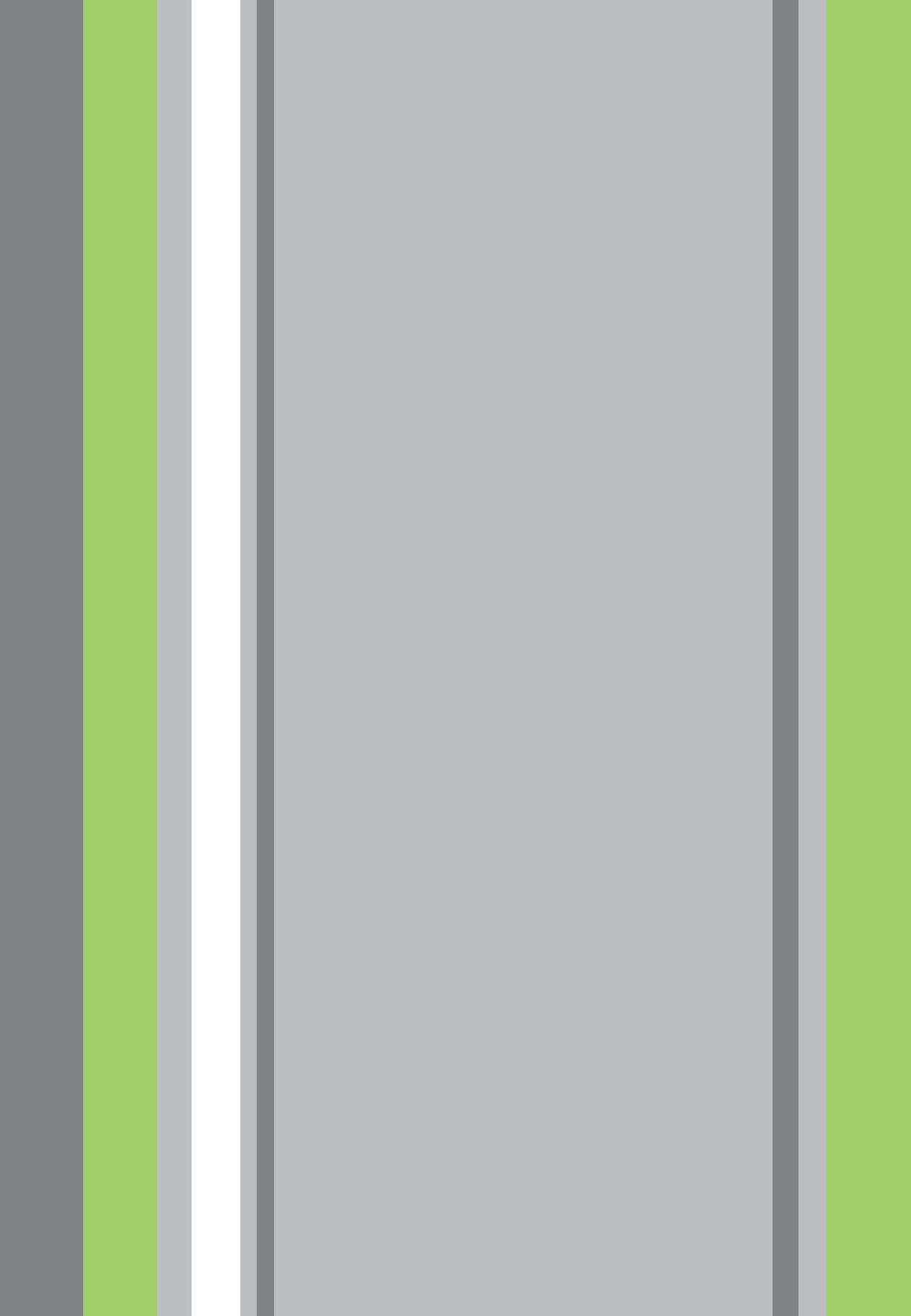
VALLEY OF LORELEY, GERMANY

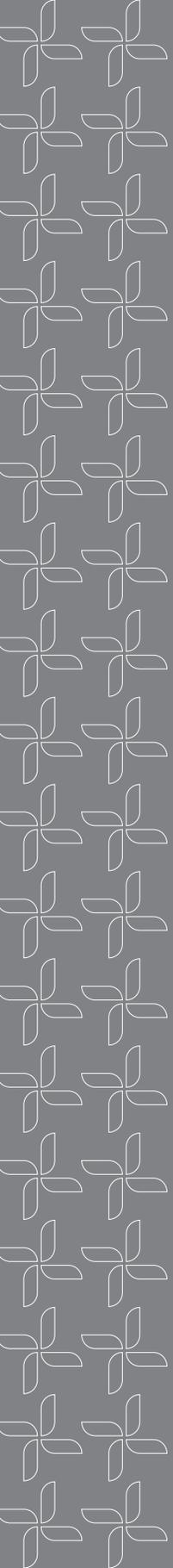
In June 2002, Germany's Upper Middle Rhine Valley was added to the list of UNESCO World Heritage Sites for its exceptional universal value. The Valley encompasses a beautiful 40-mile (65 km) stretch of river landscape between Bingen and Rudesheim in the south and Coblenz in the north. Cutting deeply into the countryside and protected by the mountainous ridges of the Hunsrück range, the Upper Middle Rhine Valley is a natural environment, with a favourable climate. In fact, the

Valley even provides a habitat for plant and animal populations that normally occur in the milder regions of the Mediterranean and south-eastern Europe.

SOGNEFJORD, NORWAY

Nærøyfjord is a 17 km long branch of the Sognefjord, which is Norway's longest fjord, stretching over a distance of 204 km. Located in the western part of the country, it is only 300 m at the narrowest, and more than one kilometre at the widest. Its depth varies between 10 and 500 m, and the surrounding mountains are up to more than 1400 m high. On 14th of July 2005, the Nærøyfjord and the surrounding area were inscribed on UNESCO's World Heritage List together with Geirangerfjord.





4

Follow-up for
Continuous
Improvement

4. Follow-up for Continuous Improvement

SMED is a tool in constant evolution; the recommendations and analysis performed in a destination are the first step of a long-term partnership between CED and the SMED destinations. Through time, the SMED community of evaluated destinations will grow, and all participant destinations will continue to benefit from the exchange of information, best practices, and innovative programs or solutions that might apply to the Douro Valley's needs. As a part of an evolving exercise, it is proposed that another SMED evaluation be conducted in 4 to 5 years time, in order, to determine how the recommendations helped the destination, and to identify new areas of improvement.

As a first step in the continual improvement of the SMED community, the Douro Valley schools could start exchanges with some tourism and hotel schools that recognize the benefits of

working in an international exchange program. Representatives from the Institut du Tourisme et d'Hôtellerie du Québec in Canada, The Calabrian Higher Institute of International Politics (ISCaPI) in Italy, the Université du Québec à Montréal in Canada, and the National Polytechnic Institute's (IPN) Superior School of Tourism in Mexico, are already analyzing the project to which the Douro's school could join in the coming weeks.

SMED destinations will be identified in the CED's website starting on January 2009, in which the commitment towards excellence will be outlined, and destinations will be informed of news releases, studies, or information available. **The continuous growth in the number of destinations evaluated by the SMED will certainly increase the possibilities of exchange within our community to accompany destinations worldwide towards excellence.**

TAYLORS



Appendix 1

The stakeholders participating in at least one workshop is as follows:

AETUR Alberto Tapada
Assoc. Mun. Vale do Côa João Sarmento Cunha
AVEPOD Joaquim Morais Vaz
Beira Douro Rui Oliveira
Beira Douro Miguel Santos
Câmara Peso da Régua Mário Montes
CCDR-N Estela Alegria
CCDR-N Jorge Coutinho
CCDR-N Alexandra Duborjal Cabral
CCDR-N Ricardo Sousa
CCDR-N Tânia Braga
Cenários d'Ouro Pedro Colaço Rosário
R.Turismo Douro Sul Paula Reis
DRCN Helena Gil
EHT Lamego – Turismo de Portugal Paulo Vaz
EP Estradas de Portugal Manuela Mesquita Trindade
Hotel Lamego Nuno Casanova
Hotel Miracorgo Vitor Castro, director
Hotel Régua Douro Ricardo Esteves, dir. Comercial
Museu do Douro Fernando Maia Pinto
Nervir Manuel Coutinho
Quinta do Vallado João Alvares Ribeiro
Porto Convention Bureau Luis Novais Machado
Porto Convention Bureau Rosa Maria Koehler
IPTM-DND José Manuel Coutinho
Quinta da Pacheca Catarina Serpa Pimentel
Quinta da Barroca António José da Silva Texeira
Quinta do Vallado Alexandra Machado

Restaurante D.O.C. Pedro Cardoso
R. Turismo Serra do Marão Alexandre Guedes
Turihab António Carlos Pinto Ribeiro
Turihab solares de Portugal Ana Maria Pinto Ribeiro
Turismo de Portugal Maria José Coelho
Turismo de Portugal M. João Colares Pereira
Turismo de Portugal Alberto Marques
Unicer Turismo Sandra Lorenz
Unicer Turismo Jose Leal
Unicer Turismo – Aqvanatur Carla Vaz
Rota do Vinho do Porto António José da Silva Texeira

CED experts carried out a total of 11 interviews with some of the following key people/areas of the Douro region:

- > José Marques, President of the Sabrosa municipality.
- > Mario Montes, Councilman of the municipality of Régua.
- > Ricardo Sousa, CCDR-N transport area.
- > Paulo Vaz, Director, Hotel and Tourism School of Lamego.
- > Fernando Maia Pinto, Director, Douro Museum Foundation.
- > Ricardo Magalhães, Chief Project of Douro Mission.
- > Nuno Fazenda, Expert-coordinator of the Regional Tourism Agenda of CCDR-N
- > Paulo Gomes, Vice-president of CCDR-N for Environment, territorial planning and regional development.
- > Teresa Lehmann, Vice-president of CCDR-N for International cooperation, innovation and regional development.
- > João Alvares Ribeiro, owner / manager, Quinta do Vallado.
- > Marta Sá Lemos, Executive Director of ADETURN Turismo Norte de Portugal.

Appendix 2

SMED EXPERTS TEAM

The first SMED Pilot project is very important for CED since it represents the first field experience of the system and will become the example to be followed by all the other evaluations that the centre will perform in the future. For these reason the decision on the team of experts was based on the formation and experience of the Director General, the Director of Operations and both liaison officers in Washington and Madrid.

Prof. Dr. François Bédard – Director General of CED

Holding a PhD in Management Sciences from the Université Paris I Panthéon-Sorbonne and an MBA from HEC Montréal, François Bédard has thirty five years of experience in tourism as manager, international consultant and academic. Since 1993, he has been professor at the Ecole des sciences de la gestion, the Business School of the Université du Québec à Montréal.

Dr. César Castañeda – Director of Operations of CED

Mr. César Castañeda has a PhD and a DEA in Economic History from the École des Hautes Études en Sciences Sociales (EHESS), Paris, France and 10 years experience in the tourism sector.

Prof. Dr. Don E. Hawkins – SMED expert and liaison officer of the CED in Washington

Dr. Don Hawkins is the Dwight D. Eisenhower Professor of Tourism Policy at the George Washington University School of Business in Washington, D.C., U.S.A. Hold-

ing a Ed.D. from New York University, Dr. Hawkins has extensive international experience of more than 30 years.

Tommy Byrne – Liaison Officer of the CED to UNWTO

Mr. Tommy Byrne holds a *Diplôme d'Etudes Approfondies* (DEA) in International History and Politics from the Graduate Institute of International Studies, Geneva, Switzerland. Prior to the DEA, Mr. Byrne studied International Relations at York University-Glendon College, Toronto.

Appendix 3

A.3.1 Preamble: MOU between CED and UNWTO

Summary of the Memorandum of understanding, between THE WORLD TOURISM ORGANIZATION (UNWTO) and THE WORLD CENTRE OF EXCELLENCE FOR DESTINATIONS (CED).

The Memorandum of Understanding (MOU) between UNWTO and CED commits both entities to work collaboratively on creating strategies and disseminating know-how and good practices which help tourist destinations reach excellence by:

- > Enhancing understanding and implementation of sustainable development practices by all the public and private stakeholders involved in tourism governance and management.
- > Providing catalytic tools which articulate, promote and enhance excellence in destinations; and
- > Documenting and sharing lessons learned.

UNWTO and CED maintain open and pro-active communication regarding project funding and partnerships. Although CED is supported by UNWTO, it will remain intellectually and programmatically independent, unbiased by political agendas or motivations.

UNWTO offers integrity and credibility to the process of selection and management of destination stewardship. To maximize the partnership with CED, UNWTO agrees to provide to the CED relevant documentation and material (surveys, research etc.) that the Organization has conducted or will undertake, related to “destination management”, “destination quality”, “sustainability indicators”, etc., UNWTO will use the CED as a channel for the implementation of part of the activities supported by the UN-

WTO Destination Council, facilitate the participation of the Destination Management Organizations from the developing world and in particular from the less developed countries which are members of UNWTO, in the destination excellence measurement system, which will be launched by the CED, and identify a group of selected countries at a global level which will act as pioneers in the implementation of the policies of quest for excellence which will be initiated by the CED.

UNWTO and CED agree to coordinate and harmonize their programme of work in the field of Destination Management and in particular on quality issues in order to promote synergy between the two organizations and to avoid duplication of work.

All the documents related to the management of the CED, including its internal and external audit and accounting reports will be communicated by the CED to the UNWTO Secretariat.

A.3.2 Partnership Agreement between CED and CCDR-N

AGREEMENT OF COOPERATION

The WORLD CENTRE of EXCELLENCE for DESTINATIONS (CED), represented by its President, Mr. André VALLERAND signed an agreement with the following institutions in Portugal:

- > COMISSÃO DE COORDENAÇÃO E DESENVOLVIMENTO REGIONAL DO NORTE (CCDR-N), represented by its President, Mr. Carlos LAGE
- > ESTRUTURA de MISSÃO do DOURO (EMD), represented by its Chief Project, Mr. Ricardo MAGALHÃES
- > TURISMO de PORTUGAL (TP) represented by its President, Mr. Luís PATRÃO
- > ASSOCIAÇÃO para o DESENVOLVIMENTO TURÍSTICO da REGIÃO do NORTE (ADETURN) represented by its President, Mr. Jorge OSÓRIO

CONTEXT

Being Douro (a site classified as World Heritage by UNESCO) identified in the National Tourism Plan of Portugal (PENT) and in the Regional Tourism Agenda (Tourism Policy and Strategy for the North of Portugal) as a tourist priority area (where the issues concerning sustainability and excellence are essential for Tourism in Douro), CCDR-N has requested to CED to conduct a SMED Predevelopment Visit in the Douro Region.

All the partners of the present Agreement are considered as co-executives. In other words, they shall all complete one or several of the actions referring to the SMED Predevelopment Visit and subsequent actions.

THE CONSULTATION ACTIVITIES

The SMED Predevelopment Visit shall include consultation workshops and interviews.

The EMD shall be responsible for organizing the Consultation Activities, which shall be conducted by the CED Representatives. The Consultation Activities shall take place in English; The EMD and the CED Coordinator shall jointly select the Destination Experts who will be invited to participate in the Consultation Workshops from the names provided by the EMD. The optimal number of participants in each Consultation Workshop will be between six (6) to twelve (12) persons, depending on the subject matter to be covered in a particular Workshop. The CED Representatives shall be responsible for conducting the Consultation Workshops. The EMD shall be required to participate in each Consultation Workshop. The estimated time for each Consultation Workshop is about three (3) hours. The Interviews will be based on the information provided by the Destination Experts in connection with the CED Questionnaire and in the Consultation Workshops. One of the CED Representatives shall conduct the Interviews. It is estimated that each Interview will last about a half (½) hour. Around twenty (20) Interviews will be required.

BENEFITS AND OUTPUTS

The CED Experts prepare a report for the CCDR-N, which contains a characterization of the Destination based on eleven fields of excellence, or dimensions, as well as recommendations for improvement. It also contains Study cases of similar worldwide destinations, to be able to give Douro useful information on ways to improve each field of excellence, as well as declaring those categories that achieve excellence. The Visit Report shall be confidential. After the delivery of the final SMED report, the CCDR-N will be in conditions to announce (in public terms) the fields/areas of excellence, and if the CCDR-N considers it appropriate, it can do an edition of the main results of the report with the supervision of CED.

The agreement was signed on the 8th day of May 2008 in the city of Porto, Portugal by the following signatories.

WORLD CENTRE OF EXCELLENCE FOR DESTINATIONS

André Vallerand, President

COMISSÃO DE COORDENAÇÃO E DESENVOLVIMENTO REGIONAL DO NORTE
(CCDR-N)

Carlos Lage, President

ESTRUTURA DE MISSÃO DO DOURO (EMD)

Ricardo Magalhães,
Chief Project Douro Mission Structure

TURISMO DE PORTUGAL (TP)

Luis Patrão, President

ADETURN

Jorge Osório, President

