



Turismo2020
Plan del Turismo Español Horizonte 2020



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A METHODOLOGY DEFINED IN A THREE-PHASE PROCESS

- Analysis and diagnosis of the current Spanish tourism system.
- Identification of the main likely trends by 2020.
- Identification of key areas for improvement.



PHASE I: BASE DOCUMENT

A METHODOLOGY DEFINED IN A THREE-PHASE PROCESS

- Identification of ideas for improvement in the critical study areas.
- Maximum involvement and participation of tourism and social stakeholders.
- Drawing up the advance document of the Strategic Plan.



PHASE II: PARTICIPATION AND DEBATE

Client Environment

- 25,000 surveys of international tourists (HABITUR)
- 6 in-depth interviews of the main operators and market influencers
- High-level market research by TURESPAÑA

Social Environment

- Running 2 Focus Groups in representative destinations of Spanish tourism
- Nearly 1000 surveys conducted through the Turismo2020 website
- Active participation in website forums of Turismo2020

Expert Environment

- 35 experts (trade professionals, academics, businessmen and trade-union officials) grouped into 7 working groups
- 25 working sessions, 5 coordination meetings

Entrepreneur and Professional Environment

- Encounters and meetings with the main stakeholders of the sector
- 6 presentations in cities with the participation of over 1600 sector representatives (public and private) and social stakeholders
- Debate forums
- Over 2000 detailed surveys of trade professionals and tourism agents
- Web Turismo2020

Public Environment

- Tourism Sectorial Conference
- Inter-ministerial Tourism Committee

A METHODOLOGY DEFINED IN A THREE-PHASE PROCESS

- DRAWING UP THE PLAN
- APPROVAL BY THE SPANISH TOURISM BOARD AND SECTORAL CONFERENCE
- IMPLEMENTATION AND MONITORING



PHASE III: 2020 SPANISH TOURISM PLAN
AND 0812 PLAN

What is the goal in view?

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

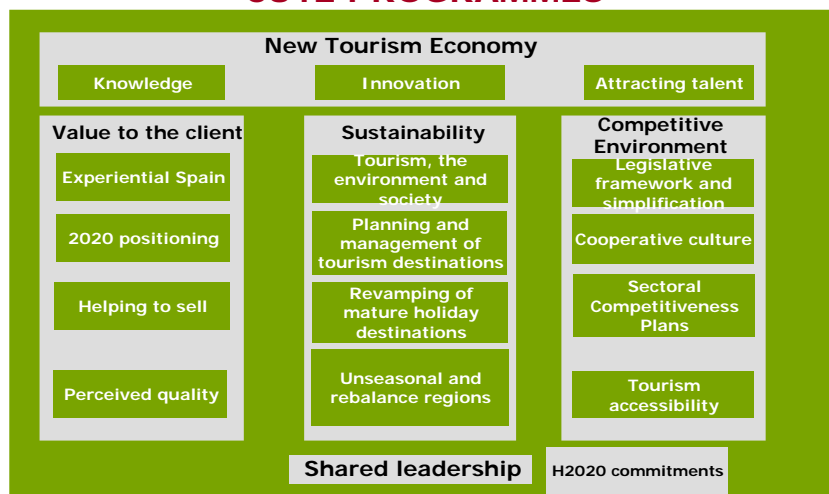


AN APPROACH BASED ON NEW PRINCIPLES

- **Planning** from a strategic viewpoint
- **Striking the right balance** between the tourism sector and its environment. Revamping the model
- **Differentiation** on the strength of the destination's unique traits
- **Specialisation** in product categories
- **Simplification** to incentivate development and improve company performance
- **Ongoing commitment and cooperation** among stakeholders



STRATEGIES OF 2020 TOURISM PLAN 0812 PROGRAMMES





1. New Tourism Economy

Tap into the new economy and fully exploit its advantages, making innovation, knowledge and the capture and development of talent the key strategic assets to ensure client satisfaction and business success.

KNOWLEDGE

- Develop a benchmark intelligence system for the Spanish tourism sector, opening up its access and bringing it to the widest possible notice.

INNOVATION

- Promote a new across-the-board innovation model for the system as a whole, improve the scientific and technological capacity and boost the effectiveness and efficiency of the management processes.

TALENT

- Attract, develop and retain talent within the tourism sector, providing a rewarding career structure and improving the leadership and people-management practices.



2. Value to the Client

Improve the value offered to the client, with tourism experiences that cannot be emulated elsewhere, underlining Spain's unique identity and position. Client relationship management and client satisfaction have to be made the new paradigm for the development, marketing and management of products.

EXPERIENTIAL SPAIN

- Develop "Experiential Spain" by generating tourism products of high value for the client, with widely recognized benchmarks based on the identity and singularity of destinations.

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.

TRANSFORMATION OF MANAGEMENT AND MARKETING

- Encourage the transformation of marketing processes by boosting the client relationship management, seeking permanent adaptation to the new environments and liaison arrangements created by the technologies, channels and trends.

PERCEIVED QUALITY

- Encourage attention to detail before, during and after the trip, thereby improving the service quality perceived by clients and their level of satisfaction.



3. Tourism Model Sustainability

Increase the sustainability of Spain's tourism model, optimising profit per unit of sustainable load capacity and investment, guaranteeing the quality of the natural and cultural environment of each spot, social well-being and integration and a more even spread of tourism activities throughout the regions.

TOURISM, ENVIRONMENT AND SOCIETY

- Encourage the assumption of commitments to sustainability and the setting of internationally important and eye-catching examples in entrepreneurial activities and coastal, cultural, architectural and natural destinations.

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.

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.

UNSEASONAL AND A MORE EFFICIENT DISTRIBUTION OF TOURISM ACTIVITIES TO THE REGIONS

- Bring to the fore those resources that favour a more even spread of tourism activities within the regions, creating new product categories capable of operating all year round, solving the seasonality of the demand.



4. Competitive Environment

Create the best environment for the creation and development of competitive and groundbreaking tourism businesses.

LEGISLATIVE FRAMEWORK AND SIMPLIFICATION

- Promoting the legislative framework most conducive to the competitiveness of the Spanish tourism system, favouring entrepreneurial initiative and innovation and simplifying administrative procedures that impinge on entrepreneurial decision taking.

COOPERATIVE CULTURE

- Boosting 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.

SECTORIAL COMPETITIVE PLANS

- Promoting sectorial competitive plans that improve business efficiency and efficacy by dint of alliances, collaboration agreements and business management platforms.

TOURISM ACCESSIBILITY

- Facilitating client access, mobility and communications, upgrading transport, technology and service infrastructure for tourism purposes.

Knowledge generation

Main thrust for the design of tourism policy



Sufficient and suitable information



Clear information



Accessible information



Information susceptible to forecasting and planning

Knowledge: action lines

CO1 **Tourism innovation and intelligence network**

Designing an online tourism innovation and intelligence system

Maximizing the access to and dissemination of the knowledge generated at the various government levels, companies, business associations and research centers and universities

Establishing a tourism knowledge transmission network and creating a climate of collaboration.



Creation of a powerful knowledge-management and tourism-innovation network

Knowledge: action lines

CO2 **New knowledge contents for 2020**

Helping to make intelligence a basic decision-making tool in the sector

Incorporating it into the service processes and products

Developing the knowledge in those spheres identified as conducive to this end in the Tourism 2020 project



Enlargement of the knowledge by improving the statistics system

Knowledge: action lines

CO3 **Giving priority to the different needs, based on the participation process**

Developing a public-private participation system to give priority to research needs

Pinpointing new needs and improvements to be made

Establishing efficient mechanisms of coordination and liaison between knowledge generators and users



Use of tourism knowledge and bringing it to wider notice



Knowledge: action lines

CO4 Information and documentation system of the national tourism authority

Implementing a knowledge system for broadcasting the information generated by the tourism authority

Internet-broadcast tourism documentation and information system following different editorial lines

CO5 International projection of Spanish tourism knowledge Network

Taking part into international forums through the knowledge Network

Promoting participation in research networks to help project Spain's tourism intelligence.



Consolidation of tourism knowledge as an international benchmark

