

## National Tourism Plans

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### Overview:

Government-led tourism strategies is very common internationally (predominant within OECD countries). The reasons for this are:

- Recognition of acute horizontal and vertical coordination problems in government and the private sectors given the diverse and fragmented nature of tourism and tourism governance
- A common policy focus on tourism as a sector for regional development and employment (particularly within the EU as part of redistribution policies)
- Most governments operate tourism destination marketing agencies and national tourism strategy is driven from this role (most often resulting in tourism strategy that is actually short term destination marketing strategy).

Of OECD Countries, only Sweden explicitly identified that its Tourism Strategy is industry developed and owned with a subsequent government enabling programme.

Highly developed countries tourism strategies are shifting from marketing and sector support to innovation and productivity. Of particular interest for New Zealand are:

- The UK which identifies productivity and competitiveness as primary objectives of its tourism strategy (i.e. not just arrivals and receipts).
- Switzerland which focuses on 'framework conditions' (strategic issues management and interdisciplinary tasks) in addition to 'destination promotion' (marketing and, notably, innovation). The Swiss approach to framework conditions is one of the only strategies that that acknowledges that a big part of running tourism well is managing challenges as they arise, e.g. building a strategic responsive capability.

A large number of plans are available. All of NZ's key competitors appear to have a strategic national Tourism Plan in place.

Plans are focused and targeted and are aggressive in goals and outcomes.

Further highlights risk that NZ will be left behind if it does not have a strategy in place to guide activity and investment.

## Duration of plans

Plans vary in duration period and level of detail/actions. They look like they are often refreshed, e.g. Iceland plan replaces a previous plan from 2011

Market	Launched	Length (years)
Australia	2012	8
Bermuda	2012	10
Brazil	2007	3
Britain	2012	8
Canada	2012	3
China	2013	7
Cook Islands	2005	10
Fiji	Not stated	Not stated
Finland	2011	9
Iceland	2013	10
Ireland*	2003	10
Japan	2012	4
<i>New Zealand - proposed</i>	<i>2013</i>	<i>12</i>
Philippines	2011	5
Portugal	2007	Not Stated
Scotland	2011	9
South Africa	2011	9
Spain	2012	3
Sweden	Not stated	Not stated
Turkey	2007	16
USA	2012	9

\*Interim report 2008

## Brief overview of other countries NTP's

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### USA: National Travel and Tourism Strategy –Task force on travel and competitiveness 2012

Government led

Published: 2012

Period: 2012 to 2020

#### General Comments/ Background

On current market mix, trends, travel and tourism federal properties, visas, competitor destinations  
The opportunity –working together to create economic growth.

Promoting the USA –competitive advantage e.g. range of destinations/ regional cultural activities

Enabling and enhancing travel to and from the USA –institutional barriers, airline entry, service levels, visas

Providing world class customer service and visitor experience

Coordination across government –currently no overarching federal coordination of travel and tourism policies and program

Conducting research and measuring results –timely and useful data are integral to successful branding, marketing and sustainability of the US as a visitor destination. Metrics need to be developed to evaluate progress on goals delineated in the National strategy

#### Key Strategies/Priorities

Goal: increase American jobs by attracting and welcoming 100 million international visitors

Promoting the USA –increase US travel and tourism export earnings and encourage Americans to travel within the US and its territories. This includes promoting attractions “off the beaten track”

Strategy One: Provide a welcoming entry experience to foreign visitors

Strategy Two: Coordinate with Brand USA and leverage partnerships

Strategy Three: Enhance federal promotional efforts

Strategy Four: Provide user friendly planning tools and resources e.g. updated data, better tools and identify future opportunities

Enabling and enhancing travel and tourism to and within the USA –reduce barriers to trade and make it safer and more efficient for visitors to enter and travel within the USA and its territories

Strategy One: Lower barriers to trade in travel services and measure trade flows e.g. Aviation liberalisation, engage with international partners

Strategy Two: Streamline the visa application process e.g. pursue streamlined program for low risk applicants

Strategy Three: Improve customer service at entry ports

Strategy Four: Enhance passenger screening

Strategy Five: Maintain and improve transportation infrastructure e.g. update air systems and infrastructure

Providing world class customer service and visitor experience -provide a high quality visitor experience for US and international visitors to achieve high customer satisfaction and inspire repeat visits

Strategy One: Improve visitor services at federally-managed sites(including accessibility and promoting regional tourism)

Strategy Two: Foster a skilled hospitality and tourism industry workforce

Strategy Three: Support small business in travel and tourism e.g. expand outreach and education, promote existing small business and expand access to capital

Coordinating across government –prioritise and coordinate support for travel and tourism across the federal government

Strategy One: Establish travel and tourism as a US government priority e.g. reinvigorate the tourism policy council, conduct outreach with public and private sector partners

Strategy Two: Support tourism development e.g. coordinate and publish datasets, engage the public (residents as stewards and ambassadors in preserving, developing, promoting and managing tourism resources as a source of community pride and economic empowerment

Conducting research and measuring results –collect and analyse data to support decision making in the public and private sectors and allow the government to better measure the effectiveness of its efforts to increase travel and tourism

Strategy One: Conduct research

Strategy Two: Monitor and evaluate results including metrics on progress of the strategy

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## Canada's Federal Tourism Strategy: welcoming the world

Govt led-whole of govt approach

Published: 2012

Period: 2012 to 2015

### General Comments/Background

Highlights in addition to important economic benefits tourism allows Canadians to share their heritage with one another and with the world. It forges links, promotes understanding and encourages respect for the natural environment

High proportion of SMEs in Canada: 98%

Background –challenges and opportunities include global growth, Canada’s competitive position, visitor mix, recent trends and implications for the future

What needs to be done includes better awareness of Canada, access and movement of travellers, product development and investment and improved skills and labour

Capitalise on strengths in an increasingly competitive environment –mentions other countries such as Australia and NZ have put in place long-term tourism strategies that go well beyond marketing and promotion and include whole of government approaches

How government supports tourism-federal investments and support for the industry, funding programs that support tourism businesses, the direct control and operation of iconic tourism attractions and programs to market tourism as a destination. Provides examples such as the 2010 Winter games afterglow, marketing campaigns, innovative tools such as industry tool kit, facilitating ease of access and movement for travellers e.g. Blue Skies policy has encouraged long term sustainable competition and the development of new or expanded international air services, speeding up access to visas, enhancing passenger convenience (Canadian Air Transport Security Authority Screening –smarter, more efficient and more effective).

Gathering World class statistical analysis and research

### **Key Strategies/Priorities**

- Increasing awareness of Canada as a premier tourist destination.
- Facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada’s borders.
- Encouraging product development and investments in Canadian tourism assets and products.
- Fostering an adequate supply of skills and labour to enhance visitor experiences through quality service and hospitality.

### **Implementation**

Implement a whole of government approach to enhance the federal government role as an effective partner with industry and other levels of government in support of an internationally competitive tourism sector

#### *Guiding Principles*

- Foster an open and cooperative partnership with the tourism industry
- Apply a tourism lens to policy and program development
- Enhance program coherence and accountability among federal departments
- Focus future tourism investments on federal tourism strategy priority areas

*Turning the principles in to actions*

- Develop a forward agenda for tourism, including legislative, regulatory, policy, program and operational initiatives from individual departments and agencies
- Create a tourism business website –central portal to get information
- Formalise tourism industry engagement
- Coordinate tourism research
- Produce a tourism annual report to keep stakeholders informed of progress

A key component is encouraging product development and investments in Canadian tourism assets and products including agricultural and rural linkages, cultural programming and regional development

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## PORTUGAL: NATIONAL STRATEGIC PLAN FOR TOURISM: Fostering the Development of Tourism in Portugal

Published: 2007

Period: Not Specified

Who by: Government (not industry)

### Key Strategies/Priorities

Portugal should be one of the fastest-growing destinations in Europe, through development based on enhancement and competitiveness of the offer, transforming the sector into one of the key growth drivers of the national economy.

*Vision for national tourism:*

- One of the fastest-growing destinations in Europe, driven by a value proposal based on the country's distinctive and innovative characteristics
- Development of tourism based on enhancement and competitiveness of the offer, geared by environmental and urban-planning excellence, training of human resources and both business and public bodies dynamics/modernisation

Growing importance in the economy, constituting one of the key drivers of social, economic and environmental development at regional and national level.

### Key Strategies/Priorities

1. **Outbound markets** - Commitment to attracting tourists from international outbound markets and development of domestic tourism
2. **Product strategy** - Consolidate and develop 10 strategic tourism products
3. **Guidelines for the regions** - Develop distinctive offers for the regions, aligned with the value proposal for Destination Portugal, capitalising on the natural vocation of each region and developing their enhancement factors
4. **Guidelines for poles** - Develop 6 new tourism poles in order to diversify the tourism offer in Portugal and implement a model of sustained development

5. **Air access** - Strengthen air access with the cities/regions that have greatest tourism potential in each outbound market
  6. **Events** - Foster a national calendar of events that will reinforce the notoriety of the tourism destination and enrich the tourist's experience
  7. **Enrichment of the offer** - Develop and innovate Portuguese traditional content that will constitute factors of tourism differentiation
  8. **Urban, environmental and landscape quality** - Transform urban, environmental and landscape quality into a fundamental component of the tourism product in order to valorise and enhance Destination Portugal
  9. **Quality of service and human resources** - Strengthen the quality of Portuguese tourism during "moments of truth" of interaction with the tourist, by means of implementation of a quality system for tourism training and enhancement of human resources
  10. **Promotion and distribution** - Implement an innovative approach, communicating a differentiated value proposal, intervening in each outbound market and segment, conferring greater focus on the Internet channel, fostering proactive management of the relationship with intervening parties and defining Destination Portugal as a priority
  11. **Effectiveness and modernisation of the actions of public and private agents** - Facilitate interaction between companies and the state, promote the dissemination of knowledge, stimulate research and development and the adoption of innovative practices by companies, and encourage business modernisation
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## **ICELAND: Promote Iceland: Long-term strategy for the Icelandic tourism industry**

Government led (not industry)

Published: Feb 2013

Period: 2013 to 2023 (next ten years) (follows on 2010-2020 strategy)

### **General Comments/Background**

*Note: report is interesting read. Tourism sector grew while rest of the country crashed. Looks like Visitor numbers grew only steadily but visitor value grew quickly. Iceland sees NZ as a competitor.*

Mission

*To become a leading global sustainable tourism destination, offering a distinct year-round product encapsulating the unique natural and cultural attributes of Iceland.*

### **Key Strategies/Priorities**

Objective 1: Sustainable tourism and the green economy

- Maximise the economic contribution of the tourism sector through green and sustainable growth.
- Create an enabling environment for sustainable investment with a unified approach.

Objective 2: Market focus and segmentation

- Simplify and consolidate brands in order to ensure a consistent image and messages across all channels.
- Attract a balance of volume and high yield low impact visitors year round.

#### Objective 3: Product development and investment

- Create alternative circuits to the Golden Circle in order to distribute visitor flows better and accommodate sustained growth year round.
- Promote investment through public private partnerships jointly and individually.

#### Objective 4: Organising the industry for success

- Make sustainability a core development and investment criteria.
- Introduce a tourism strategy group to facilitate collaboration, consensus building and an integrated approach to tourism development at central government level.
- Improve industry collaboration through an improved institutional framework, further development of clusters and establishing regional champions.
- Provide clear zoning and policy documents for each region with engagement at both local and central government level.

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### Australia Tourism 2020

Published: 2012

Period: 2012 to 2020

Who by: Government (not industry)

#### **General Comments/Background**

“enhance growth and competitiveness in the tourism industry by focussing on six strategic areas”

All these areas have an objective, action, key deliverables and measurements against them

The National long term tourism strategy has been integrated with the growth aspirations of the 2020 Tourism Industry potential

#### **Key Strategies/Priorities**

##### ***Strategic Focus Areas***

Growing market share including growing demand from Asia

Build competitive digital capability

Encourage investment and implement regulatory reform agenda

Ensure tourism transport environment supports growth

Increase supply of labour skills and indigenous participation

Build industry resilience, productivity and quality

Improving yield

Improving dispersal

Strategic aviation growth

Attracting investment for a more appealing Australia

Improving capital efficiencies

Building labour and skills capacity and productivity

### ***Demand Side***

Focus on the consumer

Industry development

Aviation partnerships

A dedicated China plan

A continued global markets strategy

### **Implementation**

Strong focus on leveraging off working groups to support the work along with a solid communications strategy

Implementing the potential: A stepped approach with deliverables set at each stage of implementation

#### *Phases*

##### *Setting the Foundation 2011 to 2014*

Putting the fundamentals in place e.g. increased investment

##### *Seeing the results 2015 to 2017*

Based on a strong foundations, results start to be seen

##### *Achieving the Potential 2018 to 2020*

Unification will influence achieving the potential –a competitive, profitable industry with a bright future for the benefit of Australia

## **Britain: Visit Britain: Delivering a Golden Legacy - A growth strategy for inbound tourism to Britain from 2012 to 2020**

Published: 2012

Period: 2012 to 2020

Who by: Government (not industry)

### **General Comments/Background**

Challenges e.g. addressing both mature and emerging markets, defending market position and reversing decline

Global trends e.g. patchy global economic performance, opportunities for Britain e.g. prominence following the London 2012 games

Barriers to growth e.g. Britain's image is good but competitors do better on some key aspects

Clear sense of unity needed between industry, government departments and agencies to unite behind a clear and long term ambitious goal

Themes around getting more international visitors and getting more UK citizens to stay at home and travel

Focus on 'who are Britain's competitors?' and positioning in the global market place

### ***Four Categories in to which Britain's main source markets can be grouped***

Re-energise: Large value/volume markets that deliver revenue now and where Britain need to continue to compete for visitors

Grow: Medium sized markets that deliver well now with good growth prospects e.g. Nordics

Make: Fast growing markets where Britain needs to compete more effectively to safeguard future tourism for Britain

Nurture: Markets that are of interest and where Visit Britain doesn't currently invest e.g. South Korea

### ***Ambition***

Measurements based around visits by 2020, additional visitor spend and support for additional jobs per annum. Scenario based where certain variables remain unchanged e.g. transport capacity or visa issuance. The UK identifies productivity and competitiveness as primary objectives of its tourism strategy (i.e. not just arrivals and receipts)

### **Key Strategies/Priorities**

- Image
  - Marketing strategy
  - PR & Digital

- Promoting luxury and family offers
- Deliver GREAT
- Value messaging
- Travel Trade
  - Deliver product & distribution strategy
  - Review of Visit Britain partnerships
- Product
  - Regional product development & promotion
  - Britain business & events tourism strategy
  - Deliver a London plus plan to promote visits
- Access
  - On-going visa improvements
  - Aviation route development support
- Flexibility
  - Support tourism in nurture markets

### **Ireland: New Horizons for Irish tourism (Interim Strategy report)**

Government led

Published: 2003

Period: 2003 to 2013

#### **General Comments/Background**

In its 2003 report, New Horizons for Irish Tourism: An agenda for action, the Tourism Policy Review Group set out a comprehensive tourism development strategy covering a 10 year period to 2012. This was reviewed in 2008.

#### **Key Strategies/Priorities (as set out in the 2003 plan):**

- Business environment
- Competitiveness and value for money
- Access transport
- Communication and information technologies
- Product development and innovation
- Marketing and promotion
- The people in tourism
- Government leadership
- Information, intelligence and research
- Implementation arrangements

New emerging issues in the context of the key drivers of tourism performance have come to the forefront:

- Ireland's international image
- New prospects in North-South relations
- The spatial challenge i.e. regional dispersal
- Diversity
- Global economic uncertainty

*Key Measures:*

Overseas visitors

Revenue earnings

Domestic holidays

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### **Japan: Tourism Nation Promotion Basic Plan**

Published: 2012

Period: 2012 to 2016

Government led

#### **General Comments/ Background**

Government wide effort should be made to promote measures for becoming a tourism nation based on the following policy:

- Recovery from disaster
- National economy development
- Enhancement of mutual international understanding
- Stabilisation and improvement of people's lives

#### **Key Strategies/ Priorities**

- Broadening of the base of tourism –expansion of international tourism markets
- Branding of tourist areas-destination management
- Improvement of the environment for accepting travellers from overseas –
- Promotion of tourism in major cities
- Broad cooperation amongst multiple areas
- Innovative activities that will be a model of new destination management
- Participation of the tourism industry
- Human resource development in the tourism field
- Cooperation among entities concerned, including related ministries and agencies
- Advanced MICE marketing strategy and the MICE competitiveness
- Promotion of a number of sectors e.g. health tourism, sport tourism

- Maintenance and improvement of tourism related statistics

#### Targets

- Domestic travel consumption
- The number of foreign visitors to Japan
- The number of international conferences held
- The number of nights per person spent for domestic travels
- The number of Japanese travellers going overseas

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### Bermuda

Published: 2012

Period: 2012 to 2022

Government led

#### **General Comments/Background**

Diagnostics – Strategy – Action Plan

Consultation with more than 200 stakeholders

Stakeholders across the tourism value chain have an important role to play in the implementation of the plan e.g. accommodation, transportation and support services

Seasonality identified as a major issue –limiting business and job opportunities

Tourism development challenges include lack of clear positioning and brand identity, high competition, high seasonality, limited quality of products and services and low investment appeal: high investment costs and high operational costs

Top strengths that need to be leveraged include historical legacy as a high-end destination, high end market appeal, distinctive tourism hubs and close proximity to major source markets

#### **Key Strategies/Priorities**

- Build unique and create competitive positioning
- Create new demand and reduce seasonality
- Rebalance air versus cruise
- Increase visitor spending
- Improve quality throughout tourism value chain
- Build pride and create jobs
- Support business development and attract investment

- Create economic, social and environmental sustainability

## **Implementation**

Programmes with implementable solutions

Marketing Programme

- New positioning
- New niche marketing
- Build pride campaign

Product and destination development programme

- New destination hubs
- New products –these are focused on 7 tourism products in order to create demand drivers and reduce seasonality e.g. cultural tourism, Business and MICE, sports tourism, leisure and entertainment tourism, nautical tourism, cruise tourism

Total quality management programme

- Total quality solutions
- New training solutions

Infrastructure Programme

- New infrastructure solutions
- Protection of natural and cultural resources

New infrastructure solutions are needed to support the tourism plan; resources need to be managed in sustainable manner e.g. new national connectivity transportation solutions

Global governance programme

- New support for small business
- New supportive governance structure

Support business development and create investment opportunities e.g. strategic alliances and partnerships, investment attraction and facilitation

Multiple levels of tourism awareness are introduced through the tourism plan through:

- International brand awareness
- Local tourism awareness of tourism benefits
- Tourism job opportunity awareness
- Sustainability awareness and incentive programme

Starting Points

- Don't need major investment to start

- Need quick wins
- Investment in people and organisation of current resources
- Collaboration, organisation, common objectives
- People with energy and determination

## Spain: National and Integral Tourism Plan

Published: 2012

Period: 2012 to 2015

Government led

### General Comments/Background

#### *Taking Stock*

#### Opportunities and Threats

Threats include the worsening economic downturn in Europe, threats from competitor destinations, high seasonality, improvement of developing countries' brand

Opportunities include emerging outbound tourism markets, wide range of intermediaries ready to promote products with a distinctive, standout feel in markets looking for new experiences

#### Strengths and Weaknesses

Strengths include the brand, focus on clients, knowledge and alignment of public-private sector stakeholders, high degree of loyalty in traditional European markets, tapping in to the growth in emerging countries, great quantity and variety of infrastructure suitable for tourism use, World leader in seaside-resort tourism

Weaknesses include sliding down the future brand index, weak commitment of Spain's entrepreneurship to construction of the Spain brand, demand concentrated in a handful of countries, low rating as a destination by tourists who have not yet visited Spain, heavy seasonality of seaside-resort tourism, high environmental impact of the Spanish tourism sector, low innovation investment in tourism firms, dispersion of service standards

#### Alignment of Public-Private Sector Stakeholders –Strengths and Weaknesses

Strengths include high convening capacity by the national government, favouring the alignment of the whole sector, availability of top quality public and private databases and sources to be drawn on to gain a better knowledge of the sector, Spain boasts a wide-ranging supply of university and occupational tourism training

Weaknesses include legislation does not lay down the best possible competitiveness framework for developing tourism businesses, the knowledge supply is not structured to meet the needs of sector demand, tourism-knowledge generation and operation centres working with a piecemeal vision and little input of added value, the tourism sector is not perceived as a prestigious sector to work in or

do business with, the training and research supply has not been properly tailored to meet the needs of the tourism sector

### **Key Strategies/Priorities**

#### Objectives for Destination Spain

- Boost tourism activity and profitability
- Generate quality employment
- Encourage market unity
- Improve the international ranking
- Enhance the cohesion and renown of the Spain brand
- Favour public-private sector co-responsibility
- Work towards the deseasonalisation of tourism

These will be accompanied by 3 instruments

- Boosting knowledge, entrepreneurship and training
- Improve the tourism supply
- Diversify demand

#### Measures

##### Strength of the Spain brand

- Coordinated development of the Spain brand
- Promotion of the strategic marketing plan
- Permanent EU representation of Spain's tourism interests

##### Focus on Clients

- Launching of a Customer Loyalty Programme
- Promoting a campaign to stimulate national tourism demand
- Modulation of airport fees
- Streamlining the tourism visa process

##### Supply-side and Destinations

- Support for the repositioning of mature destinations
- Credit facilities for renewing tourism infrastructure
- Support for tourism municipalities
- Smart destinations: innovation in destination management
- Networks of customer experience management agencies
- Standardisation of the rating and categorisation of hotels, rural accommodation and campsites

- Evolution of the Spanish tourism quality system
- Bringing out the importance of Spain's cultural and natural heritage, wine and cuisine

#### Alignment of public-private sector partnerships

- Analysis of the impact of all draft legislation on the tourism sector
- Promoting market unity
- Amendment of the legislation affecting tourism
- Bringing the private sector in to Tourism Spain's decision making and financing processes
- Support for the internationalisation of Spanish tourism firms
- Single window for innovative companies and entrepreneurs

#### Knowledge

- Drawing up the Tourism Spain service catalogue
- Reorganisation and modernisation of the Departments of Spanish Tourism abroad or Spanish tourism offices
- Reorientation of national tourism statistics

#### Talent and Entrepreneurship

- Credit facilities for young tourism entrepreneurs
- Innovative tourism entrepreneurs programme
- Bringing training in to line with business demand

#### Prioritisation Methodology of Measures

Two prioritisation criteria have been defined, namely ease of implementation and the impact of each measure, characterised in turn by a series of sub criteria

### **Philippines: The Philippine National Tourism development plan**

Drafted 2011

Period 2011 to 2016

Government led

#### **General Comments/Background**

The plan calls for total investment of P265 billion

The funds will be split between government and allocated to build roads and airports

Targeting 10 million international and 35.5 million domestic tourists by 2016

The plan cuts the country up in to 20 clusters, 9 of which have been identified as priority clusters for investment and development based on the identification of secondary gateways as premier entry points to these areas.

## Key Strategies/ Priorities

- Rapidly expand capacity of secondary international airports, this includes reducing congestion to improve visitor's impression, increase passenger handling capacities
- Expand connectivity between Philippines and its key growth markets, this includes renegotiating air service agreements with key growth market countries, reduce air international air operations cost in the Philippines and simplify border formalities/ procedures for key growth markets
- Implement a strategic access infrastructure program between secondary international airports and strategic destinations, this includes improving, rehabilitating and expanding 23 domestic airports, improve, rehabilitate and expand 21 seaports and improve, rehabilitate and upgrade 28 strategic connecting roads with total distance of approximately 850 kms
- Implement a sustainable tourism destination infrastructure program, this includes provision of water and water treatment, design and construction of tourism information centres and support infrastructure
- Develop diversified tourism products that engage local communities, this includes developing major mixed-use tourism complexes in the vicinity of international Airports
- Implement a PPP-based mandatory tourism enterprise accreditation system and facilitate tourism investment and lower business costs. This includes design and implementation of PPP-based mandatory tourism enterprise accreditation system
- Safeguarding natural and cultural heritage and vulnerable groups. This includes developing uniquely Filipino destinations and products and increasing numbers of heritage sites for international recognition
- Develop a competent well motivated and productive tourism workforce, this includes skills capability building, improving labour relations
- Improve governance in the area of safety, security, and in dealing with tourists

Obstacles to the attainment of attainment of the plan goals and targets include uncompetitive tourist destinations and products, limited flights and seat capacities including the poor quality and limited capacity of international and domestic transportation and infrastructure destination, along with other restrictions that have limited market access; and weak public sector tourism governance and human resources development policies and practices

To overcome the challenges the strategic directions and programs that will be undertaken in the plan are:

- The development and marketing of competitive tourist products and destinations
- Improvement of market access
- Connectivity
- Destination infrastructure
- Improvement of tourism institutional, governance and industry manpower capabilities

Strategic Vision: "To become the must experience destination in Asia"

## South Africa

Drafted 2011

Period 2011 to 2016

Government led

### Key Strategies/Priorities

Tourism growth and the economy

- To grow the tourism sector's absolute contribution to the economy
- To provide excellent people development and decent work within the tourism sector
- To increase domestic tourism's contribution to the tourism economy
- To contribute to the regional tourism economy

Visitor experience and brand

- To deliver world class visitor experience
- To entrench a tourism culture among South Africans
- To position South Africa as a globally recognised tourism destination brand

Sustainability and good governance

- To achieve transformation within the tourism sector
- To address the issue of geographic, seasonal and rural spread
- To promote 'responsible tourism' practices within the sector
- To unlock tourism economic development at a provincial and local government level

### Implementation

#### *Cluster Actions*

A programmatic approach should be used to implement the various action plans. Each plan's high level actions are divided into main actions, which should be seriously considered in the implementation of the NTSS, as well as sub-action, which are possible steps or ideas on how the main actions may be implemented. The sub-actions will be further refined in the programme development phase, by the responsible entities, as required for implementation

Cluster 1: Policy, Strategy, Regulations, Governance and Monitoring and Evaluation

- Research, Information and Knowledge Management
- Policy and legislative framework
- Collaborative partnerships
- Prioritising tourism at national, provincial and local government level

Cluster 2.1: Tourism growth and development –demand

- Marketing and brand management
- Domestic tourism
- Regional tourism
- Business and events tourism

#### Cluster 2.2: Tourism growth and development –supply

- Relevant capacity building
- Niche-product development and rural tourism
- Product information
- Responsible tourism
- Investment promotion
- Quality Assurance

#### Cluster 3: People Development

- Transformation
- Decent work
- Service excellence
- Community beneficiation

#### Cluster 4: Enablers of growth

- General tourism awareness among South Africans
- Safety and security
- International and regional airlift
- Ground transportation
- Domestic airlift

#### Key Investment Areas

- Niche tourism development
- Tourism Export development and promotion
- Airline pricing structure investigation

#### Strategy Risk Factors

- Global currency exchange rates
- Global economic downturn
- Macro-economic policy
- International or national tourism e.g. terrorism
- Natural disasters and climate change
- Breakdown in multilateral approach to global governance matters
- Political unrest/ civic strife
- Dependence on foreign tourists
- Crime
- Incidence of intolerance

- Spread of diseases
- Incoherent policies
- Lack of organisational structure (national/provinces and local government)
- Poor stakeholder relations and management

## Finland

- Drafted 2011
- Period 2011 to 2020
- Government led

### General Comments/Background

This strategy replaces its predecessor drawn up in 2006.

### Four Good Reasons for Promoting the Development of Tourist Industries

- Tourism is an industry with remarkable multiplicative effects on the national economy.
- Tourism is an industry with an intense employment effect
- Tourism brings prosperity and wellbeing to regions
- Tourism has growth potential

There is an analysis of Finland's strengths and weaknesses as a tourist country

Tourism industry trends include fragmentation of customer groups, emphasis on environmental awareness and the increasing significance of the internet

Quantitative goals include share of GDP, government tax revenues, number of jobs in tourism industries, tourism receipts

### Key Strategies/Priorities

Tourism strategy measures include 3 sets of mutually complementary measures: internal development of the sector, enhancing Finland's image as a tourist destination and general industrial policy base.

#### *Goals*

- Strengthening of tourism clusters and networks
- Supporting the growth and development of enterprises in the home market and internationally
- Attention to sustainable development in tourism business processes and the supply of services
- Development of education in the tourism industry and enhancement of competencies

- Improving the infrastructure of tourism areas
- Better utilisation of research and market data
- Strengthening tourism marketing
- Enhancing Finland's international visibility
- Development of taxation
- Environmentally responsible energy use
- Supranational discriminatory legislation
- Improving accessibility
- Promoting railway traffic
- Promoting year round activity (seasonality)

### **Tourism Scotland: The future of our industry, in our hands**

- Drafted 2011
- Period 2011 to 2020
- Government led

### **General Comments/Background**

Recent years have seen Scotland's tourism industry maintain its position as a key contributor to the nation's economy, generating an annual visitor spend of 4.5 billion pounds.

Measuring success through overnight visitor spend, visitor satisfaction, overnight visitor numbers and length of stay, average spend per night per visitor, day spend and numbers

### **Key Strategies/Priorities**

- Knowing our markets
- Managing the customer journey
- Building sustainable tourism
- Strengthening leadership and collaboration
- Better data

### **Implementation**

Growth ambition is a dynamic indicator, review of progress annually, tracking updated Tourism Economics forecasts, industry performance data and progress against their action plan.

After 3 years when a better understanding of the economic situation is developing and will be in a position to have new actions underway with clearer indications of their likely impact, a more fundamental review will be carried out.

## Brazil: 2007 to 2010 National Tourism Plan A journey towards inclusion

- Drafted 2007
- Period 2007 to 2010
- Government led

### General Comments/Background

#### *Vision*

Tourism in Brazil will always bear in mind regional diversity and create markedly Brazilian products, allowing the domestic market to expand and positioning Brazil on the world tourist scenario. The creation of jobs and occupations, income generation and distribution, the reduction of social and regional inequalities, promotion of equal opportunities, respect for the environment, protection of our historical and cultural heritage and generation of foreign exchange are some of the horizons to be attained by the program's strategic actions

### Key Strategies/Priorities

#### *Goals*

- Reach 217 million trips in the domestic market
- Create 1.7 million new jobs and occupations
- Bring 65 tourist destinations up to international quality standards
- Generate 7.7 billion dollars in foreign exchange

#### *Macro-Programs and Programs*

- Planning and management
- Tourism information and studies
- Transportation logistics (e.g. air connectivity, strengthen domestic airlines, improve the network and the quality of passenger infrastructure for the various transport modes serving tourist regions)
- Tourism regionalisation
- Supporting the private sector e.g. stimulating companies access to credit, attract investors for projects, disseminate investment opportunities in tourism, sensitizing potential investors to tourist development opportunities in Brazil
- Public infrastructure e.g. generate conditions for the creation of tourist facilities, increase the benefits derived from tourist development, facilitate the access of tourists, including those with special needs, guarantee adequate conditions for tourism to develop in a sustainable manner

- Improvement of tourist facilities and services e.g. promote the quality of tourism products in Brazil, promote the qualification and improvement of agents operating throughout the tourism productive chain
- Promotion and support for commercialisation e.g. bolster the domestic market, promoting a large number of quality products, promote Brazilian regions, at home and abroad by means of cultural and natural diversity, contributing to the reduction of regional inequalities, increase the flow of foreign tourists to Brazil, by intense promotion in major international markets, strengthen the segment of business tourism, events and incentives

### **China: The outline for National Tourism and Leisure (2013 to 2020)**

- Drafted 2013
- Period 2013 to 2020
- Government led

#### **General Comments/Background**

The outline is developed on the basis of ‘the opinion of the State Council on speeding up the development of the tourism industry to meet the people’s growing needs in tourism and leisure, promote the healthy development of the tourism and leisure industry, and build a Chinese-style national tourism and leisure system.

#### **Key Strategies/Priorities**

- Sufficient time for national tourism and leisure
- Better environment for national tourism and leisure e.g. pricing structures for museums
- Improved infrastructure for national tourism and leisure
- Product development and activity organisation plan of national tourism and leisure e.g. products to meet diverse needs
- Enhanced service quality in national tourism and leisure e.g. improve the supervisory system on the safety, order and quality of tourism and leisure activities, and enhance the quality guarantee system of national tourism and leisure

#### **Implementation**

- Strong leadership and organisation i.e. development and reform commissions and tourism departments are responsible for the organisation, coordination and supervision in implementation of this outline
- Sound planning and guidance i.e. national tourism and leisure should be incorporated into economic and social development plans at all levels as well as into development plans of relevant industries and departments
- Vigorous policy support i.e. gradually increase financial input into public service infrastructure for tourism and leisure. Non-governmental sectors will be encouraged to invest in tourism and leisure facilities, and develop distinctive tourism tours and high-quality tourism and leisure products.

- Strong supervision and regulation i.e. Local governments, according to this outline should strengthen tourism market regulation and step up comprehensive law enforcement to ensure laws, regulations and standards related to tourism and leisure are effectively enforced

### Turkey: Tourism Strategy 2023

- Drafted 2007
- Period 2007 to 2020
- Government led

### Key Strategies/Priorities

- To contribute to the objective of sustainable development by eliminating the interregional differences in levels of development
- To help increase the competitiveness of the tourism sector through creation of regional tourism brands rather than relying on cheaper products
- To reconsider and plan the existing tourism sites within a sustainability perspective and thus create high quality, viable environments
- To support the social and economic objectives of central government and tourism development
- To support tourism development with sustainable environmental policies
- To strengthen international cooperation
- To harmonise sectorial development policies and targets with those of national development schemes
- To closely trace global trends and demands and build up plans and conduct practices accordingly
- To develop tourism within a multi-functional approach, by focusing on destinations
- To extend the season the year by diversifying tourism products
- To promote tourism and raise awareness in public, private companies and NGOs especially on ecotourism, plateau and agricultural tourism
- To make both domestic and international promotions and marketing efforts effective
- To ensure integration of various types of tourism specific to region or locality, thus establish tourism cities with focus on alternative tourism (health, thermal, golf, winter sports....) capable of offering an ample variety of tourism facilities, along with such utilities as health, education etc...
- To create tourism products based on tourist profile
- To use tourism as an effective tool for fostering social and economic development of backward regions and disadvantaged groups
- To alleviate the burden on public by encouraging active involvement of private sector enterprises in tourism infrastructure and transportation projects
- To ensure that appropriate governance mechanisms are used, in which central and local government and civil actors can collaborate and cooperate in decision-making processes concerning tourism

- To ensure coordination between central and local governments and integral treatment of managerial organisation and means of financing, within an integral planning approach when drafting down plans on tourism
- To enhance labour quality with instructional courses on tourism and to enforce the effective operation of a sector specific certification system
- Helping infrastructure related and environmental problems occurring at locations where tourism activities get denser be solved with joint efforts and contribution of local governments and private sector enterprises
- To provide full support for extraordinary accommodation facilities brought into tourists' service, by conserving the regional architectural assets

*Strategies for Strengthening the tourism industry*

**Planning** –To exhibit a planning approach that supports growth, is physically applicable and socially oriented and fairly reflects the principle of sustainable tourism

**Investment**- To boost tourism investments by designing incentive schemes that would make tourism investment projects economically feasible and viable

**Organisation** –To achieve institutionalisation through councils to be established at national, regional, provincial and local levels within the context of good governance, to ensure full and active participation of tourism sector as well as all related public and private entities and NGOs in relevant decision-making processes

**Domestic Tourism**-To provide alternative tourism products based on acceptable quality and affordable prices to various groups in society

**Research and Development**-To ensure top prioritisation of R&D efforts in tourism industry among public and private sector and tourism organisations

**Transportation and Infrastructure Strategy** –To eliminate transportation and infrastructure problems of densely populated and fastest growing tourism centres

**Marketing and Promotion Strategy** –To commence with marketing and promotion activities at each destination, in addition to the national marketing and promotion campaigns with the ultimate objective of branding on a national, regional and local scale

**Educational Strategy**- To set up and introduce an education program in tourism, which would yield measurable outcomes

**Strategy of Service Quality**-To activate total Quality Management in every constituent of the travel industry

**Strategy of City Branding** –Manage branding of cities rich of cultural and natural heritage and thereby convert them into a point of attraction for travellers

**Strategy of Tourism Diversification** –To develop means for alternative tourism types led particularly by health, thermal, winter, golf, sea tourism, ecotourism and plateau tourism, conference and expo tourism activities

**Regions to Host Rehabilitation Efforts for Tourism Areas** –To make arrangements for handling in the first place and strengthening the infrastructure of areas where mass tourism activities grow intense and for extending tourism season throughout the entire year in regions

**Tourism Development Zones**-To use tourism as a key tool for local and regional development in tourism development areas encompassing more than one city to be transformed in to destinations

**Tourism Development Corridors**-To develop a certain route for tourism on definite themes, by rehabilitating historical and natural texture e.g. winter corridor, Black Sea Coastal corridor

**Tourism Cities** –To plan tourism settlements capable of competing against the world by becoming a global brand

**Ecotourism Zones** –To develop nature tourism with reference to development plans

### **Implementation**

In order for the Tourism Strategy of Turkey -2023 to be realised with all its dimensions in integrity and so that it can reach its objectives, it is important that public institutions and organisations, the business world and non-governmental organisations as well as the whole public adopt the strategy and act harmoniously according to the common objectives set out

Outlines the different organisations and their roles in implementing the strategy

#### *Action Planning*

An intensive preparatory phase has to be fulfilled before the targets can be attained and the best economic and social benefits retrieved in the shortest possible time

The individual actions have been broken down on schedule, according their implementation priority and expected returns on the timeline. The prioritisation of actions took due account of tourism product diversification and countrywide tourism activity concerns

#### *Monitoring and Evaluation*

The criteria of measurement developed for monitoring the performance of Tourism Strategy of Turkey -2023 and how successfully the targets are attained will be among the basic tools used by enforcers and decision-makers to get involved and proceed with the transformation process. At this extent, a national Tourism Database repository and a National Tourism Certification Service shall be formed and put into action.

Throughout the process monitoring phase, which has critical importance for the overall success of the strategy, the outcomes of updates measured according to predefined indicators will be subject to regular comparative analyses with preset targets and objectives

The National Tourism Database Repository Service will organise data transmitted by various public and private sector entities and then submit its conclusions with opinions to Ministry of Culture and Tourism and the National Tourism Council. Later, the service and council will get together to set measures required to be taken in line with the conclusions and opinions submitted, making necessary amendments in the strategy accordingly.

## Sweden: National Tourism Strategy (based on presentation)

- Drafted ??
- Period ??
- Industry led

### General Comments/Background

Traditional Top-down planning and decision making is increasingly viewed as being unresponsive to changes in the market place, is not efficient enough when it comes to realising the competitive potential of private enterprises, is based on the belief that tourism can be controlled and predictable, is ineffective in stimulating innovation and entrepreneurship and poses difficulties in measuring macro and micro level return on investment

#### *Challenges with a Top-Down Approach*

- Most tourism plans do not work because tourism is too complex for the deterministic model
- Failure to create or facilitate new tourist experiences
- Tourism actors conduct business in isolation, avoiding cooperative strategies
- Does not encourage identification of new target markets

### Key Strategies/Priorities

#### *Three Focus Areas*

Destination development and themes, offensive marketing and sales and coordinated tourism industry

#### *Four Strategic Goals*

Increase number of international visitors, develop several new and support present destinations, increase economic impact, increase number of domestic visitors

#### *Six Strategies*

World-class destination development, financing, private-public partnerships, target marketing, entrepreneurship, business enterprise and competence, green and sustainable tourism development

### Implementation: A Bottom Up Approach

It is not so much a program as a philosophy

Whatever the existing framework for tourism policy, planning and development, a more bottom-up approach can be implemented to some degree

The following principles should be adopted for application in Sweden:

- Liberate innovation
- Emergent Strategy

- More support for entrepreneurs and small business
- Develop globally competitive clusters e.g. healthy lifestyle cluster
- Encourage product clubs
- More focus on special interest segments and experiences
- User based innovation and co-creation of experiences e.g. food tourism
- Special events e.g. encourage and support special-event initiatives
- More targeted communications
- More emphasis on local and regional DMOs
- Increased role for research –innovation will require focused and timely research, innovation depends on learning systems being in place and partnerships between researchers, industry networks and DMOs must be strengthened
- New roles for the State e.g. invest in innovation, stakeholder planning, more private-public sector partnerships, infrastructure investment

### **Fiji: Strategic Planning at a National Level (based on presentation)**

- Drafted ??
- Period ??
- Government led

#### **General Comments/Background**

In 2012 the tourism sector contributed F\$2.5 billion to the Fijian economy. This is forecast to increase to F\$3.9 billion in 2022. Tourism in Fiji contributes around 38% of GDP to the Fijian economy.

The tourism development plan in Fiji is intended to improve Fiji's asset base in concert with the marketing plan that focuses on increasing visitor numbers

The first National Tourism Plan in Fiji was implemented in 1973. The list below under each previous plan illustrates factors that have impacted the achievements of the plans.

1973 Plan	1989 Plan	1998 Plan	2007 Plan
<ul style="list-style-type: none"> <li>▪ It failed to anticipate developments in aircraft technology</li> <li>▪ It did not incorporate development at Pacific Harbour and Denarau Island</li> <li>▪ 1987 Coup</li> <li>▪ Withdrawal of Continental Airlines from Fiji in 1987</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ecotourism Policy and Strategy for Fiji (grant)</li> <li>▪ Devaluation of Fijian dollar</li> <li>▪ Introduction of Air Pacific service to Tokyo saw an increase in visitor arrivals from Japan</li> <li>▪ 1990 Gulf war</li> <li>▪ Withdrawal of Canadian Airlines in 1991</li> <li>▪ Introduction of Value Added Tax</li> </ul>	<ul style="list-style-type: none"> <li>▪ 2000 Coup</li> <li>▪ 2002: new policy that requires visitors to reapply for visitors permit after 1 months stay</li> <li>▪ 2003: F\$11 million was allocated for the development of tourism infrastructure – National budget</li> <li>▪ F\$13 million as marketing grant to the Fiji Visitors (Tourism Fiji)</li> <li>▪ Devaluation of the Fijian dollar</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing Plan rather than a development Plan</li> <li>• Too ambitious</li> <li>• Devaluation of the Fijian dollar</li> <li>• F\$23.5 million marketing grant to Tourism Fiji</li> <li>• F\$3 million operating grant</li> <li>• Restructure of i-Taukei Land Trust Board</li> <li>• Development in infrastructure to meet visitor expectation</li> <li>• Tax incentives</li> </ul>

Ministry of Public Enterprises, Communications, Civil Aviation & Tourism

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### Key Strategies/Priorities

- Infrastructure –land/air and sea
- Transport linkages
- Investment incentives
- Budgetary allocation
- Land issues and customary rights
- New and revised legislations

### Indicators and Benchmarking

- Visitor Arrivals
- Average length of stay
- Visitor spend

### Implementation

#### Key learning's from previous plans

- Tourism development plan to have more realistic timeline
- No mechanisms for effective review of the plan
- No integration of key determinants development plans
- More focus on development needed rather than marketing

### *New Direction*

- Establish a practical time line -5 years rather than 10 years
- Establish a mechanism for an effective annual review of the plan
- Integrate and align with projected development strategies for infrastructure and other key determinants
- Identify geographic areas with potential tourism value and provide methods to develop tourism in such areas

### **Cook Islands: A Geotourism Strategy/ Tourism Master Plan**

- Drafted 2005
- Period 2015
- Government led

### **General Comments/Background**

The goal of tourism planning in the Cook Islands since the George Ellis-led Aitutaki Tourism Task force in 1994 has been to generate “sustainable growth in tourism in a manner that is economically viable, socially acceptable and environmentally sound”. The Aitutaki report identified ten barriers to achieving this goal, these included accommodation standards, growth limits (in terms of fragile ecosystems), constraints on local ownership, lack of environmental awareness and protection, lack of understanding of the tourism economy, lack of motivation, threats to cultural integrity, need for training/expertise.

### **Key Strategies/Priorities**

The goal for the new tourism plan is to develop tourism that sustains and enhances the well-being of resident Cook Islanders and their environment, society, economy and culture.

### *Overarching*

- Protect and enhance the Cook Islands environment
- Enhance the tourism industry’s economic viability
- Protect and enhance the tangible and intangible indigenous culture
- Implement national and Island tourism plans in an efficient, cost-effective and sustainable manner

### *The more detailed initiatives*

- Tourism training and employment opportunities for residents
- Community tourism projects
- Resident Cook Islanders understand and value the tourism industry
- Tourism industry operates in an environmentally sustainable manner

- Outstanding natural resources are protected and public access secured
- The Cook Islands are effectively marketed as a geotourism destination
- Review and revise branding, positioning and imaging
- Develop an integrated approach to overseas promotions and events by the industry and culture groups
- Air services enhanced in terms of connections and frequency
- Encourage provision of adequate regional air services
- An extended range of geotourism products
- Encourage the further development of yachting
- Expand cruise tourism on a selective basis
- Establish industry benchmarking scheme to assist the industry to monitor performance and profitability
- Visitor safety and security is maintained
- Infrastructure on each of the islands meets the needs of the tourism industry
- Effective use of information technology
- Revise and reintroduce the visitor satisfaction survey
- Research supports the on-going development of the industry
- Culture and heritage appreciated for their intrinsic value
- Planning, environment, legislation and regulation are aligned with geotourism approach
- Budgetary provisions for Island Councils to support community tourism initiatives and maintain adequate infrastructure

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