



Tourism 2020

Spanish Tourism Plan Horizon2020



ETC / UNWTO

Joint International Seminar on

Tourism Forecasting and
Strategic Planning

Friday, September 12th, 2008

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THE 2020 VISION INTRODUCES NEW CHALLENGES TO THE SPANISH TOURISM SYSTEM

- 1 Improve the methodologies and support tools for **tourism planning** and the translation thereof to town and country planning.
- 2 **Develop, modernizing and specialising the most important products** in order to keep and improve the business value.
- 3 **Bring the design, development and marketing of the tourism products** of the new emerging destinations into line with latest trends.
- 4 **Bring the management and the marketing systems of tourism firms** into line with the needs of the new scenario.
- 5 **Up the profile in far-off markets and value segments** in European markets.

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THE 2020 VISION INTRODUCES NEW CHALLENGES TO THE SPANISH TOURISM SYSTEM

- 6 Establish a **strategy for securing the loyalty** of current demand, especially of the Spanish.
- 7 Solve the **seasonal lopsidedness** of tourism flows.
- 8 Adapt the **human resources management model** to attract and retain the best talent.
- 9 Improve **competitiveness**, in employment, education, productivity and R+D+i in tourism.

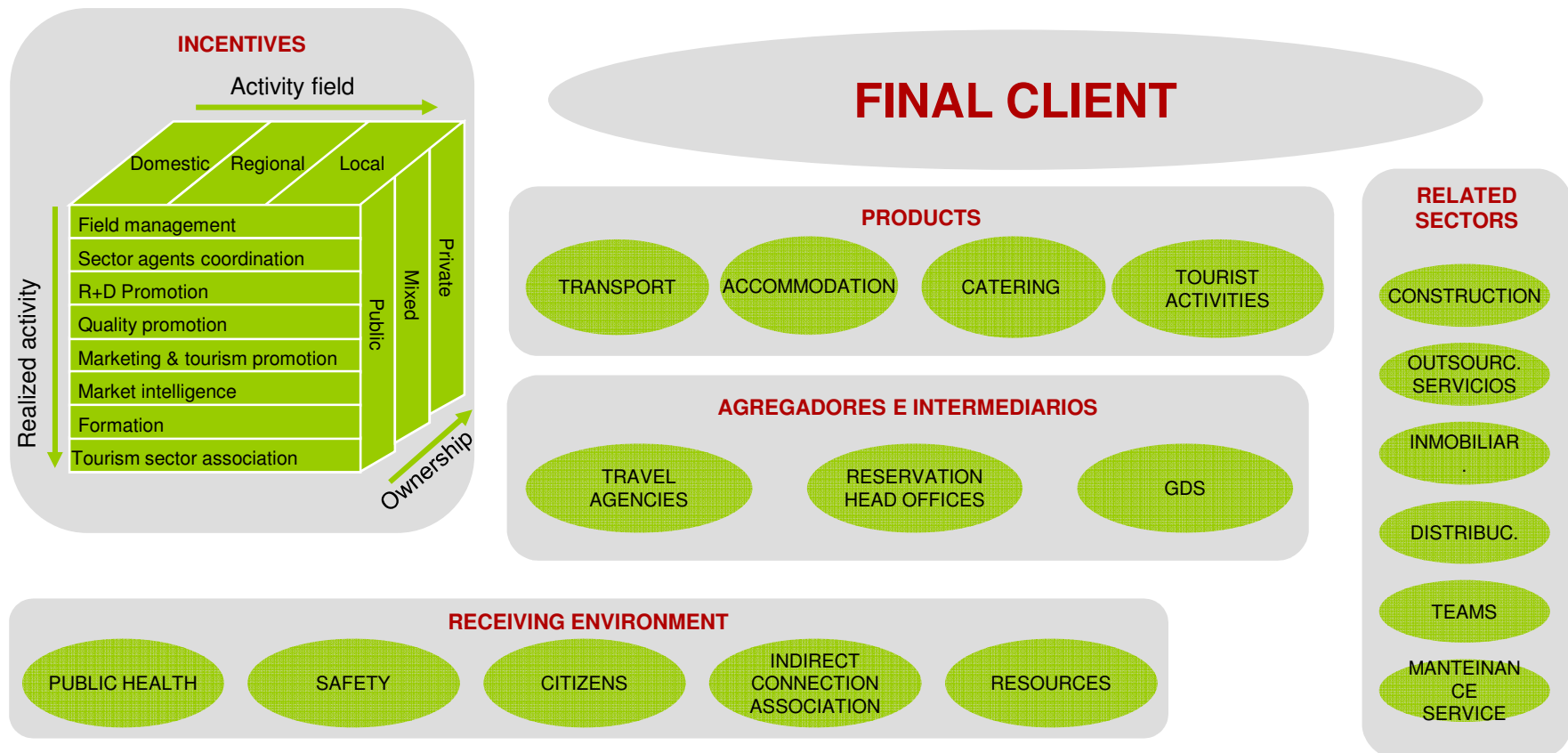
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WITH A NEW WAY OF WORKING IN AND FOR THE SECTOR

Agents Map of the Spanish Tourist System



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Clients Environment

- **25.000 surveys** to international tourists (HABITUR)
- **6 depth interviews to the most important tour operators**
- High Market Research Studies from TURESPAÑA

Social Environment

- **2 Focus Groups** in representative Spanish tourism destinations
- **1.000 surveys** made on the web Turismo 2020
- Active presence in the forum of the web Turismo 2020

Expert Environment

- **35 experts** (professionals, academicians, businessmen, trade unionists) in 7 groups of work
- **25 work encounters**
- **5 coordination meetings**

Business and professional Environment

- **Meetings and encounters with the main trade agents**
- **6 presentations in cities with the participation of more than 1.600 trade agents (public and private sector) and social agents**
- **Round tables**
- **2.200 depth surveys to professionals and tourist agents**
- **Web Turismo2020**

Public Environment

- **Tourism Sectoral Conference**
- **Inter-ministerial Tourism Committee**

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OUR GOAL IS

Make the Spanish tourism system the most competitive and sustainable by 2020, contributing the maximum level of social well-being

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FROM A NEW STRATEGIC

The best policy is the one arising from a broad consensus at the destinations; each region has to build up and decide on a strategy for its own tourism development.

Containing and renewing the supply for the long-standing destinations and selective planning of tourism development in emerging destinations are the key of the new outlook



Is it possible to find a shared outlook in which all tourism destinations come out winning by 2020.

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AN OUTLOOK FROM NEW PRINCIPLES

- ✓ Market centred **planning**
- ✓ Striking the right **balance** between the tourism sector and its environment
- ✓ **Differentiation** on the strength of their own particular traits and attributes
- ✓ Product **specialisation** in line with demand trends
- ✓ **Simplification** to stimulate the development and continuous improvement of tourism firms
- ✓ Permanent **commitment and cooperation** between the stakeholders of the tourism system

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The different programmes and action lines come from from the approaches and proposals discussed during the development of the Tourism Plan 2020

- Develop the **new economy** advantages in tourism
- Improve the **value** for the client
- Assure **sustainability** of the tourism model
- Improve **competitiveness**
- Promote a new **shared leadership** of the tourism system

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TOURISM 2020 STRATEGIES



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STRATEGY: **KNOWLEDGE**

Improving the quality in the decision-making process in the Spanish Tourism System, based on more information and knowledge of the sector's actuality and the destinations, competitors, marketing and the market and its segments.

- Networking: knowledge management
- Increase the knowledge to new areas
- Improve the decision-making processes and the definition of policies
- Whole projects: administration-training centres- companies

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STRATEGY: **INNOVATION**

Make a competitive advantage from the application of the new technologies, due to capacity of developing value for the client, develop new links with the market, improve the sector's efficiency and reduce the environmental impact.

- Admit the need of innovation
- National R+D+ I Plan
- Transverse networks, learn from others
- New models of relations with the market, create a value for the client
- Improvement of the efficiency in the sector

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STRATEGY:

ATTRACTING TALENT

Boost people like the different element of the Spanish Tourism System, promoting the change in the human resources management model and the ability of attracting, developing and retaining talent, in all the organization levels and in the different services and management fields.

- Better practices in the human resources management
- Proposal of an effective education and constant qualification of the employers
- A better perception of the tourism industry by the society
- Attraction and qualification of entrepreneurs

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STRATEGY: **EXPERIENTIAL SPAIN**

Adapt the portfolio of products offered by Spain to the new requests and opportunities that the market offers, enriching and reinforcing the competitiveness of the present tourist products, promoting tourist experiences.

- A split-screen view of the market from a segmentation strategy
- Enrich the present products: models of specialization to obtain top products in an international level
- Design and product management and high potential experiences
- New product lines of high experiential value, peculiar content and emotional value

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STRATEGY: **POSITIONING 2020**

Reposition tourism in its own right for the creation of value with a view to 2020, doing so by means of the combination of common attributes and other differential advantages of clients and products.

- Emphasize the variety and the resources offered
- Design of brand architecture that favours the differentiation of the different products and destinations
- Actions of impact on new target tourism markets and segments
- Involvement from the promotion agents to the experiences generators

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STRATEGY: **MARKETING SUPPORT**

Adapt the sale function to the new market scenery, dominated by the demand and new technologies, developing solids marketing processes that answer to the requirements of each market and segments, and to the established aims for each tourist product.

- Strengthen abilities and knowledge about new models of business management, channels and trends
- Take advantage of the relation with the present clients, promoting the use of the ICT's
- Specific plans for each objective segment: intelligent market, planning and evaluation of a high professional value
- Special attention to the product aggregators different and peculiar experiences
- New models of public-private collaboration

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STRATEGY: **QUALITY PERCEIVED**

Emphasize the distinctive of the quality level, in service, equipment and infrastructures, offered by the Spanish Tourism System regarding our competitors, transferring the service and detail culture to all the participants in the chain of sectorial value, keeping the international leadership in efficiency.

- Attention to detail culture, emotional magnitude of the service, relationship with the customer.
- Involve everyone in the success of the satisfied client.
- Spread and generalization of the quality management, excellent combination of value and effectiveness
- Stimulate singular elements and improve the appearance of destinations

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STRATEGY:

TOURISM, ENVIRONMENT AND SOCIETY

Encourage the assumption of commitments to sustainability, to obtain a balance between tourism, environment and society, and the setting of internationally important and eye-catching examples in entrepreneurial activities and coastal, cultural, architectural and natural destinations.

- Know the effects caused, protect the landscape
- Improve the nature and cultural quality's environment
- Involve everyone: civil services, businessmen, society and tourists, to have a higher balance.
- Demonstration projects in an international level
- Social responsibility of Tourism

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STRATEGY:

PLANNING AND MANAGEMENT OF TOURISM DESTINATIONS

Promote tourism-destination management and planning processes based on public-private co-responsibility and social participation, capable of integrating and developing a strategic vision.

- Evaluate the competitiveness-sustainability of destinations
- Reinforce the strategic planning of the destinations
- Extend the destinations life cycle, in reference to an appropriate combination of differentiation and specialisation
- Promote public-private destination management models

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STRATEGY:

REVAMPING OF MATURE TOURISM DESTINATIONS

Promote a new model for mature tourist destinations characterised by a greater concern for value to the client, with higher profits and greater social and environmental benefits.

- Establish restructuring and revamping models of mature destinations
- Integral actions of demonstration effect in an international level
- Take effect over the basis of the future tourist models
- Support special projects and improvements in the supply agents

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STRATEGY:

DESEASONALISATION AND A MORE EVEN SPREAD OF TOURISM ACTIVITIES THROUGHOUT THE REGIONS PROGRAMME

Promote the diversity and range Spanish tourist offer, in order to increase the deseasonalisation levels and a more even spread of tourism activities throughout the regions, having as reference the needed product and tourist destination specialization and distinction, and a better connection between territories.

- Value resources, values and attractiveness with international potential
- Connection of the tourism territory
- Develop new offers and deseasonalised products
- Specialization and distinction of products and destinations

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STRATEGY:

LEGISLATIVE FRAMEWORK AND SIMPLIFICATION

Promote a legislative framework to boost the competitiveness of the Spanish tourism system, favour entrepreneurial initiative and innovation and simplify administrative processes that impinge on entrepreneurial decision taking.

- Benefit consensus in the legislative framework to make the business competitiveness easier
- Promote the enterprising spirit
- Simplification of the administrative area where the tourism companies carry out their activity
- Coordination in the Sectorial Tourism Conference and between the tourism authorities and the other authorities

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STRATEGY: **COOPERATIVE CULTURE**

Boost the directive function of tourism, cooperation between the different levels of government and private participation in the definition and implementation of public policies affecting tourism.

- Cooperation between public administrations and private sector
- Tourism leadership in public politics
- International tourist cooperation in order to make our companies the global competition easier
- Innovate in public-private management models

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STRATEGY:

SECTORAL COMPETITION PLANS PROGRAMME

Promote sectoral competitiveness plans to improve business efficiency and efficacy through alliances, collaboration agreements and business management platforms.

- Promote Horizon 2020 strategies in tourism sub-sectors
- New tools and knowledge for the adaptation to the New Economy
- Promotion of alliances, collaboration agreements and business management platforms
- Reinforce innovation strategies

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STRATEGY: **TOURISM ACCESSIBILITY**

Facilitate the access, mobility and communications with clients, upgrading the transport, technological and service infrastructure for tourism purposes.

- Radial, intermodal and sustainable transport
- Encourage more widespread use of an access to quality communications networks
- Adjustment in order to answer to the new trends and demand.
- Improve the accessibility of tourists with reduced mobility or handicap

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STRATEGY:

SHARED LEADERSHIP

Promote a new shared leadership of the Spanish tourism system based on the watchwords of commitment, efficiency and co-responsibility in the carrying out of common actions, with the aim of raising the sector's awareness of the socio-economic benefits of tourism.

- Multilateral participation: institutions, entrepreneurs and society
- Contributions from all those interested
- Evaluation and observance of the advances and benefits
- Shared leadership from the planning to the implementation

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Plan 0812

A plan to dynamize the *change*

With innovative projects to show the demonstration effect

With international renown for the tourism sector

Based on the creation of *alliances*

Contributing with knowledge, technology and value for the sector agents

Adding the cooperative culture to obtain results

Working from the *excellence management*

Objectives planning

ESTIMATED INVESTMENT: 5.157.947.346€

- General Tourism Secretariat: 1.760.951.259 €
- Another Ministries, Autonomous Regions, local entities and private sector: 3.396.996.087 €

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TOURISM 2020		
	Planning 2008	Projection 2008-2012
NEW TOURIST ECONOMY	20.074.880 €	110.926.384 €
CUSTOMER VALUE	86.684.930 €	478.988.958 €
SOSTENIBILITY OF THE MODEL	214.035.180 €	1.167.436.173 €
COMPETITIVE ENVIRONMENT	453.160 €	2.494.617 €
SHARED LEADERSHIP	200.000 €	1.105.126 €
TOTAL BUDGET SGT	321.448.150 €	1.760.951.259 €

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**HOW CAN WE BEGINN TO APPLY
THE TOURISM PLAN 2020?**

10 MOTORS OF THE CHANGE

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Advance in the differentiation and specialization

1.- Training plan and sensibilización de gran alcance: the attention to detail culture

- Detail culture and hospitality promotion, development of tourism destinations
- An action with strong impact: more than 500.000 professionals and 10.000 technicians and managers

Prestige of this strategy, transmit the value of tourism
08-12: 31.910.520 €

2.- Competitiveness destination plans: specialization to compete

- The better benefits in an international level for a fixed category of product
- Creation of new products and routes
- Integral acts: tangibles (equipments, infrastructures,...) and intangibles (service, image, relationship with the customer)

New collaboration public-private models
Multiplicative effect
08-12: 349.498.201 €

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Add the tourist companies to the new economy

3. Tourism in the R+D+i National Plan

- E-Business Tourism Plan
- Support to the Tourism Clusters (Innovation)
- Training “Avanza” – Tourism

Exclusive lines for the tourist innovation

08-12: 74.687.889 €

4. Intelligence and tourism innovation network

- Design from an “architecture to participate”

A reference network for the generation and knowledge exchange

08-12: 41.290.501

5. Simplification of the framework of the law

- Group of work of the Sectorial Conference

**Elimination, mitigation or simplification of requirements
in administrative processes**

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Overall strategic vision of the tourist sustainability

6. Tourism Ministry – Environment Ministry Agreement

- Revamping of sun and beach destinations: higher added value, environment recovery
- Projects in special destinations: Nature Parks and Biosphere Reserves
- Integration to the Climate Change strategy: sustainability indicators
- Cooperation Network about “ Tourism and Sustainability” in Spain

7. Three models of reference and demonstration effect

- Palma’s Beach, Western Costa del Sol, San Bartolomé de Tirajana
- Top international destinations
- Change the present reality with a forward-looking approach
- Initiative and together-commitment of the administrations and sectors

Join effort from both Ministries and its budgetary resources
08-12: 3.600.000.000 €

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Promote a new model of relationship between the market and the customer

8. Product Club: Privilege Spain products with a singular content and emotional value

- The first eight “experiential itineraries ” made to measure
- Creación de producto y promoción en los mercados

With the participation of the autonomous regions, local entities and companies
08-12: 28.733.283 €

9. Tourism 2.0: New presence of the Spanish tourism in Internet

www.spain.info

- An intelligent web site adapted to every kind of tourist
- New tools and formats of image projection
- Add tourists like active internet users: 2.0.

An action for more than 25 million internet users
08-12: 42.475.528 €



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Reinforce our tourist brand

10. Impact and notoriety communication action: 25 years of Miró's logo

- Reinforce our brand in the traditional markets, appreciate the fidelity
- Remark new associated values (variety, hospitality, emotions...)
- Impact in new markets (Asia)

In collaboration with the destinations and the most important

Spanish brands

08-12: 331.487.039

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CHALLENGES OF THE SPANISH TOURISM PRODUCTS

- Seaside Resort Tourism
- Cultural and City Tourism
- Meetings, Incentives and Exhibitions (MICE) Tourism
- Sports-Based Tourism:
 - Golf Tourism
 - Yachting Tourism
 - Skiing and Mountaineering Tourism
 - Health and Wellness Tourism
 - Rural and Active Tourism

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CONCLUSIONS AND TRENDS (I)

- The increase in international competition, born from economic globalisation and the deregulation of the markets, which might create a problem of overcapacity in certain segments.
- The new types of clients in long-standing markets and the opportunities for drawing in new clients in the new markets.
- The environmental trends, with an agenda of political and economic measures to offset, mitigate and adapt to the climate change.
- Technological developments, which will determine not only the form of marketing tourism but also the makeup of the products themselves.

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CONCLUSIONS AND TRENDS (II)

The Spanish and European commitment to growth based on knowledge, innovation, improvement of the productivity and sustainability of the economy will set up a new reference framework for the sector. The value-creation culture needs to be fully integrated into its own transformation, giving it the chance of making a definitive contribution to economic modernisation and social well-being.

In short, tourism is a mainstay of Spain's economic and social development. It needs to renew its growth patterns to ensure and maximise its contribution to social well-being, leading the new tourism era defined by technological change, environmental responsibility and the demands of the new society.

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Plan del Turismo Español Horizonte 2020

