Annex 4.A1. International learning models: Attractiveness and promotion

The purpose of presenting international learning models in the review of tourism issues and policies in Italy is to provide inspiration for the Italian stakeholders in implementing reforms in tourism.

The Spanish model illustrates the co-management of international tourism promotion among the central government and autonomous administrations.

Spain: Management of international tourism promotion among the central government and autonomous administrations

Description of the approach

Spanish regions have the competence to define and develop tourism policies. The central administration is responsible for foreign tourism promotion and for the co-ordination of tourism policy planning. The plans that have been drawn to co-ordinate public tourism policies among different administrations are:

- Framework Plan for Spanish Tourism Competitiveness FUTURES 1992-1995 - recognised the strategic role of tourism in the Spanish economy
- Framework Plan for Spanish Tourism Competitiveness FUTURES 1996-1999 - improved tourism sector competitiveness
- Comprehensive Integral Plan for Spanish Tourism Quality 2000-2006 - focused on quality instead of competitiveness
- Tourism Plan 2020 - is an important effort to help the tourism sector become more sustainable and knowledge based, and to develop a new competitiveness model

In relation to foreign tourism promotion, the central government created the Spanish Tourism Institute (Turespaña). It is responsible for:

- planning and developing Spanish tourism promotion in external markets
- supporting the commercialisation of tourist products abroad
- co-operating with Spanish regional governments, municipalities and private sector in the promotion and commercialisation of their products

At the end of 2004, Turespaña defined its strategic plan called "The Plan of Objectives for Foreign Tourism Promotion", which focused on increasing tourist expenditure in Spanish tourism destinations and products, developing tourism activities in new geographical areas, generating tourism activities outside the traditional summer and

Easter periods, fostering tourist services and infrastructure, and contributing to social and environmental development. It has five action areas:

- market research
  - definition of high research reports and other reports related to season, products and destinations
  - design of a specific website for the dissemination of promotional and commercial activities and different reports and tourism knowledge
  - in collaboration with regional administrations, training of experts in foreign tourism promotion and organisation of courses on tourism markets
- image and communication
  - development of co-operative campaigns to promote the Spanish tourism brand together with other regional brands and products
  - development of inter-regional tourism brands (Saint James Way, Pyrenees, Green Spain and World Heritage Cities)
  - development of image campaigns for products in co-operation with private sector and for destinations in collaboration with other public administrations (regions and municipalities)
- commercialisation and product development
  - creation of product clubs
  - commercialisation support in co-operation with travel agencies and tour operators
  - employment of new techniques to more effectively connect to final consumers
- online marketing
  - collaboration with SEGITTUR (Spanish Society for Tourist Information Management) to develop tools for information and tourism marketing
  - development of the Spain.info website and its adaptation to emerging countries
  - development of online promotion activities
- excellence management
  - preparation of periodic evaluation reports
  - definition of operative plans

Turespaña has 33 offices in different countries based in Spanish embassies that collaborate in the promotion campaigns.

Rationale for approach adopted

The tourism industry makes a significant contribution to the Spanish economy on the basis of its contribution to GDP and balance-of-payments, the number of tourism companies and the workforce employed. It is therefore important for the Spanish economy and the tourism sector to have a body which plans, promotes and supports commercialisation, and which co-ordinates different key agents of the Spanish tourism sector. This was the rationale for the creation of Turespaña. It is an instrument of tourism

policy, a support body for tourist destinations and product commercialisation, and an organisation to promote co-operation among different institutional levels and among public and private agents.

A system of co-ordination also exists in the form of the Sectoral Conference that meets at two levels. On one level, the general directors for tourism of the regional governments meet with the general manager of Turespaña; and on another level, the *consejeros* (Regional Ministry) of tourism meet with the Secretary of State[2]. The *Consejo Español de Turismo* (Spanish Council of Tourism) also exists and is composed of the *consejeros* of tourism, the Secretary of State and representatives of the sector. Likewise, there is an Inter-ministerial Commission of Tourism that groups all ministerial departments with influence on the topic.

The central government does not have any scope in national promotion of tourism, which is an exclusive competence of the autonomous communities. The competence for the international promotion of tourism is distributed between the central government, which promotes the national brand of Spain, and the autonomous communities, which is in charge of their own promotion. It is important to note that the autonomous communities have in total more funding than the central government, which has its own budget.

This demonstrates the incentive to co-ordinate both levels in the promotion of one single brand (Spain) designed in several ways (one for each autonomous community). The approach adopted by the central government was to demonstrate to regions the desire to collaborate on a voluntary basis. It is for this reason that Turespaña created the unique logo for international promotion.

This logo is based on the widely recognisable image created by the artist Miró more than 25 years ago, which was evaluated as a highly valuable asset by a consultant specialising in brand value. One part of all publicity material is reserved for this logo, leaving the remaining space for the use of the regions for their own purposes.

Besides facilitating the use of the logo, Turespaña pays half of the costs when the autonomous communities use the logo in their campaigns. The same approach was followed with private companies well known abroad (not only tourism companies). According to the State Secretary for Tourism, 21 agreements were reached in 2010 with regional institutions, and 200 with private companies.

Results of the approach

The following are some of the strategic plan's achievements (2005-2007):

- Global indicators for the period 2004 to 2007
  - Spain received 8.2 million more international visitors, indicating a growth rate of 16%
  - all main origin markets increased during this period
  - international tourist expenditure reached EUR 50 billion, indicating a growth rate of 14.1%
  - tourist average expenditure and daily expenditure increased

- Market research
  - seven reports about tourist policies in competitive countries
  - 16 reports of high research about origin markets
- Image and communication
  - 70-80% of the population objective was reached by means of publicity campaigns
  - 40% of external partners co-financed the promotion of tourism product
  - EUR 250 million of equivalent publicity value in printed press media (the initial objective was EUR 215 million)
  - Development and commercialisation
  - 31 000 agents were trained and 3 264 000 final customers received information about the product in order to improve the market share in the "sun and beach" segment
  - 9.1 million final customers were targeted with direct marketing initiatives in order to attract more international cultural tourists
  - 202 local campaigns promoting "product clubs" reached 3.5 million customers
  - 500 international meetings successfully attracted, improving Spanish congress tourism products and destinations
  - 5.2 million final customers received information on supra-regional products
- Marketing on line
  - 14.4 million visits to the website: *www.spain.info*
  - 18 co-operative agreements with regional administration
  - nine new product channels
- Excellence management
  - Partner satisfaction with Turespaña rated 4.5 out of possible 6
  - Increase of private sector participation with 4 500 participants attending seminars and meetings
  - 9 million visits in website: *www.tourspain.es*

Reasons for success

The programme succeeded due to the capacity of the central government and the regions to find a common interest in sharing one image and costs, while maintaining their own self-identity and autonomy.

Obstacles faced and response taken

The global economic crisis has affected the Spanish economy in general and tourism activity in particular. In 2009, Spain was the third largest tourist destination at international level with 52.2 million international tourists. But the evolution was negative, with 8.7% less international tourists than in 2008. This implies that the promotion actions are now more important than in the past.

During the process of developing the Tourism 2020 Plan, new priorities for foreign tourism promotion were defined in order to face new challenges in the operative plan of Turespaña. These priorities are related to innovation, sustainability, co-operative culture and international projects.

Relevance to other countries

There is a possibility of inter-institutional collaboration where there is a "win-win" game. It is the case of Spanish international promotion, where central and regional governments share the costs of maintaining each other's image.

While maintaining their own identities, the localities, regions and the state could specialise in one type of promotion, *e.g.* long versus short-distance markets, by sector – congress, professional, cultural, beach, golf.

It is also important to have a body (Sectoral Conference) where the different territorial levels meet and more so, if they work simultaneously at technical and political level.

Considerations for adoption in Italy

The co-ordination of international marketing campaigns is easier with one design which allows each region to maintain their specific identity while at the same time enables it to profit from the positive effect of one strong national brand.

This task will also be facilitated if the central government can co-finance the campaigns that use the national brand as image.

Box 4.A1 The tourism cluster in Madrid

At regional level, there is also the need to co-ordinate the different tourism initiatives. Regions, municipalities, associations and other actors develop different initiatives.

One example of collaboration could be found in Madrid, where a tourism cluster was created (*www.madridnetwork.org/red/turismo*). The object of the cluster is to promote co-operation among institutions and companies of different characteristics (hotels, transport, telecommunications, etc.), to facilitate new opportunities for businesses, and to improve competitiveness within the sector. Some of the projects that are being studied are the development of technology to process check-out by SMS, the automatic translation of restaurant menus in different languages, and the possibility of Madrid hosting the Ryder Cup.

At institutional level, the Town Hall of Madrid and the Government of the Community (region) of Madrid have their own tourist boards. While each one has its own budget and even different logos and corporate colours, they collaborate at technical level, although not always at political level. For instance, the long-haul origin market is worked exclusively by the Community while the market of congress tourism is dealt with by the Town Hall of Madrid.

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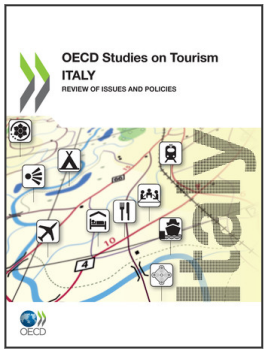
Notes

1. In 2006, approximately 370 institutions were either closed or not opened to the public (9% of the total).
2. The Secretary of State was changed to the General Secretary for Tourism in the last governmental reorganisation.



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