Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)

Tourism Product Development And Marketing Strategies In the COMCEC Member Countries

COMCEC COORDINATION OFFICE
September 2013

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INTRODUCTION

The Standing Committee for the Economic and Commercial Cooperation of the Organization of Islamic Cooperation (COMCEC) identified tourism as one of the six areas of cooperation (along with trade, transport and communications, agriculture, poverty alleviation, and finance) to achieve its vision "to build a prosperous Islamic Ummah based on solidarity and interdependence, enhanced mobility and good governance".

As a key development tool, the strategic objective set for tourism in the COMCEC Strategy[1] is: *Developing a sustainable and competitive tourism sector in the COMCEC Region*

Five Output Areas are specified in the tourism area for cooperation in the COMCEC Strategy: regulatory framework, capacity building and training program, private sector involvement, community-based tourism (CBT) programs, and marketing strategies.

Within the marketing strategies output area, COMCEC will support development of effective marketing strategies for raising awareness of the existing tourism destinations of the COMCEC Region through three specific outcomes:

- Diversified tourism products and destinations
- Utilized electronic media in promotional efforts to reach target groups rapidly and effectively (e-marketing, e-promotion)
- Promoted better image of the COMCEC Region

As a contribution to the fulfilment of these outcomes, the COMCEC Coordination Office contracted Tourism Development International (TDI) to conduct a program of research, analysis and assessment for a study *Tourism Product Development and Marketing Strategies in the COMCEC Member Countries*.

In preparing the Study, careful attention has been paid to the stated COMCEC missions:

- To produce and disseminate knowledge
- To share experiences and best practices
- To develop a common language and understanding
- To approximate policies

The principles established for the COMCEC Strategy are also followed in the analyses and recommendations put forward, namely:

- Enhancing mobility
- Strengthening solidarity
- Improving governance

Tourism is increasingly seen by all nations of the world as a significant tool for achieving economic growth and spreading socio-economic benefits to all parts of their populations.

[1] Making Cooperation Work COMCEC Strategy for Building an Interdependent Islamic World, COMCEC Coordination Office, October 2012.

Unfettered or misdirected tourism development can, however, cause negative consequences – on the destination's economy (through extensive leakages), environment (harming the biodiversity) and society (by undermining socio-cultural customs of the host population). The key to successful and sustainable tourism development is careful and integrated planning on a selective basis. The selection should be made on the basis of:

1. targeting the most productive markets and segments, and
2. providing the infrastructure, products and services to bring maximum benefit to the destination and fulfilment to the visiting tourist.

The process of tourism development necessitates official support for the sector since it involves a range of different agencies – typically government, at different levels, the private sector and the communities in which tourism takes place. Development needs to be coordinated and integrated so that all links in the chain fit and are in balance with each other. Creation of the conditions where appropriate tourism products are developed requires direction and management from government in the form of:

- Vision for the sector
- Development policy and plan – addressing the tourist development priority areas within the destination (the "where"), the types and scales of tourist product development (the "what" and "how much") and the phased timescale of development (the "when")
- Enabling strategies and support mechanisms to bring the plan to fruition (covering infrastructure needs, incentives and other investment inducements, human resource programs, marketing and promotion)
- A system of monitoring and adjustment since all tourism development plans need to be on a rolling, iterative basis, taking account of changing market conditions, technological developments and socio-political issues, to name but a few factors that are subject to rapid change

A multitude of books, academic articles, reports and studies have been produced based on research and analysis of tourism markets and segments, and how best to brand a destination, develop creative strategies, positioning and targeting to realise the opportunities identified from these assessments. The amount of effort put into tourism product development has historically been much less, being limited to the United Nations World Tourism Organization (UNWTO)/ European Travel Commission (ETC) *Handbook on Tourism Product Development*[2]. Yet, the two elements are inter-dependent: successful tourism development requires tourism products and services that are in line with market tastes and trends and that realise maximum benefits for the host destination. The process of *market: product matching* is vital in selecting the right types of tourism product; supported by marketing and promotional strategies and programs for the products developed that are of a scale and form (in terms of tools and methods of communication) that resonate with the target markets and segments, and spur them into action.

A destination cannot realise its full potential unless the range and quality of its tourism product offering meet the needs and expectations of tourists. Its tourism products are the

[2] Handbook on Tourism Product Development. UNWTO & ETC. 2011

foundation for a destination's tourism sector operation. Their attributes are communicated to the prospective customers through marketing communications. The identification of products to be developed and the ways these are marketed is based on the "market: product" matching principle. Market and product research is used to identify the potentially most productive features to be developed. Destination marketing then communicates these products to the marketplace. The destination cannot realise its optimal benefits from tourism without its attractions and facilities being actively and creatively marketed.

The Study is designed to lead from the elaboration of the key principles to guide and underpin tourism product development and the marketing strategies to support their implementation through to specific conclusions and recommendations applicable for the different categories of COMCEC Member Countries in the creation and marketing of successful tourism products.

Section 1 provides the framework for tourism product development and marketing. It provides:

- definitions of key terms;
- outlines of the variables influencing market demand and the types of products developed to match the market trends;
- explanations of the importance of planning for tourism development and the need for such planning to be comprehensive, consultative and coordinated, through appropriate institutional structures;
- details of the principles and procedures to be followed, and
- the steps in the process leading to a prioritised set of tourism product development opportunities and their marketing support.

Section 2 examines the global tourism marketplace. It identifies market trends and emerging changes in the types of product demanded by different markets and segments within those markets. It considers how countries around the world have built tourism development strategy into their overall socio-economic development framework, and examines the role of government in planning and facilitating tourism product development and destination marketing. In order to illustrate the process of successful tourism product development and marketing, a selection of seven case studies is given from countries at various stages of development and with varying tourism products.

In Section 3 the performance and characteristics of tourism in the COMCEC Region is examined and profiled. The systems and approaches used by the different categories of COMCEC Member Countries to tourism product development and marketing strategy formulation are outlined and assessed i.e. policies, legal and institutional arrangements. COMCEC Member Countries face a range of difficulties in developing tourism products that are both in line with market demand and are acceptable for the society of the host country. These are identified and discussed. Finally, assessment is made of the future opportunities and prospects for the COMCEC Region's tourism sectors achievable through strong product development and marketing.

Section 4 presents a series of case studies from the COMCEC Region examining successful examples across a wide range of facets, namely:

- Coordinated and comprehensive, long term planning,
- Rural, community-based tourism,
- Regional development within a country,
- Small-scale entrepreneurial support creating backward linkages to, and opportunities for, suppliers to tourism operators,
- Ecotourism development involving the private sector,
- Environmental protection integrated within the form and delivery of tourism product development, involving the coordination of multiple players,
- Product and market segment diversification,
- Value chain analysis creating backward linkages,
- Environmentally sensitive planning for large scale tourism development,
- Innovation in tourism product development, and
- Cooperation and coordination between different national and regional agencies in tourism product development

Section 5 contains a set of conclusions and recommendations to guide COMCEC Member Countries in their future tourism product development and marketing strategy. It is presented as an indicative guide for all countries to consider. Lessons from those COMCEC Member Countries that have achieved significant success – either as large scale destinations or on a smaller scale within selected communities – are outlined. Drawing on these examples, and in recognition of the fact that the COMCEC membership contains countries with differing socio-economic development policies and at significantly different stages in the tourism development process, a series of recommendations are presented separately for the developing and least developed countries in the COMCEC Region. These recommendations relate to three guiding principles of COMCEC's strategy of:

1. enhancing mobility (by using technological advances to facilitate the movement of tourists, and the exchange of knowledge about the development and management of the tourism sector, between countries),
2. strengthening solidarity (through capacity building and other forms of support between member countries), and
3. improving governance (by establishing institutional structures and procedures by which government can better plan for tourism product development, manage the sector, and market the destination).

The Study's principal conclusion is that there is both a pressing need, and opportunity, for fuller and closer collaboration between COMCEC Member Countries in developing a strong and growing tourism sector. This cooperation can lead to tourism products and services designed for the market realising high levels of benefit for the destinations through penetrative marketing strategies. The three areas where technical cooperation and capacity building between COMCEC Member Countries can most productively take place are: funding of tourism projects; technical assistance in the form of skills transfer, training and advisory services; and joint marketing and promotional campaigns.

1. CONCEPTUAL FRAMEWORK

1.1. DEFINING TOURISM PRODUCT DEVELOPMENT

At one extreme tourism product development can be defined as embracing all elements with which the visitor to a destination comes into contact. This includes infrastructure (e.g. transport, utilities) the service personnel, places of lodging, attractions and activities, facilities and amenities. At the more focussed level, tourism product development can be defined as comprising only those attractions, activities and facilities that are specifically provided for the visitor.

Individual attractions, activities and facilities are components of a destination's overall tourism product; only extremely rarely are they the sole item that tourist visitors experience or utilise when in the destination. A destination's tourism product is an amalgam of many different elements, the provision of, and access to, which the tourist expects to be fully in line with his or her needs. A destination's tourism product is, therefore, the lodging facility used, the places visited, the museums, parks, restaurants, shops and/or theatres patronised, as well as the journey to, from and around the destination.

A tourism product is comprised of three responses from the tourist:

1. *Experiential* – festivals, activities, community, event, dining and entertainment, shopping, safety, service
2. *Emotional* – human, cultural and historic resources, hospitality
3. *Physical* – infrastructure, natural resources, accommodation, restaurants, shops and other buildings visited[3]

The range of attractions and activities that falls under the umbrella term of 'tourism products' is extensive, covering natural features, history and cultural heritage, the built environment, and the people of the destination themselves. A natural feature such as a waterfall or reef, a demonstration of traditional music and dance, and a theme park all fall within the umbrella term of tourism products; as do activities such as tour excursions, mountain biking, sailing or participating in the preparation of a local dish or a traditional handicraft.

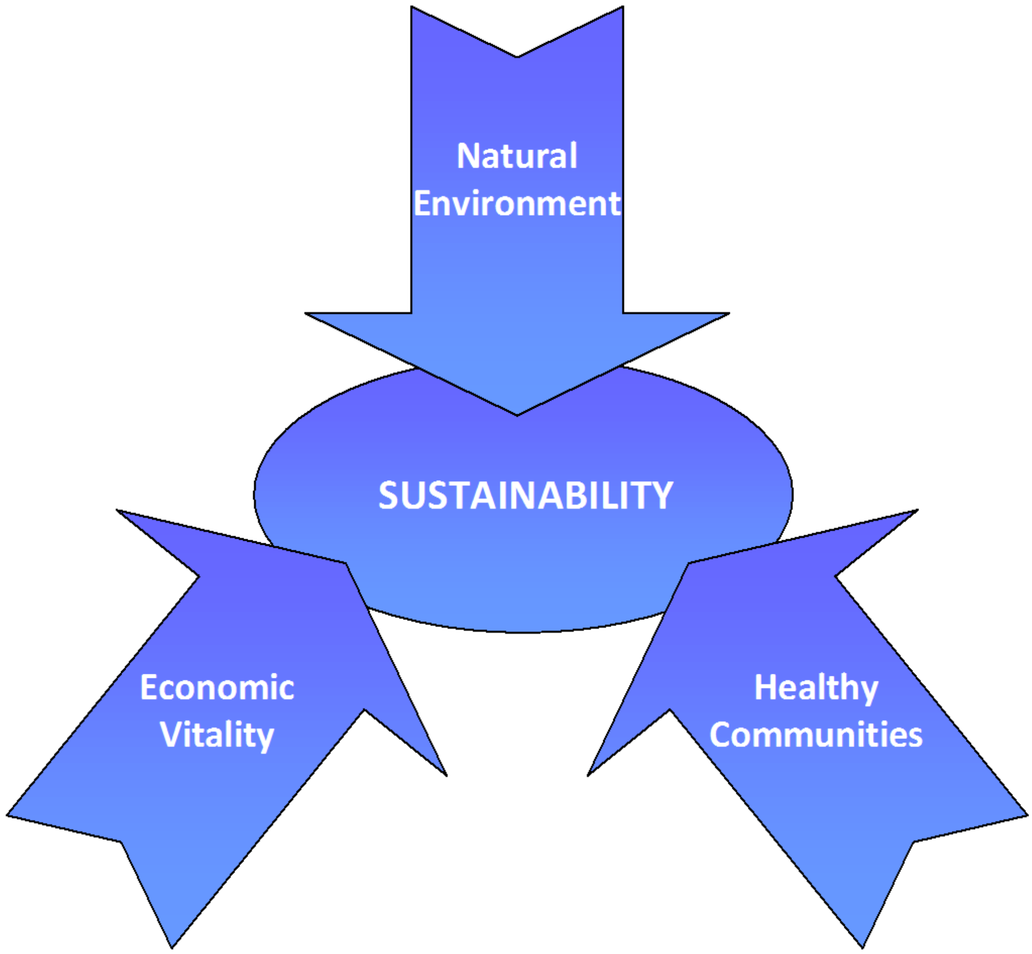
Demand for almost all such features comes, not just from foreign tourists, but also from the domestic market, and the needs and expectations of the different source markets and segments within those markets. What is important for destination authorities in supporting tourism product development is to understand what the levels, characteristics and impact of demand are likely to be from this multitude of market segments so as to be able to determine the appropriate policies and strategies to facilitate the creation of the most beneficial tourism product developments for the destination. The focus of this study is on tourism products which

[3] South African Tourism Planning Toolkit for Local Government, Department of Environmental Affairs and Tourism, 2009

governments can support that lead to the so-called 'triple bottom line' benefits of people, planet and profits thereby creating sustainable development (as illustrated in Figure 1.1).

The study defines tourism product development as the process by which the resources of a destination are shaped to meet the requirements of international and domestic customers. This covers everything from man-made facilities or attractions, to activities requiring varying levels of physical input, and organised events such as festivals and conferences.

Figure 1.1. Components of Sustainability



Source: Tourism Development International

Following the Cape Town Conference on Responsible Tourism in Destinations which resulted in the Cape Town Declaration, many destinations now focus on creating tourism products and experiences that meet the criteria for **responsible tourism** i.e. tourism which:

- minimizes negative social, economic and environmental impacts
- generates greater economic benefits for local people and enhances the well-being of host communities
- improves working conditions and access to the industry

- involves local people in decisions that affect their lives and life chances
- makes positive contributions to the conservation of natural and cultural heritage embracing diversity
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues
- provides access for physically challenged people
- is culturally sensitive, encourages respect between tourists and hosts, and builds local pride and confidence[4]

Destinations use various terms to describe tourism product development that seeks to care equally for the tourist, the host community and the environment of the destination. These include geotourism as well as sustainable and responsible tourism, while ecotourism is a form of sustainable tourism[5].

1.2. THE TOURISM DESTINATION, CHARACTERISTICS AND PLANNING CHALLENGES

1.2.1. CHARACTERISTICS OF TOURISM DESTINATIONS

Every destination differs in respect of its combination of natural resources, location vis-a-vis source markets, size and spread of population, history and cultural heritage, socio-economic and political systems, stage of development and levels of, and possibilities for, industrialization.

The tourism destination:

- is one product but also many
- involves many stakeholders with differing objectives and requirements,
- is both a physical entity and a socio-cultural one,
- is a mental concept for potential tourists,
- is subject to the influence of current events, natural disasters, terrorism, health scares, etc
- is subject to historical, real and fictitious events,
- is evaluated subjectively in terms of what represents value-for-money i.e. based on reality compared with expectations, and
- differs in size, physical attractions, infrastructure, benefits offered to visitors and degree of its own unique and authentic attributes.[6]

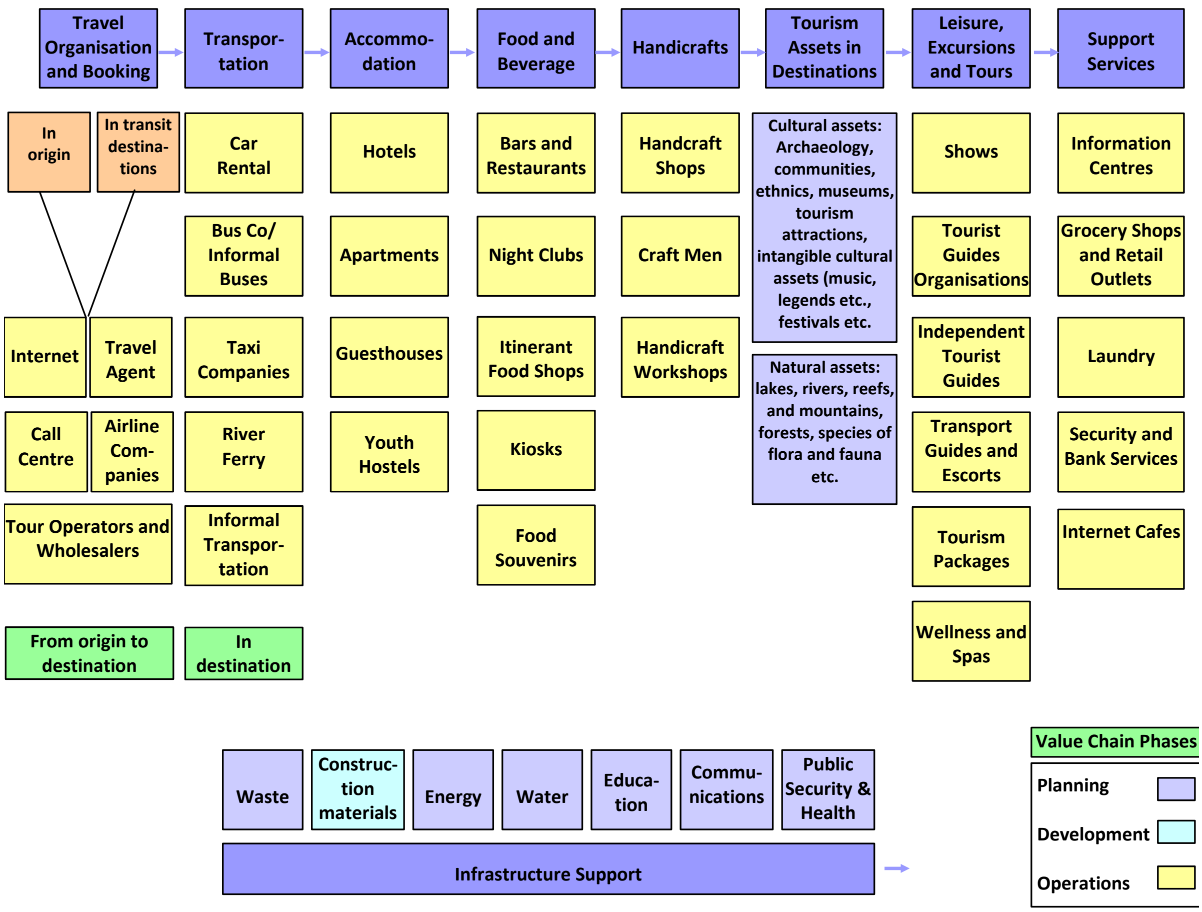
1.2.2. DESTINATION PLANNING AND MANAGEMENT CHALLENGES

The complexity of planning for, and managing, tourism in a destination is increased by the facts that:

[4] Cape Town Declaration, 2002
[5] http://www.sustainabletourism.net/definitions.html
[6] Handbook on Tourism Product Development. UNWTO & ETC. 2011

- The tourism product is a *combination of many different elements*, which are rarely provided by a single supplier,
- For the composite tourism product to be fully successful – both for the host destination and the visiting tourist – the different components *need to be complementary* since the overall performance of the destination's tourism sector can be determined by the weakest link in the tourist product chain. Ensuring this necessary balance in terms of standards between the different elements of the tourism product range can be an important role for government e.g. through regulatory standards, incentives.
- The operation of tourism products is constrained to a significant degree by *rigidity of supply*. This applies particularly to hotels, restaurants, shops, and other fixed site visitor attractions which are subject to *seasonal variations* in demand. Figure 1.2. below illustrate the complexities of the tourism industry. In addition to the entities directly involved, there are many other entities indirectly associated with tourism but whose involvement is nevertheless important to the success or otherwise of the destination.

Figure 1.2. – Tourism Value Chain (Entities Directly Involved)



Source: UNWTO

As well as those entities directly providing services for tourists, there are a large number of organisations, companies and individuals that are involved in meeting the needs of those in direct contact with tourists. These indirect suppliers can provide agricultural and fishery products, construction services, furniture and equipment supplies, handicrafts, engineering and other forms of maintenance, wholesale and retail operations, printing and stationery supplies, oil stations etc. Maximising the opportunities for local provision of these products and services is a primary goal of value chain analysis, identifying what are termed as **backward linkages**. The aim is that the growth of the tourism sector should lead to the growth of the industries that supply inputs to it.

Other challenges to be addressed in planning and managing destinations are as follows:

- The development of major tourism attractions and facilities are subject to *considerable lead times* i.e. from concept development to land acquisition, consultation, planning application and approval, feasibility study, financing, building and equipment, and staff recruitment and training.
- Tourism products are *perishable*, being fixed in time and space. An unfilled hotel room on any given day cannot be stored for sale on another day.
- Tourism destination products are *intangible* in that a visit to a destination comprises the sequence of “expectations” ahead of arrival, “experiences” while in the destination, and “memories” after the visit. There are few goods to show for the visit (except souvenirs) with photographs and videos serving as proxies of the trip.
- Discretionary purpose tourists exhibit a *high price elasticity of demand*, switching between destinations according to factors such as price levels in the destination and exchange rate variations.
- A tourist’s experiences in the destination begin at the point of arrival and continue until departure. All places visited and people encountered form parts of the visitor experience. The implications for the destination are twofold: first, to ensure that all personnel (including officials at airports etc) are fully trained and able to communicate in a positive way with visitors; and second, for individual operations to ensure that their *client mix is compatible* since “other tourists” form part of a tourist’s experience in the country.
- The great majority of tourists choose and make travel arrangements to visit a destination in their country of origin, using transport operators, tour operators, travel agents or online booking agents, most of whom have no tie or commitment to the destination. The *role of intermediaries* is, thus, considerable in influencing destination choice.

1.3. Variables Influencing Tourism Product Development

Where destination authorities seek to plan their tourism product development by “matching” their resources and assets to the trends and tastes in the range of source markets and segments, a systematic, building block approach can be most beneficial. As such all destination authorities will have established, as a minimum, the foundations for tourism product development, and have a broad understanding of what could be developed for touristic purposes and what their strategic product development and marketing priorities are. Nonetheless, there is merit in going through the following check list to ascertain if the directions being pursued are fully appropriate and to identify where gaps need to be addressed.

1.3.1. Influences And Determinants On Tourism Development

The starting point is to consider the various influences on, and determinants of, tourist demand, as identified in the UNWTO series of long range tourism forecasting studies published in the 1990s.[7] These reports classified four factors as the having continuing influence on tourism decade after decade i.e.

- **Economic** – the growth in tourism expenditure is greater than the overall rise in gross domestic product (GDP). A broad indicator that has proved reliable over the past two decades is that for each 1% growth in GDP there will be a rise of between 2 and 2.5% in discretionary travel spending.

- **Technological** – technological developments in transport revolutionised travel over the past 50 years and will continue to exercise a major influence with increasingly fuel efficient aircraft and motor vehicles, while electronic technology has given instant communications access to even the most remote destinations, with social media sites like TripAdvisor heavily influencing travel choices. Unless destinations fully embrace and utilise to the full all facets of electronic technology, they cannot realise their full potential and are likely to be outperformed by competitors.

- **Political** – barriers to travel have progressively been reduced over past decades through the withdrawal of visa requirements or their replacement by visa on arrival, and the use of technology-driven systems of personal check based on hand geometry or retina inspection will further facilitate and speed up frontier procedures.

- **Demographic** – changing demographic patterns such as the ageing of industrialised populations, the emergence of new family structures, and increased migration will all continue to have a positive impact on future travel volumes.

1.3.2. Other Factors Shaping Tourism Development

In addition to these fundamental influences, the UNWTO studies identify a further six influences that serve to shape the pattern, scale and forms of tourism development. These are:

- The opposite trends of *globalisation and localisation*, both of which can be positive for tourism. Large transnational organisations with economies of scale can offer good value-for-money for large scale tourism. Those consumers, on the other hand, who resist globalisation can provide opportunities and a focus for the development of tourist experiences related to a destination's cultural and natural resources on a smaller scale, often in the form of community-based tourism initiatives. Electronic

[7] Tourism to the Year 2000 and Beyond, UNWTO, 1991; Tourism 2020 Vision, UNWTO 1997

technology facilitates a blurring between these two extremes, with the large travel and tourism organisations able to offer customised experiences – a case of thinking global but acting local.

- Societies are exhibiting a *growing socio-environmental awareness* in their destination choice. Conscious of the impact that their and other tourists' activities have on the environments and people of the places they visit, and they are keen to minimise their carbon footprint and ensure that the population of the destination are treated well by tourism operators. This has led to a range of non-governmental organisations and ethical tourism advocacy groups such as Tourism Concern, the International Centre for Responsible Tourism.

- *Living and working environments* continue to become more stressful as a consequence of urban crowding and congestion, and the progressive loss of the traditional "job for life" allied to the corresponding rise of contract and part time work. The squeeze on free time manifests itself in respect of travel and tourism through shorter duration holidays.

- Society's progressive change to the *experience economy* necessitates businesses providing memorable events for their customers, and that memory itself becomes the product - the "experience". In travel and tourism, as consumers become more aware and informed about destinations and their cultures through electronic technology, so they expect tailor-made experiences designed for them in the locations they choose to visit.

- The *impact of marketing* on the types of products developed and destinations chosen is very high, reflecting the fact that most consumers make their decisions in their country of residence with limited information about the menu of destinations and products/experiences available. They are influenced by a range of information sources (e.g. family, friends and work colleagues) with experience of the destinations they are considering. Social media sites giving feedback on visits, the general and specialist media, the travel intermediaries and the paid marketing, promotion and public relations activities of destinations also influence destination choices. Marketing communications are being increasingly accurately targeted, focussing messages towards micro market segments and niches, and communicated more effectively.

- It is a truism to say that tourists will not travel to places where they fear for their *personal safety*. However, the incidence of deliberate harm to tourists is very small and the conservative travel advisory messages from tourist generating countries' governments can serve to create an excessive concern, or perception, about safety in many countries.

1.4. Fundamental Issues In Tourism Product Development And Marketing Planning

To be fully successful tourism development involves the state, the private sector and the location's community since, at its simplest, tourism represents a temporary increase of the population of the destination chosen. The implications are that:

- Planning for tourism is essential,
- The system of planning differs fundamentally from the planning of other economic sectors, and
- Tourism planning needs to be all-embracing, fully coordinated, undertaken over an extended time frame, and constantly monitored and adjusted on a rolling, iterative basis to take account of changing market conditions

The three primary stages necessary for destination authorities in establishing the framework for tourism product development are:

- *Institutional structures* for the planning, development, administration and marketing of tourism,
- A system of *coordination and integration* between all levels of government, and with other government agencies whose activities impinge in some way on tourism (e.g. transport, public works, education and training),
- *Planning system* and procedures that provide guidance but, through consultation, encourages innovation and stimulates investment.

In the first of the following three sub-sections, examination is made of the types of organisational models that are employed to plan for, coordinate the development of, and manage the tourism sector. The second sub-section focuses on the need for integration between the multiple public and private sector entities with a role in tourism.

The third sub-section outlines the reasons why planning for tourism requires a different approach to other economic sectors. It stresses the need for a planning approach that is comprehensive, fully coordinated, has a long term perspective but a short term action programme, and is subject to regular monitoring and adjustment, as required.

1.4.1. Institutional Structures

The complexity of tourism, and the extensive range of impacts it can have on the environment and people of a destination, is a major challenge for destinations in the early and growth stages of tourism development, or where tourism is a major component of the economy. In such cases, an official "hands off" approach leaving development of the sector to the private sector can be a significant risk. The great majority of destinations without a large and well-balanced economy where tourism plays a minor role, therefore, play a significant and central role in setting policy, strategy and support mechanisms for the development and operation of the tourism sector. Only three out of every five countries in the initial stages of tourism development have a dedicated tourism product development function within government[8].

[8] Handbook on Tourism Product Development. UNWTO & ETC. 2011

The challenge for governments is to establish an institutional structure that:

- incorporates all entities that have a role to play in facilitating tourism product development (i.e. various government departments responsible for transport, infrastructure, education and training, and private sector representatives), or are impacted by such developments (i.e. local communities), and
- facilitates new ventures that will benefit the destination but without creating a bureaucracy that stifles the emergence of innovative ideas and leads to lengthy procedural delays.

The complexity and cross-cutting nature of tourism creates the necessity for coordination, so destination authorities have to consider whether tourism institutional arrangements should be:

- Handled through a specialist, dedicated ministry or agency,
- Integrated as a department within another government ministry (e.g. transport, commerce, public works, culture and arts, environment) depending on the country's circumstances and priorities, or
- Incorporated as a part within all the other sectoral government ministries or departments.

There are difficulties whichever approach is taken. If tourism is not accorded specialist ministry status it tends to be treated as an insignificant sector by government policy makers and planners; but if it is a dedicated ministry or agency, the problem arises of coordinating the needs and impacts of the sector which fall within the responsibilities of other government ministries and departments.

In industrialized countries, tourism may well be a sector of significant scale and activity, but is frequently not part of the title of the government ministry or department responsible for policy and management of the sector e.g. tourism falls within the Ministry of Culture, Media and Sports in the UK, with the Minister responsible for the sector also handling sports.

Even in developing countries, tourism may be an important sector within the economy but, in many instances, does not always have its own dedicated ministry or department, typically being linked with other areas of responsibility.

There is no standard organisational model related to the process of tourism product development, with responsibility spread across different layers and levels of government, making the task of efficient and effective coordination vital but complex.

1.4.2. Coordination And Integration

Coordination for tourism is needed at both the *horizontal* (i.e. inter-sectoral between different government departments and agencies with responsibility for an aspect related to tourism) and *vertical* levels (i.e. between different levels of government – central, regional, local).

The means of achieving an effective system of delegated authority, communication and coordination between central, regional and local governments varies between countries, according to government structures and prevailing institutional arrangements. The guiding principle must be to avoid creating unwieldy bureaucratic structures while consulting widely with all stakeholders (including the private sector and communities) in developing plans and strategies for the country and the regions within it. The consultation process needs to ensure all parties are aware of the full range of impacts of various forms of tourism development, and to be representative of the divergent views about tourism development and marketing.

At inter-ministerial level, the two main means employed are a form of inter-departmental coordinating committee or, a combined public-private sector strategy or working group under the auspices of the ministry responsible for tourism to liaise and work with other government agencies on relevant issues.

1.4.3. Planning System

Tourism has a huge range of direct and indirect impacts, as well as creating the need for special facilities such as commercial lodging. This produces the prima facie case for government planning and regulation of the sector. Five key factors can be identified in respect of successful tourism planning:

1.4.3.1. Planning for the Tourism Sector is Vital

Tourism requires both specialist and general infrastructure, manpower with specific skills and destination marketing in tourist generating countries – the domain to a considerable extent of the *state*. It is an economic sector executed by the *private sector*. Tourist activity brings visitors into direct contact with the *host population*. With this triumvirate of destination interests, planning for the development and marketing of tourism is unlike that for any other economic sector and requires special systems, procedures and administrative arrangements.

1.4.3.2. Tourism Requires a Different Approach to Policy and Planning

The planning of tourism development requires incorporation of a wider range of factors than is the case for other economic sectors, including:

- the tourism system of demand, supply and distribution,
- the values (expressed in the form of needs, expectations and levels of tolerance), both of the destination community and of visitors,
- the relationships and inter-linkages between stakeholders in the three interest groups,
- the prevailing planning goals, parameters and regulations,
- the issues of scale (i.e. carrying capacity, thresholds), and
- the requirements for tourism development to meet sustainable development and other non-economic goals.

1.4.3.3. Tourism Development Planning Needs to be Fully Comprehensive and Coordinated

The interdependence of the different elements of the tourism product of which any visitor to a destination partakes necessitates all such elements to be incorporated within the tourism development planning system, since a destination will be judged by the weakest link in the tourism product offering. Furthermore investment for major facilities will be deterred if there are marked weaknesses in the other components of the tourism product since the development of features such as hotels are characterised by long lead times, high capital expenditure, and high upfront costs with only a gradual build up of demand producing a weak pattern of return on investment in the early years of operation.

1.4.3.4. Tourism Planning is a Long-Term Process

To provide the justification for major state investment in a major facility like an airport, and to give certainty to prospective private sector investors in large scale tourism product developments, tourism planning needs a long term time horizon. This can be difficult to achieve since two major players in tourism development (i.e. governments and private sector operators) look for short term returns. Governments' concern to be re-elected can lead to lukewarm support for a sector which shows the benefits in a decade's time or longer; while the operator's requirement for profits to satisfy its shareholders can make the long-term nature of many tourism product developments appear relatively unattractive. This can lead to situations where a short term planning approach has been adopted in a destination with detrimental consequences in the longer term right across the triple bottom line – economic returns, environmental and socio-cultural impacts.

1.4.3.5. Monitoring and Adjustment

There is a dichotomy in long term planning for tourism. While planning two decades ahead is necessary for certainty of investment, it has attendant risks because of the changing impact of the various influences on, and determinants of, tourism, as noted earlier. To resolve this difficulty, a phased planning approach with a progressive narrowing of the focus of the details is needed, along the lines of: a long term strategic vision, a three or five year development plan incorporating specific actions, budget and responsibility allocation, and a detailed one-year action plan.

This approach involves continuous monitoring to take account of changing market conditions and other developments in the many variables affecting tourism demand and supply. It permits evaluation and feedback at each stage with revisions and refinements possible that take account of changes in the marketplace and the factors influencing it. It enables envisaged directions in tourism development that are proving difficult to achieve to be stimulated through government support of one form or another (e.g. incentives, marketing investment); it enables adjustment to be made to the long term strategy to realise product development or market opportunities that had not been anticipated; and it enables destination authorities to focus on the most productive use of its budgetary allocation for destination marketing.

In summary, the necessary system of tourism planning is a rolling, iterative process. One-off plans can become quickly outdated, while plans for the short term do not lay the foundations for developments in the mid- and long-terms.

1.5. Principles And Procedures For Tourism Product Development

Nine principles can be identified that underpin all sound tourism product development.[9]

Figure 1.3 below summarises the specific purpose of each of the activities which are central in underpinning a sustainable approach to tourism development.

Figure 1.3 - Principles and Procedures of Tourism Product Development

Activity	Purpose
Market Research	Understand profile, characteristics, tasks and trends of markets and segments
Market: Product Matching	Identify products and services to be developed in line with market requirements
Tourism/Product Development Areas	Identify areas within the overall destination appropriate for specific types of product development
Stakeholder Consultation and Collaboration	Ensure the opinions and aspirations of all relevant stakeholders – local, national, international – are canvassed and taken due account of in the tourism product development plans prepared
Flagships/Hubs	Identify outstanding features within one or more tourism/product development areas where major products can be developed to constitute 'hubs' to attract tourists
Clusters, Circuits and Events	Create the 'spokes' fed through the 'hubs' by bundling together a range of attractions and activities, creating tourism routes, and organising festivals and events
Product Portfolio and Investment Plan	Formulate the various tourism product development opportunities into a cohesive and integrated development plan, and prepare and disseminate a product investment portfolio for prospective investors
Human Resource Development	Create vocational training and managerial educational programmes that produce the level and caliber of personnel needed by the planned tourism product developments
Marketing and Promotion	Feature the tourism product developments in the positioning of individual tourism development areas as part of the overall destination branding.

Source: Handbook on Tourism Product Development. UNWTO & ETC. 2011

Explanation of the significance and application of each of these nine principles is outlined in the following nine sub-sections.

[9] Handbook on Tourism Product Development. UNWTO & ETC. 2011

1.5.1. MARKET RESEARCH

Market research is the starting point for all tourism product development and the marketing cycle. It is the basis on which concepts are checked and translated into reality, and then supported through marketing and promotional action programmes. Understanding the tastes and trends in demand of tourists is one of the most fundamental requirements for successful destination tourism product development. Unless we understand what the visitor would like us to provide it is difficult to be sure that what we offer is acceptable and preferable to that available in other destinations. Then, once the product opportunities have been assessed and developed, a targeted marketing campaign converts the potential into demand.

1.5.2. MARKET: PRODUCT MATCHING

Products and markets are mirror images of each other. In this regard, the starting point in product development planning typically involves the preparation of a comprehensive assessment of the destination's overall political, economic, socio-cultural and technological – PEST – situation, and an audit/inventory of tourism resources and assets – natural, cultural and historical – and existing products. Combined with a SWOT analysis this enables a comprehensive analysis and understanding of the present situation to be developed.

In tourism, it can be argued that the role of marketing precedes the development of the product. The marketer gathers information regarding the expectations of the target market (the customers – both domestic and from the various international source regions), and the destination then uses such information to develop appropriate products.

1.5.3. TOURISM/PRODUCT DEVELOPMENT AREAS (TDAS/PDAS)

The establishment of a tourism development strategy related to an expanded range of tourism products can best be achieved through the designation of a system of tourism development areas (TDAs) based on separate and distinctive character zones. This approach has the benefit that it gives the destination authority and the ability to influence – even control - both the location and type of tourism development that takes place.

1.5.4. STAKEHOLDER CONSULTATION AND COLLABORATION

Following the identification of stakeholder groups in the areas for proposed tourism product developments, it is necessary initially to circulate information about the planning process and the role of consultation. A wide ranging programme of consultation with private sector and community groups will provide insights into the views, needs and aspirations in order to develop wide stakeholder consensus on the type and scale of tourism development in the location. With this information to hand, the tourism product development plan for the location can be finalised.

1.5.5. *FLAGSHIP AND HUB DEVELOPMENT*

A central component of a destination's differentiation is a flagship tourism attraction. Flagship tourism products are those with such strong market appeal that they determine the travel decision and choice of destination. Their role is therefore vital to destinations. Once a destination has a flagship attraction, all elements of the tourism sector can benefit.

1.5.6. *CLUSTERS, CIRCUITS AND EVENTS*

1.5.6.1. Cluster Development

Cluster development can take a number of forms:

- linked to a flagship on the 'hub and spoke' principle, as in the example of Greenville, South Carolina[10],
- a grouping of attractions and activities in a geographic area that is on a readily accessible route. If such features are not linked to a flagship, the number of them needs to be greater,
- a grouping of attractions and activities that are linked through a common theme or interest e.g. traditional rural lifestyle, cycling/camel safari trail/hiking trails.

1.5.6.2. Circuits, Routes and Trails

Circuit or trail development as a tourist attraction is not simply putting together a route based on the location of various features. There has to be a central linking theme or interest, and the route should provide distinct attractions and activities along it, with a range of facilities at key places along it. It is the integrated development based on a specific theme that makes the route attractive.

Trails can be long distance, developed at a multi-country level, where tourists experience a small section of it, through to relatively short routes within a country. An example of the former is The Silk Road, a 4,000 mile long interconnected network of trade routes across the Asian continent connecting East, South and Western Asia with the Mediterranean, as well as Northern Africa and Europe. UNWTO is working with national governments to raise the product offering along the routes and marketing the concept[11].

1.5.6.3. Events and Festivals

The organisation of events and festivals can meet a number of destination tourism sector objectives:

- offset seasonal imbalances by holding events in the shoulder and off seasons e.g. St. Patrick's Festival (Ireland) in March, Halloween Festival at the end of October – in places as varied as Pattaya (Thailand), Stratford-upon-Avon (England), Limoges (France), St. Matthews (Kentucky, USA) and at the various Disney theme parks,

[10] http://www.scprt.com/files/Tourism and Recreation Development/SC Volume 1 V4.pdf
[11] http://silkroad.unwto.org/en/publication/tourism-pearls-silk-road-0

- improving international perception and image of the country
- attracting visitor segments to whom the destination's other attractions do not appeal - open air popular music events are becoming a favoured means of drawing large audiences outside the main visitor seasons or to attract segments that might not otherwise consider visiting the destination. The Isle of Wight, a traditional British family seaside holiday destination, is a case in point[12].

1.5.7. Product Portfolio, Investment Plan and Funding

The government of a destination which places a strong emphasis on the economic contribution of the tourism sector should show proactive support for new product development through the preparation of a clear strategy, a product portfolio of opportunities, and an investment plan. Indeed without an investment plan, the preparatory work falls into the category of 'wishful thinking'.

1.5.8. Human Resource Development

Tourism requires specialist knowledge and skills. Any plan for the growth of an economic sector needs to ensure that the appropriate human resource capabilities are in place to realise such development without a major economic leakage in the form of expatriate labour and management. This involves creating educational and vocational skills training programmes either within the country, or in collaboration with neighbouring countries, or with countries with which destination has shared interests and social-cultural systems.

1.5.9. Marketing and Promotion

How a destination, or commercial tourism organisation, develops and promotes its products and/or services is a key factor in the realisation of developmental or economic/financial objectives. In an activity like tourism where the customer is "remote" from the place he/she is considering to visit, or from the tourism products and service available, marketing and promotion is a central component of tourism. It is a fundamental principle that the products developed should reflect the market's tastes and trends. It follows then that tourism product development is only half of the task of developing a successful tourism destination. Once developed, the products have to be brought to the attention of the market and presented in a way that stimulates interest, desire and action to purchase.

[12] www.isleofwightfestival.com

1.6. Steps in the Process

Once the overall priorities and policies for the tourism sector have been established, there are five steps to the process of establishing the best product development opportunities and bringing these successfully and sustainability to the market i.e.

1. establishing the present situation,
2. identifying the opportunities,
3. prioritising the tourism sector's objectives,
4. supporting the prioritised forms of product development through facilitation and marketing, and
5. ongoing management and coordination.

The importance and methods of application of this five-step process is examined in the following sub-sections.

1.6.1. Situation Analysis

It is important that destinations understand where they fit, and how they are perceived, in the international marketplace.

The first step is to establish their political and socio-economic pattern and stage of overall development since this will determine to a considerable extent the form and scale of tourism development that will be appropriate.

By auditing and critically evaluating the range and standard of infrastructure used by tourists, the existing facilities, attractions and activities offered to tourists, and the skilled manpower available, using a set of analytical tools, it will be possible for destinations to understand:

- what their competitive position is,
- where they are in the tourism area life cycle,
- whether their challenges are market-related or product-based, or both, and
- whether, and to what extent, efforts should be placed on marketing or product development.

1.6.2. Identifying the Opportunities

It is by the application of these strategic analytical planning tools that a destination can establish its competitive position and performance as a tourism destination, what the gaps (and future opportunities) are in its provision of tourist products and experiences, and the optimal product development and marketing directions to achieve sustainable development of its tourism sector.

A 'situation analysis' will not provide the level of detail required to make a decision on and move ahead with a specific tourism product development. The prima facie opportunities will need to be verified through a detailed examination of the market potential, profile and characteristics in order to assess the exact nature of the product that should be developed, and how it should be presented and marketed.

At the same time, it is important that product development ideas are acceptable to local communities in which they are planned (i.e. in respect of 'levels of acceptable change', and the extent and nature of benefits for them) and constitute a good 'fit' with the aspirations of private sector investors, developers and operators, and have the potential to produce a good level of return on investment and profits.

1.6.3. Priorities

Having moved from possible tourism product development opportunities to those that are compatible with the destination's triumvirate of stakeholders – government, private sector and community – it is then necessary to focus on those that are worthy of official development and marketing support.

The extent of government intervention varies between countries. At one extreme are many of the industrialised nations that have a policy of limited involvement, mainly through border controls, transport infrastructure, the regulation of travel and tourism enterprises, and some degree of destination marketing.

In sharp contrast are those destinations whose authorities pursue a policy of greater intervention in tourism through the encouragement and facilitation of, and support for, tourism development. This can typically be delivered through the provision of market data and trends information to the private sector, the establishment of human resource education and training programmes for hospitality and tourism personnel, the availability of fiscal and other incentives for product development, and destination marketing and promotional activities.

1.6.4. Facilitation and Marketing Support

Prospective investors - particularly for larger scale tourism developments - will call for clear and substantive official support before making their investments. As noted earlier the justification claimed is:

- the long development lead times,
- the high level of upfront capital costs,
- the gradual, rather than instant, growth of demand (and thus revenues producing adequate returns on investment and operating profits), and
- the influence of the many exogenous variables combined with intensifying competition that leads to investor uncertainty.

Five priority needs of prospective investors from destination authorities when considering a development have been identified in the *UNWTO/ETC Handbook on Tourism Product Development*. These are:

- willingness to share statistics and market research study findings that provide understanding of the destination's potential and market needs,
- a clear, established entry point – department and named individual - into the destination authority, with that access point acting as a 'one- stop' shop for all matters connected with the organisation's operations in the destination,
- openness to the private sector's views and opinions – and, in their own words, 'market knowledge and experience' – in both tourism product and market development strategies and initiatives,
- practical assistance to smooth the path between planning and implementation – not to waive or circumvent the planning application system but to expedite the approvals process, and
- provision of the necessary infrastructure, amenities and services to permit their operation to proceed smoothly e.g. traffic management and policing for an event or festival.[13]

The range of ways in which governments can encourage investment includes:

- grants and fiscal incentives,
- joint financing through public private partnerships (PPPs) for major projects,
- underwriting the new route development costs of transport,
- meeting part of the costs of an international tour operator's brochure featuring the destination,
- making financial contributions for the provision of facilities and amenities along tourism trails.

If, as noted earlier, tourism products should reflect the market's tastes and trends, tourism product development can be seen to be only half of the task of developing a successful tourism destination. Once developed, the products have to be brought to the attention of the market and presented in a way that stimulates interest, desire and action to purchase. A cohesive, coherent and cogent marketing strategy auctioned through a range of marketing and promotional activities targeted at the most promising market segments is critically important to successful tourism product development.

The case for government marketing support for its destination is the fact that the customer is "remote" from the place he/she is considering to visit, and from the individual tourism products and services available. The first decision is typically, therefore, the choice of destination. It has become the norm under such circumstances for the destination authority to contribute – either fully or jointly with the private sector – towards the creation of a strongly positive image in the marketplace for the destination. Once the destination is chosen, it is the responsibility of the providers of the individual tourism facilities, attractions and activities to attract their customers. The role of the destination authority is thus focussed on destination image building and maintenance activities (in the form of a mix of tools including destination website, participation at overseas tourism fairs and exhibitions, organising familiarisation visits for international travel trade personnel and media representatives, advertising and

[13] Handbook on Tourism Product Development. UNWTO & ETC. 2011

promotions, and tourist information offices or contracted marketing and/or public relations representatives in major tourist generating markets).

1.6.5. *Management and Coordination*

As stressed in section 1.5. on planning tourism development, there is a paramount need for continuous monitoring of the progress of the tourism sector. This should take account of the extent to which developments are being realised in terms of the scale, and to the timeframe, planned (e.g. in respect of infrastructure, facilities and amenities for tourism, education and vocational skills training programmes), and market conditions (in particular competitor destinations' developments and marketing activities). Keeping all development and operational elements of the tourism sector on track and in synchronisation with each other requires careful and insightful management and coordination between all entities involved, led by a strong government ministry or department for tourism.

1.7. Identifying and Prioritising Tourism Product Development Opportunities

In view of the necessity for destinations to select and support those product developments that are likely to produce maximum benefit for its economy and populations, extra emphasis is placed in this report on how to identify and prioritise tourism product development opportunities.

Governments support tourism development for primarily for economic reasons: some place inward foreign investment as the key priority; while, others support the tourism sector for its ability to create economic activity – on a small to medium scale – in areas and among communities that have few alternative forms of development and economic advancement. The latter approach is certainly the case in the great majority of Least Developed Countries.

It is also important to recognise the significance of domestic tourism demand. Recognising that tourism also has environmental and socio-cultural impacts, by virtue of taking place in the host country, destinations seek to shape tourism product development so that in addition to creating economic benefits it increases the attractions and facilities that the local population can enjoy while avoiding negative impacts on the area's natural resources or society.

To meet the variety of objectives set for the tourism sector, there are many approaches that destinations adopt to tourism product development. The 20 possible criteria used by governments in determining its priorities, can be grouped under three headings - economic, socio-economic, and management and coordination – though it is clear that there is a considerable degree of overlap and interdependence:

1.7.1. *Economic Priorities*

- to attract foreign investment
- to achieve more rapid and extensive development of the tourism sector

- to assist product-market diversification
- to assist product innovation
- to reduce the risk of over-concentration on a narrow product range (and limited market base) by facilitating the development of a new range of products identified through market research as being in line with market trends and preferences
- to adjust the seasonal pattern of visitation through product developments that will spread tourism more evenly across the year
- to increase employment, tourism being a sector that is labour-intensive
- to boost local SME development in order to retain a higher proportion of economic benefits through the reduction of leakage and increased backward linkages

1.7.2. Socio-economic Priorities

- to facilitate regional development by improving access to an area or attraction, or boosting sustainable tourism product development tourism in a part of a country not benefiting from the sector as much as other parts e.g. rural areas, urban regeneration projects
- to assist the development of responsible tourism products (i.e. fairness to local community/pro-poor)
- to support community-based tourism projects
- to seek to alleviate/eradicate poverty through programmes such as Sustainable Tourism for Eliminating Poverty
- to create a flagship attraction that represents a geographic hub in a part of the country allowing other complementary products to be developed to create a cluster – can also be a thematic flagship hub

1.7.3. Management and Coordination Priorities

- to ensure the development of sustainable tourism, balancing economic benefits with the retention of environmental resources and the host community's values and culture
- to enhance the quality of the product offering
- to build a strongly positive image of the destination, by endorsing products of prestige and quality, thereby creating benefits both from tourism and through inward investment in other industries
- to coordinate tourism product developments that involve multiple assets and entities
- to facilitate tourism product development that is dependent on State intervention and would not occur otherwise
- to ensure that tourism product development is in line with protection/preservation of ecologically sensitive environments and the conservation of a community's cultural heritage and historic sites
- to coordinate the development and marketing of product clusters and trails/circuits

The criteria that determine a destination's priorities in respect of the tourism sector – and specifically tourism product development – cannot be applied unless the organisational structures, processes, plans and coordination mechanisms are in place.

Destinations placing strong emphasis on economic contribution need to demonstrate proactive support for new product development through the preparation of:

- a clear strategy,
- a product portfolio of opportunities, and
- an investment plan.

2. GLOBAL TRENDS AND POLICIES IN TOURISM PRODUCT DEVELOPMENT AND MARKETING

2.1. TRENDS IN GLOBAL TOURIST MARKETS

2.1.1. MARKET CONDITIONS AND CHANGING SOURCE MARKETS

International tourist arrivals and receipts reached 1.035 million and $1,075 billion respectively in 2012, continuing the long term growth trend with global arrivals rising by 3.6% a year between 2005 and 2012. The world's emerging economies recorded an average annual rise of 4.8% a year over this period as against 2.6% by advanced economies[14]. The leading tourist receiving areas remains Europe which recorded shares of 52% in arrivals and 43% of receipts in 2012). Next is the Americas (16% of arrivals and 20% of receipts in 2012). The fastest growing regions, however, are Asia and the Pacific (up 7% in 2012 to a 23% share of arrivals and a rise of 6% in receipts to a 30% share). Arrivals and receipts in the overall Africa region both rose by 6% in 2012 to shares of 5% and 3% respectively. The Middle East experienced a decline both in arrivals (down 5%) and receipts (fall of 2%) in 2012 due to continued tensions in some of its destinations. The region's shares of arrivals and receipts are 5% and 4% respectively.

A review of international reports and trend data indicates the following:

- More and more destinations are seeing tourism as a sector to foster and invest in. Tourism has become a central element of socio-economic development and a source of export revenues, jobs, and infrastructure development. Tourism has become one of the largest and fastest-growing economic sectors in the world.
- Many new destinations have emerged apart from the traditional favourites of Europe and North America. South East Asia, the Middle East and West Africa have all seen growth to varying extents.
- The market share of emerging economies increased from 30% in 1980 to 47% in 2012, and is expected to reach 57% by 2030, equivalent to over one billion international tourist arrivals.
- In 2012, travel for holidays, recreation and types of leisure accounted for just over half of all international tourist arrivals (52% or 536 million arrivals). Some 14% of international tourists reported travelling for business and professional purposes and another 27% travelled for other purposes, such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment, etc.[15]

Most international travel takes place within traveller's own regions, with about four out of five worldwide arrivals originating from the same region. The source markets for international

[14] Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook, April 2012 at www.imf.org/external/pubs/ft/weo/2012/01

[15] *Tourism Highlights 2013*, UNWTO

tourism however have traditionally been largely concentrated in the advanced economies of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth over recent years, especially in a number of markets in Asia, Central and Eastern Europe, the Middle East, Africa and Latin America.

Europe is currently still the world's largest source region, generating just over half of all international arrivals worldwide, followed by Asia and the Pacific (23%), the Americas (17%), the Middle East (3%) and Africa (3%).

Visa's 2013 *Global Travel Intentions Study* confirms that global cross-border tourism is thriving. The Study, which surveyed 12,631 travellers from 25 countries, estimates an average global travel budget of US$2,390. Top spenders abroad are the Saudi Arabians, spending an average of US$6,666 per trip, while Australian (US$4,118) and Chinese travellers (US$3,824) were not far behind. Future travel budget increases are especially high amongst Asian markets with a predicted increase of 46%: Travellers from Singapore, Thailand and Hong Kong all plan to at least double the budget of their last trip in the future. Visa's regular barometer of travel trends indicates that the pull of attractions, scenery and rich culture have become stronger motivating factors for travel than available budgets.

Among travellers across the four global regions surveyed by Visa (Asia-Pacific; the Americas; the Middle East and Africa; Europe), respondents from Asia-Pacific indicated the strongest intention (77%) to travel more in the future, mainly within the region itself. The Asian markets have experienced a huge boom in tourism over the past few years due to the continued strength of their economies and the implementation of policies that promote cooperation and coordination in cross-border tourism.

According to UNWTO, China is now the biggest spending nation on outbound tourism, moving up from seventh in 2005, overtaking Italy, Japan, France, the United Kingdom, the United States and Germany. Faced with slower rates of growth from the traditional tourist source regions of Europe and North America, consequent upon the financial crisis of 2008 on and the subsequent economic downturn, destinations have been increasingly turning their attention to attracting tourists from those countries with more robust economies, such as China and the Russian Federation.

The leading tourist generating markets in terms of spending overseas are shown in Figure 2.1. In rank order, China, Germany, the United States, the United Kingdom, and Russia are the world's leading tourist source markets in terms of expenditure. Collectively, these 5 countries account for over one third (34%) of world tourism spending.

Figure 2.1 - Leading Tourist Source Markets in terms of Expenditure, 2005 – 2012

World's Top Tourism Spenders

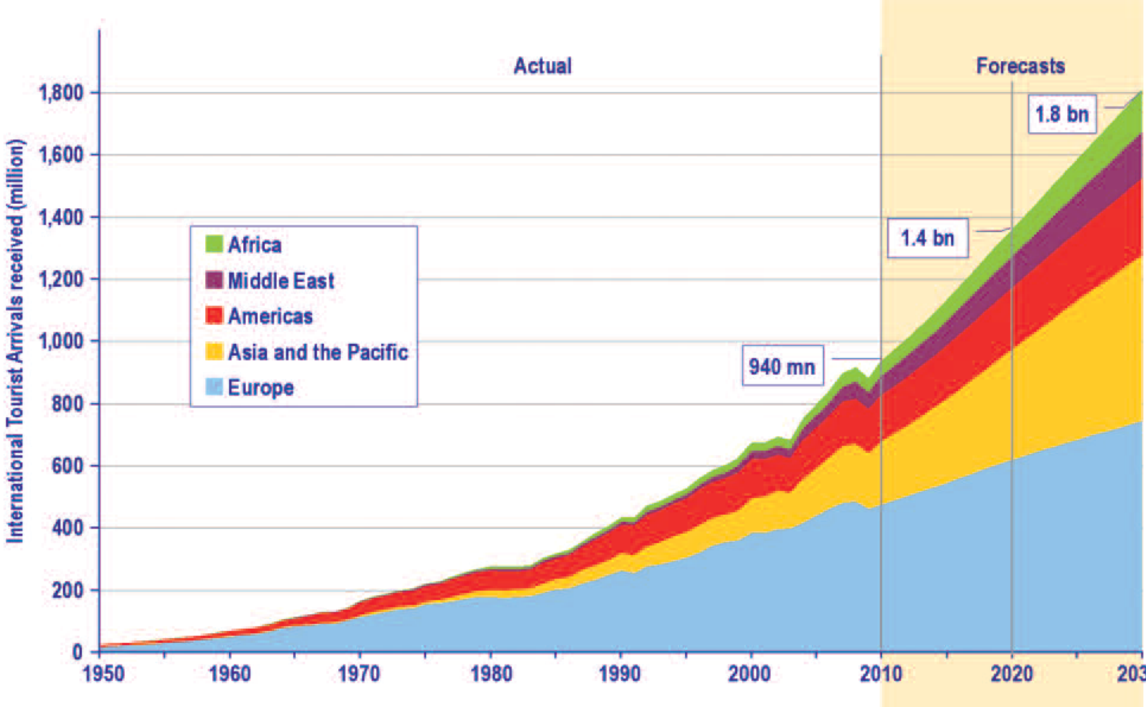
Rank		International Tourism Expenditure (US$ billion)				Local currencies Change (%)		Market share (%)
		2005	2010	2011	2012*	11/10	12*/11	2012*
1	China	21,8	54,9	72,6	102,0	($) 32,3	($) 40,5	9,5
2	Germany	74,4	78,1	85,9	83,8	4,7	5,8	7,8
3	United States	69,9	75,5	78,7	83,7	4,2	6,4	7,8
4	United Kingdom	59,6	50,0	51,0	52,3	-1,6	4,1	4,9
5	Russian Federation	17,3	26,6	32,5	42,8	($) 22,1	($) 31,8	4,0
6	France	31,8	39,0	44,1	38,1	7,6	-6,4	3,5
7	Canada	18,0	29,6	33,3	35,2	8,2	6,7	3,3
8	Japan	27,3	27,9	27,2	28,1	-11,2	3,1	2,6
9	Australia	11,3	22,2	26,7	27,6	7,0	2,9	2,6
10	Italy	22,4	27,1	28,7	26,2	0,8	-1,0	2,4
11	Singapore	10,1	18,7	21,4	22,4	5,7	3,9	2,1
12	Brazil	4,7	16,4	21,3	22,2	($) 29,5	($) 4,6	2,1
13	Belgium	15,0	18,9	22,1	21,7	11,1	6,6	2,0
14	Hong Kong (China)	13,3	17,5	19,2	20,5	9,7	6,7	1,9
15	Netherlands	16,2	19,6	20,5	20,2	-0,4	6,5	1,9

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO April 2013)
$ = percentage derived from series in US$ instead of local currency

2.1.2. FUTURE TRENDS AND FORECASTS IN TOURISM

In terms of future growth, UNWTO's *Tourism Towards 2030* predicts that International tourist arrivals in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa will grow at double the pace (+4.4% a year) of that in advanced economy destinations (+2.2% a year). As a result, arrivals in emerging economies are expected to exceed those in advanced economies by 2015. Figure 2.2 illustrates the future increase in international tourist arrivals by receiving region.

Figure 2.2 - Forecasts of International Tourist Arrivals to 2030



Source: UNWTO Tourism Towards 2030

In 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980). By region, the strongest growth will be seen in Asia and the Pacific, where arrivals are forecast to increase by 331 million to reach 535 million in 2030 (+4.9% per year). The Middle East and Africa are also expected to more than double their arrivals in this period, from 61 million to 149 million and from 50 million to 134 million respectively. Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) will grow comparatively more slowly.

While the market for 'sun and seaside' holidays remains strong with growth from Eastern Europe, Russia and within China, in overall terms there is some evidence that this market is over-supplied with tour operators forcing down prices. There is also a trend towards more experiential holidays with visitors seeking education, activities and culture in addition to rest and relaxation. More frequent shorter holidays, such as 'city breaks', have become popular. This has been partly driven by the growth of low cost carriers (LCCs) in Europe, North America and South East Asia. The vast majority of leisure travel remains on conventional carriers however. There is also a trend in developed economies towards more responsible tourism and greater awareness of tourism's potential negative effects on the environment.

2.1.3. *Implications for Tourism Product Development*

The changing pattern of international tourism, both occurring presently and anticipated in coming decades, has the following main implications for destinations in respect of their tourist product development and marketing strategies;

- A greater volume and range of tourism product types are needed, both to handle the increased numbers of tourists and the changing mix of source countries with differing requirements e.g. the Chinese holiday tourist demands multiple organised activities as their trips are of shorter duration than the typical visitor from western markets,
- Product development focussed on the natural and cultural heritage of destinations, reflecting prospective tourists' increasing knowledge about, and demand for direct access to, these features of the destinations they visit,
- Increased focus on product developments at two extremes: high end attractions and facilities (responding to rising budgets); and local level, community developments and activities (giving interested segments the opportunity to engage with the host population).
- A need to take the environmental and social implications of tourism development into greater consideration, recognising that tourism development can have significant negative impacts if not responsibly managed.

The three sub-sections above have examined the present performance and trends in international tourism worldwide and assessed the major implications for future tourism product development. The next sub-section examines how these factors are being translated by destinations into tourism product development and marketing strategies.

2.2. Global Trends in Tourism Product Development and Destination Marketing Strategies

2.2.1. Adapting Products to Changing Market Trends

The 20th century tourism development model saw much large scale beach tourism development. The resulting product has almost become a price-led global commodity, where one beach holiday competes with beach holidays anywhere else in the globe. The trend in 21st century tourism development is however increasingly becoming more sophisticated as products are more and more designed with specific market segments in mind:

- products for followers of specific sports or other activities;
- design hotels based around interest in specific designers;
- specialist attractions featuring specific themes;
- products themed around food;
- products themed around artistic interest, etc.

Mass tourism products which appeal to large volume tourist markets also continue to be developed as tourist demand for these types of products continues to grow, albeit at a slower rate than for the smaller volume product categories. Sun and sand, beach and marine products are still in demand though an increasing portion of this broad market looks for additional nature or culture-based features i.e. beach plus segments. These added features can also take the form of shopping in major malls such as in Dubai and Kuwait, or mega attractions and architectural icons such as national museums and galleries.

The BRIC countries are a key source of future growth. China has been identified as the future dominant source of outbound tourism growth for quite some time. Mandarin or Cantonese-speaking sales staff, hotels which do not book Asian guests on the fourth floor (the number four represents death), hotel reception on the 8th floor (good luck), and *congee* breakfasts are becoming a feature of hotels. Visa regulations are being eased.

Changing market conditions require changes to both product and marketing approaches. The following new or reshaped product development trends are emerging:

2.2.1.1. Cruises

Cruise tourism is booming in the 21st century with cruise liners becoming floating cities carrying as many as 5,000 passengers and a 1,000 member crew. It should be noted however that cruise tourism (like many aspects of mass tourism) can have significant negative environmental and social aspects which are often not well understood, and which require careful management (see case study 2.3.3. Alaska Cruise Initiative).

In parallel with the growth in seas-going cruise tourism, there is also a strong growth in packaged river and lake cruising, often with cross-selling to previous customers.

2.2.1.2. Product for Ageing Traditional Markets

More active seniors are already apparent and this will continue to be a feature of key outbound markets from Europe and Japan. Even the most buoyant tourism market of the 21st century, China, is rapidly ageing: in 2009 there were 167 million 'over-60s', about an eighth of the population; by 2050 the number of 'over-60s' will swell to 480 million[16]. Medical and shopping tourism, rail, cruise and spas are emerging products which are expected to perform well.

2.2.1.3. Youth Market Developments

At the other end of the age scale, affluent youth is also a growing market. Heavily influenced by new media and social networks, this segment is seeking experiential holidays, often with their own peers, and can be willing to explore new destinations. Events, cost efficient travel and budget accommodation are often needed (see case study 2.3.6. Australia Youth Marketing).

2.2.1.4. Shopping

The Middle East and South East Asia have an increasingly strong shopping tourism product appealing to increasing consumerism in both East and West. Shopping at malls is an important leisure activity for visitors to these regions. Dubai leads the Middle East region with the Dubai Shopping Festival drawing an estimated 3.5 million visitors in 2011. Shopping is also the main tourist activity in Kuwait where the Avenues Mall is the key attraction. During shopping festivals, hotels often record close to 90% occupancy, especially those close to malls. Malaysia competes with Thailand as a prime shopping destination in South East Asia. A new trend has emerged where hotels are moving from being "near" to being "inside" malls or connected to

[16] http://knowledge.ckgsb.edu.cn/2012/10/17/demographics/aging-china/

them for easy access. Bespoke shopping services at the hotels and even "shopping packages" offering multi-mall day trips are developing products.

2.2.1.5. Luxury

New products are being developed for the luxury traveller, and more destinations are recognising the value of this segment. Most luxury tourism takes place in the USA and Europe. However, island destinations (e.g. Mauritius, the Maldives, and the Caribbean), and luxury safaris (in Kenya and Tanzania) are growing in popularity with the affluent tourist. Cuba and South East Asia are emerging as 'new' luxury destinations according to Euromonitor. That said, the Middle East is seeing by far the largest growth in both new and up-market hotel rooms. Growing luxury source markets globally are the BRIC countries, particularly China[17].

2.2.1.6. Changing Lifestyles and the Experience Economy

Apart from the Internet revolution and the virtual worlds which are now possible to experience at home, there is a growing desire for experience and knowledge in the real world. This is driving demand for tourism to offer more new experiences, and in particular education and experience-based products. This trend is particularly relevant to visitor attractions and nature where more than a passive experience is demanded. For example, next-generation zoos are emerging in Germany, Spain, the USA and Singapore. Visitor experiences on holiday review sites such as Tripadvisor.com show that tourists increasing value "happy looking animals" in spacious natural surroundings. Trends are to develop breeding programs; cameras inside enclosures in order to follow animals when they are "not on stage"; interactive touch screens; sensory environmental awareness paths; insight into behavioural experiments; night safaris, accessible and informative staff and quality restaurants.

2.2.1.7. Culture

A direct result of the electronic technological developments of recent years has been the facilitation of instant and full access to every part of the world. This in turn is fuelling increasing interest in the culture and heritage of different societies around the world. Demand for cultural heritage tourism takes many forms e.g. built heritage (evidenced by continuing strong interest in World Heritage Site enlisting), manifestations of the social traditions and skills (e.g. local souks and bazaars, traditional handicrafts, local food and drink), and living culture, evidenced by the significant growth of arts and music festivals as tourist icons.

2.2.1.8. Nature

In increasingly urbanised societies, interest in nature and a return to nature continues. Most countries are setting aside more rural land as protected areas, either as candidate World Heritage Sites or in accordance with the guidelines of the International Union for Conservation of Nature (IUCN). Guided treks in areas of outstanding natural beauty and significance are expanding e.g. Ecocamp Patagonia, Argentina[18], and Bushcamp Company, Zambia[19].

[17] http://www.wtmlondon.com/library_2/9621070_assocPDF.pdf
[18] http://www.ecocamp.travel/
[19] http://www.bushcampcompany.com/

The growth in nature tourism is also reflected in interest in rural tourism and smaller-scale boutique experiences, such as 'slow food' (e.g. SOULFOOD, Serbia[20],) or 'slow tourism' particularly within Western economies themselves. Demand for "natural luxury" is growing rapidly e.g. &Beyond Africa, South Africa[21].

2.2.1.9. Medical and Health & Wellness Tourism

Medical tourism is a significant growth area, partly as a result of ageing populations but also price-driven due to the high cost of treatment in some countries. In the Gulf Cooperation Council (GCC) area for example healthcare market is on track to grow 11.4% annually to $44billion until 2015, with specialised healthcare cities and other major hospital projects are springing up in the region, paving the way for medical tourists. The world's leading medical tourism destinations offer excellent value for money: India, Thailand and COMCEC member Malaysia.

Another branch of the broad health tourism market is for thermal spas e.g. in Turkey[22], thalassotherapy (see case study 4.1.9. Tunisia Thalassotherapy), and other self-pampering treatments.

2.2.1.10. Sports Tourism

The economies of cities, regions and entire countries are increasingly reliant on combining sport and tourism to jump start economic and socio-economic change: The London Olympics of 2012 and the football World Cup are examples.

Tourists engaged in sports tourism are often high-spending, stay longer than other tourist categories, and can stimulate other types of tourism. Their direct benefit to a destination is cash; their indirect benefit can be years of demand from tourists whose interest has been stimulated by sports facilities and events. There are many reasons for the sport tourism boom. The continued interest of society in fitness is prompting a shift in tourist patterns. As noted above, demand for sun and sea vacations, traditionally the main stay of the travel and tourism industry, is growing at a lower rate than for activity-sport related vacations and a new breed of tourists keen to attend an ever increasing calendar of readily-accessible mega sporting events. Sports tourism is one of the fastest growing sectors of the global travel and tourism industry (see case study 4.1.7. Aspire Zone, Qatar).

Skiing continues to have its dedicated, growing market and is generally a high-end product. Climate change is however increasingly affecting the viability of skiing at lower attitudes, and resort development moves higher and higher. Ski resorts are increasingly selling summertime hiking and activity packages to improve resort occupancy and vitality.

[20] http://www.serbia.travel/
[21] http://www.andbeyondafrica.com/
[22] http://www.turkeytour.net/turkey-thermal-spa-resorts/thermal-springs-in-turkey.html

2.2.1.11. Religious Tourism

Religious tourism continues to grow as religious revival and increasing wealth in developing countries spur it on. The re-development of Mecca and Medina has enabled these holy places to cope with growing volumes of visitors undertaking Hajj and Umrah. Major development is now taking place in the Shia Holy Cities of Najaf and Karbala, and at other holy sites. Sharia-compliant development is part of this trend.

Religious tourism to Christian holy sites in Europe, and to Buddhist, Hindu and Sikh sites in India and elsewhere also continues to drive product development to cope with mass tourism and rising expectations regarding quality and safety.

2.2.1.12. Meetings, Incentive, Conferences, Exhibitions

Meetings, incentive, conferences, exhibitions (MICE) tourism is an emerging aspect of tourism in many countries. Turkey, Egypt and most Gulf destinations for example have developed, or are further developing new product in the form of meeting facilities to attract larger numbers of international delegates. Interest in incentives varies and is closely aligned to the image of the destination.

2.2.1.13. Greening

There is a worldwide trend to green the tourism industry. Aviation, accommodation and transport are the three areas where travel and tourism have a major carbon footprint. Public transport is also the subject of major investment in many destinations. Ecotourism is moving into the mainstream. There are examples from all parts of the globe, including Australia[23], Finland[24], and Thailand (Green Leaf Initiative - see case study 2.3.4.).

2.2.2. *GLOBAL TRENDS IN MARKETING STRATEGIES*

Rapid changes in information technology have meant that it is now possible to obtain and store vast amounts of information on costumer behaviour and buying patterns. Specific groups sharing common characteristics can be relatively easily identified through data mining. Using information technology as a source of information and for test marketing it is easier to:

- identify groups of people (segments) who are (or will shortly be) in the market for an international trip;
- decide whether these are the people who, if they visited, would help fulfil the destination's tourism objectives;
- establish whether the destination has the appropriate products and services to meet their needs;

[23] http://www.daintree-rec.com.au/
[24] http://www.haikko.fi/

- assess whether people in these segments are realistically likely to consider the destination;
- establish their motivations/triggers, buying habits, etc;
- persuade them to visit using appropriate and targeted marketing messages and channels; and
- evaluate and review the impact of the marketing on the segments that have been targeted

Tourism Ireland for example has identified the following segments of Great Britain market which offer the most potential for the island of Ireland in 2013 and 2014 (GB Path to Growth[25]):

- Social energisers (young, fun-loving urban adventurers);
- Culturally curious (over 45s who want to broaden their minds); and
- Great escapers (younger couples who want to get away from it all)

There are however many different ways in which a market can be segmented.

The focus of tourism marketing is moving from relying on general 'above the line' campaigns, towards boosting this with 'below the line' activity, such as public relations (PR) and social marketing. This switch of focus is being made on two grounds: first, target consumer groups are increasingly researching their destinations on-line and checking out sites like TripAdvisor; and, second, it is proving more cost-effective than traditional advertising etc.

The national tourism offices of the ASEAN (Association of South East Asian Nations) group of countries have determined that internet-based marketing offers the most cost-effective opportunity to provide a competitive advantage for the region in its cooperative campaign. Its e-marketing approaches include the utilisation of social media networking and focus on the development of an integrative and well-maintained website to increase knowledge and interest in the region (ASEAN Tourism Marketing Strategy, 2012-2015)[26].

Because of this increasing sophistication, tourism destinations increasing purchase specialist advice from others to both design and implement marketing campaigns. This is likely to include advice from advertising and PR agencies; advice from tour operators and on-territory tourism authority staff; advice from research agencies; advice from trade publications – especially for niche segments; customer feedback; and statistical analyses of base segment information. A big divide emerges here between destinations which invest in commissioning professional marketing campaigns, and those countries who attempt to implement marketing campaigns 'in house', generally due to restricted marketing budgets.

Another example of the increasing specialisation of segmentation can be found in the visiting friends and relations (VFR) category, already referred to above. For many years, VFR was seen as one category and was to a large degree not targeted by tourism marketers, since it was thought to be worth little and hard to affect through marketing activity. Yet it is one of the

[25] http://www.tourismireland.com/

[26] http://www.iadb.org/intal/intalcdi/PE/2012/10151.pdf

largest tourism segments in most countries and in fact has very considerable economic impact. Today some destinations consider VFRs to be not one segment but two, which have very different features. This was first demonstrated in Northern Ireland where disaggregation of the VFR category suggested that it comprised two groups: those visiting friends (VFs) and those visiting relatives (VRs). VRs were found to be approximately four times as numerous as VFs and the profiles of the two groups differed. VRs tended to be older, family parties with children, while VFs were younger, travelled in smaller parties and stayed for shorter periods.

A similar re-evaluation was undertaken by Tourism Australia into the backpacker segment. Research highlighted that backpacker segment was definitely worth targeting because they:

- stay longer than many other segments;
- travel to more places, often remote and poorer ones;
- spend their money locally, and this money generally stays in Australia rather than being paid overseas through international hotel chains;
- are very likely to return later in life; and
- have a key influence on the fashionability of a destination.

2.2.2.1. Relationship Marketing

The idea of building up relationships with tourists to encourage them both to be a source of feedback for market research, as ambassadors, and as potential repeat visitors is currently to the fore. It is recognised that repeat visitors are of great economic value.

2.2.2.2. Growth of Social Communications Websites as Part of Destination Marketing

The rapid upsurge of social networking and communication sites is having a major impact on the ways in which travel and tourism products and services are marketing. The monthly use of Facebook, for example, has risen from 100 million users in 2008, to 500 million in 2010 and 1 billion currently. Usage is particularly high in developing nations like Brazil, India, Indonesia and Mexico.

Destinations see the opportunity to communicate their products and services, including through audio-visual means, online to this rapidly growing consumer base. For their part, prospective tourists are increasingly seeking instant, personalized and bookable services. This is all evidenced in the rapid growth of usual social communications networks as one of most important elements of national tourism marketing campaigns. It is however expensive to do effectively, and not all countries have social media marketing as part of their promotional mix. Some have yet to develop dedicated tourism marketing websites.

2.2.2.3. Changes in the Selection of Marketing and Promotional Activities

A well researched and balanced promotional mix remains a key part of marketing good practice. This splits into two categories: above-the-line (i.e. paid advertising to a large audience via print, online media, television, radio and cinema); and below-the-line (i.e. sponsorship, sales promotions, public relations, personal selling, direct marketing, digital and social media).

For tourism destinations, the marketing mix generally involves the following:

- Advertising campaigns
- Public relations campaigns
- Social marketing
- Exhibitions
- Sales missions overseas and in-country familiarisation visits

Most major tourism destinations like Thailand, Singapore, Australia and the USA, employ this combined and balanced mix of above-the-line and below-the-line marketing, promotional and public relations activities, with extensive use of e-marketing.

2.3. Destination Successes

The selection of best practice case studies from successful tourism destinations around the world is made on the grounds of finding examples with relevance to destinations seeking to further develop the range and type of tourism products offered and their marketing. The following seven examples relate to the system and process of tourism product development and marketing. They are chosen to illustrate:

- different facets of effective planning (i.e. the consultative, comprehensive, and coordinated approach),
- ways to meet set government policies for the tourism sector (e.g. moving towards a more sustainable approach to tourism that minimises environmental impacts and provides better participation for local people),
- the adoption of modern marketing strategies and techniques to exploit emerging, growth market segments.

The seven case studies according to the example of best practice each demonstrates are as follows:

1. New Zealand – as an example of comprehensive and integrated tourism development planning
2. Lake District, UK – coordination of tourism product development with multiple players, innovative and sustainable tourism product development
3. Alaska cruise shipping initiative – innovation and regulation as a means of managing development
4. Thailand Green Leaf– coordination of developing a green tourism product
5. Forodhani Park, Stone Town, Zanzibar, Tanzania – pro-poor tourism development
6. Australia – marketing to the youth segment
7. Kenya – tourism recovery programme

2.3.1. NEW ZEALAND TOURISM

Unless there is clear direction and systems established for future tourism product development, the real risk exists of a piecemeal approach without coordination. For that reason, the institutional arrangements for tourism are of critical importance.

Drawing together the analyses made in section 1, the formula proposed is for an institutional structure that:

- has status and is listened to by other parts of government,
- has a strong and effective form of communication with regional and local governments,
- provides a clear focal point, an open door and a listening ear for the private sector, and actively seeks to work in partnership with it,
- engages in widespread and meaningful consultation with communities, such consultation being full, open and ongoing, and, above all,
- has a system of coordination and communication in place that ensures that all players – both directly and indirectly involved in, or impacted by, tourism – are kept fully in the picture about new and proposed developments.

The case study relating to the New Zealand Tourism Strategy 2015 illustrates the key principles of consultation and coordination. Of the 92 activities outlined in the Implementation Plan, 14 are directly related to product development, with roles for numerous public agencies and private sector interests. The primary responsibility for these developments is spread across the government departments responsible for tourism, conservation and destination marketing, regional tourism organisations, the Maori Tourism Council, local authorities, and the private sector (i.e. both trade bodies and individual investors).

The establishment of a close working relationship between all levels of government and tourism industry representatives is likely both to be more efficient and illustrate to local communities that proposed new product developments have been well-researched through multi-party dialogue. The process of consultation with all parties can increase understanding and buy in from the population of the location where new developments are proposed.

A layered approach with a central product development planning division and a series of tourism development coordinating committees at the regional level, working together through both a regular forum and ongoing dialogue related to specific projects can be effective in ensuring full and appropriate consultation with all stakeholder groups. This can lead to coordination and collaboration in the development of tourism products that bring out the distinctive character of all parts of the country and spread the socio-economic benefits across the regions.

The New Zealand case study illustrates how tourism is planned in a way that embraces all stakeholders, and focuses clearly on how the plans are going to be realised.

Title & URL

New Zealand Tourism




http://www.nztourismstrategy.com/

Type of good practice illustrated

National institutional structures

Project description

Tourism (domestic and international) generated 6.9 billion NZD (4.15 billion Euro), or 3.8 per cent of GDP to New Zealand (NZ) in the year to March 2011, employing the full-time equivalent of 91,900 employees. The current strategy for tourism in NZ, *New Zealand Tourism Strategy 2015,* envisions tourism as a leading contributor to a sustainable economy, underpinned by the values of *guardianship (kaitiakitanga)* and *hospitality (manaakitanga).* It aims to address the global and domestic challenges, particularly the growing concern regarding the impact of travel on climate change, rising fuel prices and the growing popularity of electronic marketing and undertake activities such as recruiting appropriately skilled staff, becoming more environmentally sustainable and the provision of appropriate, high quality infrastructure. Its goals are to:

1. become highly competitive, capitalising the unique authentic experiences NZ has to offer;
2. maintain the profitability of the industry;
3. ensure the protection of the environment and
4. build strong relationships between community and tourism operator.
5. While there is no overarching body there are various stakeholders involved in the planning process:

Central Government:
Tourism is a recognised key contributor to the ‘Building Export Markets’ in the central government’s ‘Growth Agenda’ plan. The focus is on international tourism and growing export earnings and on the contribution tourism makes to ‘Brand New Zealand’.

Tourism New Zealand (TNZ)

Within that international-facing context, TNZ has the role of 'destination-New Zealand' marketing. In 2013, TNZ released its 2013-16 international destination-NZ marketing strategy. The 'Three Year Marketing Strategy FY2014 - FY2016' outlines short and long term priority markets, brand promotion, promotion of the international business events sector and the development of a niche sector for premium business travel. In 2010, TNZ undertook significant research in order to identify the key target market, the research carried out across 10 countries identified the 'Active Considerers' to tailor NZ's promotion, prioritising these markets. The goal is to encourage those actively considering NZ as a holiday destination to commit to purchasing. The campaign '100% Pure New Zealand' showcases NZ as fun, popular and accessible, and focuses on the experiences a visitor can have within the stunning landscapes and scenery of NZ.

Other Government Agencies
At a national level there are a number of government agencies (such as Ministry of Business, Innovation and Employment, Department of Conservation and the Ministry of Transport) which each undertake a variety of activities key to the health of tourism.

Local Government Authorities
At a regional level, local government authorities across NZ provide tourism with invaluable support. In return, their respective communities receive a valuable return on investment.

The Private Sector
Within the private sector a number of the larger operators have developed and are implementing their own visitor/tourism strategies. The Tourism Industry Association of New Zealand is a key player in representing the private sector.

Rationale and justification for project

In order to meet the needs of its tourism development, NZ highlights the necessity for collaboration from various stakeholders. It recognises that the tourism sector cannot reach its goals in isolation.

Details of project planning, development and operation

Public- Private partnership:
The Tourism Growth Partnership (TGP) is a government initiative that will co-invest in projects which help the tourism sector achieve greater commercial and wider returns from high-value international visitors. To encourage private sector interest, the TGP funds 50% of tourism-oriented projects. The TGP programme acts as an incentive to encourage entrepreneurs in the tourism industry. In the 2013 Budget, the government allocated 8 million per annum for TGP.

Projects may target one or more points along the tourism value chain. These points could include market development, distribution, or product and service development.

Key success features and practices

- ✓ Targeted markets
- ✓ Targeted tourism products
- ✓ Long and short term strategic planning
- ✓ Collaboration with all stakeholders
- ✓ Incentive for private investors
- ✓ Investment in infrastructure & facilities, conservation, communications

Sources of information	http://www.tourismnewzealand.com/media/1037749/tnz_statement_of_intent_-_amended_final_2_july_2013.pdf http://www.med.govt.nz/about-us/publications/briefings-to-incoming-ministers/briefings-to-incoming-ministers/BIM-Tourism-pdf

2.3.2. Lake District, UK

The Lake District case study illustrates how multiple interests among the triumvirate of stakeholder groups can be brought together to participate in, and support, the sustainable and innovative development and marketing of an extensive area with outstanding natural assets, recognising the mutual benefit of working together.

Title & URL	**Lake District, UK**  <http://www.golakes.co.uk/> <http://www.lakedistrict.gov.uk/home>
Type of good practice illustrated	✓ Coordination of Tourism Product Development (TPD) with multiple partners ✓ Innovation ✓ Sustainable TDP
Project description	The Lake District, in North West England, is renowned for its lakes, forests, mountains and picturesque valleys. Much of the district is a national park and twelve of the largest lakes in England are located in the area. It is one of the UK's most popular tourism destinations after London. Tourism is the mainstay of its economy. In 2009

visitors spent £925.7 million in the Lake District. 15.8 million tourists visited the Lake District and tourism provided 11,575 jobs (full time equivalents) in the National Park.

There are 3,500 kilometres of 'rights of way' for the public, which make it a popular location for biking and hiking and other outdoor pursuits. Activity products available in the district include; walking routes, cycling and mountain biking, water sports, wildlife watching, flying and paragliding, horse riding, etc.
Some key objectives include the following:

- Improving public transport services and traffic management to tackle congestion and reduce delays.
- Creating a network of pay-as-you-go car and cycle hire fleets, including recharge stations for electric vehicles.
- Developing safe, continuous networks for walking, cycling and wheelchair use.
- Making paying for, and changing between different modes of travel easier, through smarter and more integrated ticketing aimed at user markets.
- Targeted marketing and information designed to change visitors' travel behaviour to, from and around the Lakes.

Cultural tourism has also had an increasingly important role in the Lake District's tourism industry. The area has a strong historic tradition of literature and arts, featuring in the works of famous writers and poets such as Beatrix Potter and William Wordsworth. Hadrian's Wall, a UNESCO world heritage site, is also located in the District.

Tour operators run specifically themed packages in the area, for example adrenaline-filled activity breaks (survival skills, night hikes, night canoeing, etc) cultural packages (historical buildings, art exhibitions, garden visits) and luxury weekends (spas, lake cruises, artisan meals). The **Lake District Pass** (available on the online shop) incorporates entry to over 20 of the popular attractions in the area under one ticket. There is a wide range of accommodation available in the District, catering for all needs (hotels, B&Bs, guesthouses, self-catering, campsites, farmstays, inns and restaurants with rooms and 'quirky accommodation' like huts and cabins).

Rationale and justification for project

The Lake District is made up of many hundreds of small tourism-related businesses. This project is a successful example of bringing these together to create an environment-based product.

Details of project planning, development and operation

The Lake District National Park Authority (LDNPA) has 22 members who represent public interest. They are appointed by the Cumbria County Council, District Councils, Parish Councils and the Secretary of State. These members are the decision makers and represent the park nationally. The LDNPA also employs around 200 staff as rangers, planners, archaeologists, administrative staff and in information centres. The LDNPA also has a large and active Lake District Volunteers Service.

The Lake District National Park Partnership (LDNPP) has the role of developing new planning policies. It is a major driver in the national park's achievements and has much stakeholder representation, made up of a number of representatives from the public, private, community and voluntary sectors.

Funded by the Department of Transport, the **Go Lakes Travel programme** is an initiative aimed at addressing growing traffic problems in the area by changing

	visitors' behaviour. In addition, other sponsors and funding agencies are contributing substantial funds to the Go Lakes marketing and other initiatives.
Key success features and practices	✓ Partnership Strong environmental focus ✓ Use of sustainable transport options ✓ Targeted marketing and Strong online presence ✓ Local environmental management incentivisation ✓ Low carbon community
Sources of information	http://www.lakedistrict.gov.uk/learning/lakedistrictfacts/factstourism/factstourismeconomy Images: http://www.lakedistrict.gov.uk/learning/freephotos © Helen Reynolds, LDNPA & Nick Thorne

2.3.3. Alaska Cruise Shipping Initiative

The Alaska Cruise Shipping Initiative case study is chosen as a good example of how a destination area can protect itself against over-development and usage. Faced with rapid growth in cruise ship activity on the area, an initial local initiative has developed into an industry-wide set of regulations governing the operation of cruise ships.

Title & URL	**Alaska Cruise Shipping Initiative** (now the Commercial Passenger Vessel Environmental Compliance Program), USA   http://www.dec.alaska.gov/water/cruise_ships/index.htm
Type of good practice illustrated	Innovation, regulation
Project description	Cruise ship tourism has experienced massive growth in the last thirty years. During these three decades, the number of people opting to spend their vacation on board one of these vessels has multiplied by at least 25. Approximately 50 companies control most cruise ships that carry millions of passengers from one point of the planet to another. Some of the most popular tourist destinations are those which, at the same time, are the most sensitive to environmental disturbance.

	Big cruise liners can carry up to 5,000 people, including a crew of more than 1,000, which makes them genuine floating cities with significant economic impact (mostly on the ship itself). Onboard facilities include swimming pools, theatres, cinemas, restaurants, shops, saunas, tennis courts, photo processing shops, laundries, and dry cleaning. All these activities generate hundreds of tons of waste of every kind, some of which is often thrown into the sea. In addition it is estimated that a cruise ship burns at least three times more carbon per passenger than an airliner. By the 1990s Alaskans had become seriously concerned about cruise ships. Consequently, the Alaska State Department of Environmental Conservation along with the United States Coast Guard, launched a cruise ship initiative in December 1999. The initiative began with meetings between the State, Coast Guard, Environmental Protection Agency (EPA), the cruise industry, and environmental groups. The goal was to discuss the activities and operations of cruise ships with a view toward an assessment of possible environmental issues. When the workgroups realized there was little technical data, they developed a plan for sampling wastewater from cruise ships and for monitoring air emissions. Participation in monitoring was voluntary. Thirteen of 24 ships refused to participate. The results of monitoring during the summer of 2000 were disturbing: 79 of 80 samples of ships' effluent had levels of faecal coliform or total suspended solids that violated even the weak Clean Water Act standards of the day by, on average, over 10,000 times, with a high of over 140,000 times the federal standard. Air emission monitoring also gave reason for concern. The EPA had cited six cruise ship companies (involving thirteen ships) for air pollution violations in the 1999 season. The situation did not improve. In August 2000, state investigators charged seven companies for fifteen violations of state smoke-opacity standards. Air emissions from ship engines are a serious source of pollution with significant human health implications, because many ships burn bunker fuel, typically what remains of the crude oil after gasoline and distillate fuel oils are extracted through refining. Monitoring results led to legislation to regulate the dumping of raw sewage, banned discharges while ships were within one mile of shore, and empowered the State of Alaska to regulate black water (sewage) discharged into state waters. By setting standards, Alaska seeks to ensure wastewater and air emissions released in state waters meet criteria similar to those for effluent produced on land. If a ship fails to meet state limits, it is liable to lose its permit for discharge in Alaska waters and be required to sail beyond state jurisdiction to release wastewater. The State's initiatives have had a positive impact on the quality of effluent discharged within three miles of the shoreline.
Rationale and justification for project	The Initiative tackles the issue of cruise tourism product development, the impacts of which are often not well understood by aspiring cruise liner destinations. It illustrates the need to balance tourism development with environmental protection and host community vigilance.
Details of project planning,	In order to operate in Alaskan waters, a Vessel General Permit (VGP) is required. Registration for this permit is only available to vessels which meet the stringent effluent criteria including the treatment of wastewater before discharge. As of

development and operation	December 2013, the 2008 Vessel General Permit (VGP) will be replaced by the 2013 VGP, which regulated 27 specific discharge categories and is aimed at improving the efficiency of the permit process and provide more clarity. It has advanced in many areas since the 2008 VGP, especially; reducing the risks of invasive species, increased protection for the Great Lakes, reducing administration for vessel operators (electronic record keeping, avoiding duplication)
Key success features and practices	✓ Introducing environmental controls on polluting aspects of tourism ✓ Host community empowerment ✓ Investment in environmental monitoring and cleaner energy systems ✓ Government engagement in monitoring pollution from tourism
Sources of information	Oceana (2004) *Contamination by cruise ships.* Klein, R. (2009) *Getting a grip on cruise ship pollution.* Friends of the Earth. http://www.newsreview.com/chico/cruise-ships-plug-in-to-sfs-grid/content?oid=1861779

2.3.4. *THAILAND GREEN LEAF INITIATIVE*

This case study demonstrates how an initial campaign by a non-governmental organisation, aimed at creating awareness of the benefits of adopting sound environmental practices, can be adopted as official government policy to guide and manage the development of the tourism industry.

The importance of environmental protection in sustainable tourism product development recognises and responds to three factors:

- first, that sustainability entails development where the environment is not significantly harmed;
- second, that tourism activity based on environmental features can provide a long term source of income; and,
- third, that the twenty-first century tourists are increasingly demanding ecotourism experiences and activities based on the pristine and protected natural resources of the destination.

Title & URL	**Thailand's Green Leaf initiative**

http://www.greenleafthai.org/

Type of good practice illustrated	Coordination of developing green tourism product

Project Description

Thailand's Green Leaf Foundation has been a key player in the coordination of green tourism initiatives since its foundation in March 1998. It has the following objectives:

- Promote *knowledge* and support studies and research in the creation of a good understanding of environmental conservation.
- *Assist owners and operators* in the tourism industry to develop environmental quality standard in their work place.
- Develop *standards* of environmental practices for tourism and tourism-related business in responding to consumer's requirement.

The Foundation has organized many training seminars on environmental educational, environmental standards, and energy efficiency for tourism practitioners. The focus was initially on facilitating the efficient use of energy and natural resources under the theme "Save Money, Save Environment." The Tourism Authority of Thailand (TAT) supported the programme by conducting regional awareness-building seminars and trainings including Green Hotel Fairs which were attended by more than 1,000 hotels across Thailand. An eco- certification program called Green Leaf was created to institutionalise environmental best-practices for all hotels, as well as to promote the efforts of those who already contribute to the protection of environment via efficient management of energy, environmental and natural resources.

TAT launched its ***Thailand Goes Green*** promotion at ITB in 2012. The campaign features the *Seven Greens* and includes a strong element of regional tourism promotion as visitors are encouraged to visit remote areas such as the north and north-east, where TAT is particularly keen to promote sustainable tourism. Green Leaf hotels are also promoted, and there are now 470 of them certified to various levels.

Thailand's revenue per available room (RevPAR) grew 15.4 % in 2012 to THB 2,232, according to STR Global, the leading provider of market information to the hotel industry. The returning demand levels (+13.3 %) helped boost occupancy 10 % to 69.2 % and grew average daily rate (ADR) 4.9 % to THB 3,226. The increase in hotel performance was underlined by the growing numbers of visitors to the country as

	Thailand welcomed 22.3 million visitors in 2012. In 2013, the TAT has further extended Seven Green to include promotion of organic food and rural development through joint marketing with Thailand's 'One village, one product' (OTOP) initiative.
Rationale and justification for project	Thailand is the world's twelfth most popular inbound tourism destination with over 23 million international arrivals in 2012. Thailand faces significant ecological challenges including water shortages due to less rainfall, massive waste disposal challenges and extensive coastal tourism development. The Green Leaf initiative illustrates a long term commitment to the coordination of green tourism.
Details of project planning, development and operation	The Green Leaf Foundation is a key player in TATs *Thailand Goes Green* campaign. The Foundation, a non-government organisation (NGO), has existed since 1998 with support, funding and sponsorship from a wide range of local and international organisations.
Key success features and practices	✓ Sustained commitment to greening tourism ✓ Recognition that managing tourism's impacts requires as much if not more state effort than promoting tourism's expansion ✓ Bringing together key partners from within and without the tourism industry ✓ Building on success ✓ Inclusive approach, bringing in new partners ass initiative expands ✓ Aims to spread tourism to poorer, remoter areas ✓ Overall Government coordination ✓ Market oriented ✓ Realises the importance of domestic tourism ✓ Realises the importance of marketing
Sources of information	TAT Green Hotels Thailand DVD; World Travel Market interview (November 2012).

2.3.5. FORODHANI PARK, STONE TOWN, ZANZIBAR, TANZANIA

The pro-poor tourism development programme at Forodhani Park in Zanzibar directly benefits the Muslim community of the area but, though semi-autonomous, it is part of Tanzania.

Title & URL	**Forodhani Park, Stone Town, Zanzibar, Tanzania**  http://www.facebook.com/forodhani.zanzibar
Type of good practice illustrated	Pro-poor tourism development
Project description	Forodhani Park is a large public space on the seafront of the Indian Ocean in Zanzibar, Tanzania. A large scale, ambitious regeneration project was completed in 2009 in cooperation with the Government of Zanzibar. The restoration of Forodhani Park is part of a comprehensive programme for seafront rehabilitation in Stone Town, a World Heritage Site. The project's goal was to regenerate and rehabilitate the garden, by reconciling its modern use with its historic tradition, therefore, its original elements were preserved and restored, and new features were added, aiming to create a contemporary urban space without destroying the historic significance and character. Today, as in the past, Forodhani Park functions both as an active meeting place and passive promenade. The impact of the Park restoration has been: • Creation of 200 new jobs in the construction phase;

	• Stimulation of the local economy through Park reconstruction costs of approximately US$2.4 million; • Generation of employment opportunities in the informal sector; and, • Creation of a more attractive environment for Zanzibaris and visitors.
Rationale and justification for project	Forodhani Park had become a prime area of social gathering in the city. Intense tourism, leisure activities and successful trade (especially the popular street food market) meant the challenge identified was finding a balance between controlling the intense level of activities, which was causing degradation; without inhibiting the long-established social and commercial interactions which gave the area its historic character.
Details of project planning, development and operation	First proposed in 2001, the initiative is part of a programme to regenerate the seafront area in the Stone Town. The project was then driven by a steering committee – the Stone Town Conservation and Development Authority (STCDA).. During the design, drawing and preparation phase, the steering committee carried out public consultation with the local community. Three workshops were held in order to understand public opinion and collect comments. Citizen's comments were then taken into account before restoration work started, for example, the modification of the existing external staircase was a public suggestion. The total cost of the project was US$ 3.2 million, which was funded by the Zanzibar Government the World Bank, and other donor organisations.
Key success features and practices	✓ Responsible tourism management ✓ Community engagement ✓ Micro-enterprise orientated ✓ Local food traditions ✓ Urban regeneration ✓ Retention of open space ✓ Creating local pride in World Heritage ✓ Pro-poor ✓ Established scheme for sustainable future management of park ✓ Financial resources generated within the property
Sources of information	www.akdn.org/Content/1181 http://whc.unesco.org/uploads/activities/documents/activity-634-14.pdf www.akdn.org/Content/839

2.3.6. AUSTRALIA YOUTH MARKETING

Australia recognised the opportunity to use social media to communicate with the youth market, the section of the population with the highest levels of usage of Facebook and Twitter. Its campaign has resulted in strong growth in the youth market segment, now accounting for one-in-every-four arrivals in the country.

Title & URL	**Australia marketing to the youth segment**  http://www.tourism.australia.com/
Type of good practice illustrated	Research-based marketing
Project description	Australia's innovative approach to social media included the highly successful, award winning Best Job in the World campaign. This concept went viral with worldwide coverage for a caretaker position on a beautiful Queensland island. The 'best job' campaign spawned many of copy cat attempts by other destinations, but Tourism Australia now has more than four million Facebook fans, 80,000+ followers on Instagram, and over 40,000 Twitter followers, due to its strong social marketing campaigns aimed at engagement with consumers. Lee McCabe, Facebook's global head of travel, told international delegates at the World Travel and Tourism Council Global Summit that tour operators, hotels and tourism boards around the world trying to develop a Facebook strategy should "look no further" than Tourism Australia's strategy. Today youth is an important target segment for Australian tourism, representing 26 per cent (1.6million) of all international visitors to Australia. As the Australian dollar (A$) strengthens and the cost of backpacking increases, working holidaymakers have been identified a specific segment within youth. The youth segment spends around A$13,000 while in Australia, much higher than the average spend by youth travellers of A$7,000 per trip. 136,155 working holiday visas were granted for the six month period to 31 December 2012, a 23.2 per cent increase compared to the six month period to 31 December 2011.
Rationale and justification for project	Tourism Australia and state authorities have conducted extensive market research into the potential of youth tourism over the past decade. Tourism Victoria for example has a Backpacker Tourism Strategy. These research-based approaches guide the campaign. The choice of appropriate social media to attract youth is important.
Details of project planning, development and operation	The campaign is planned and commissioned by Tourism Australia and Queensland state authorities. Campaign design and placement is through an advertising agency, choosing social and other media appropriate to the target markets
Key success features and practices	✓ Research-based advertising aimed at specific targets ✓ Use of social media
Sources of information	Tourism Victoria (2009) Backpacker Tourism Action Plan 2009-2013 < http://www.tourism.australia.com/media/9196-8417.aspx>

2.3.7. KENYA RECOVERY PROGRAMME

Kenya suffered a halving of its tourism sector in consequence of the political disturbances of 2007/8. To regain its position as a warmly hospitable destination, the *Jambo!* ("welcome") campaign featured images of ordinary Kenyans to counter negative perceptions of the country.

Title & URL

Kenya Tourism Recovery Campaign

Kenya Tourist Board stand at World Travel Market, London in 2010 with Jambo branding
http://www.magicalkenya.com/

Type of good practice illustrated

Strategic marketing campaign

Project description

Kenya is the leading tourism destination in East Africa and its long term growth trend is positive. International tourism growth was robust until the political violence of December 2007 and early 2008 saw arrivals drop by almost half, from the 2007 record of over 2 million arrivals. Europe is the main source for international tourism, with the United Kingdom the largest source market.

These, together with the high spending United States market and in particular new emerging markets, were the targets of the Kenya's Tourism Marketing Recovery Programme, supported by the European Union. The first phase of the recovery programme related to press and travel trade targeting. The second phase, with a budget of €3 million, delivered the following activities:

- ✓ Development through an advertising agency tender, of an integrated campaign concept and plan.
- ✓ Production of campaign material and media placement.
- ✓ Source market targeted campaign on electronic media, print, outdoor and online options.
- ✓ Monitoring and evaluation

The campaign theme was Jambo! Meaning "welcome" and pictures of ordinary Kenyans were strongly featured to counter negative publicity regarding post-election communal violence.

Rationale and

Immediately following the campaign tourism numbers recovered to pre-election

justification for project	levels, illustrating the resilience of Kenya's tourism appeal. Strongest growth came from new markets (India, South Africa).
Details of project planning, development and operation	The project was managed by the Kenya Tourist Board's research and marketing departments, tendering and managing a professional advertising agency. The European Union also provided a technical adviser and monitoring support.
Key success features and practices	✓ Professional campaign planning and recovery ✓ Emphasis on in-market research ✓ Tourism recovery
Sources of information	Interview with Robert Travers, EU adviser, August 2013. http://www.travelweekly.com.au/news/kenya-reports-tourism-recovery

3. TOURISM PRODUCT DEVELOPMENT AND MARKETING STRATEGIES IN THE COMCEC MEMBER COUNTRIES

3.1. COMCEC MEMBER COUNTRIES' TOURISM PERFORMANCE

The members of COMCEC consists of 57 states in three sub-regions: the Africa sub-region with 17 countries, the Arab sub-region with 22 countries and the Asia sub-region with 16 countries, with an additional two members – Guyana, Suriname – outside these regional groupings.

Of these countries, 21 are classified by the UN Economic and Social Council as Least Developed Countries: 13 in the Africa sub-region, 6 in the Arab Group and 2 in the Asia Group.
Listings of COMCEC member countries by region and stage of development are given in Appendix 2.

International tourism activity in the COMCEC region grew between 2005 and 2010 by 45% and 62% respectively in respect of arrivals and receipts, reaching 152 million international tourist arrivals and $116.7 billion international tourism receipts. COMCEC countries' share of global tourism rose by 3 percentage points to 16.2% of arrivals and from 10.6% to 12.6% of receipts during this five-year period[27].

Data for 34 COMCEC countries in 2011 show a further aggregate rise of 6.4% in arrivals (as against the worldwide rate of 4.8%), though receipts declined by 6.6%, largely as a result of the disruption in North African states. International arrivals and receipts data for 2012 are available only for 8 COMCEC countries. These show aggregate growth exactly in line with the world figure of 4% both for arrivals and receipts[28].

In 2010, the leading 10 COMCEC countries (i.e. Turkey, Malaysia, Saudi Arabia, Egypt, Morocco, the United Arab Emirates, Indonesia, Syria, Tunisia and Kazakhstan in order of tourist arrivals) accounted for over 80% of international arrivals in the region. Between 2010 and 2011, the volume of international tourist arrivals in the top ten COMCEC destinations rose from 123 million to in excess of 126 million but with Syria being replaced by Lebanon the total fell back slightly to 123.3 million in 2012.

International tourism receipts in the top ten COMCEC countries (i.e. with Lebanon and Jordan replacing Syria and Kazakhstan) totalled just over $100 billion in 2010, but declined slightly to $98.9 billion in 2011, as a result of a sharp fall in receipts in Egypt. The 2012 figure for Lebanon is not yet available but for the remaining nine countries, aggregate receipts from

[27] Tourism Outlook 2013. COMCEC Coordination Office.
[28] UNWTO Tourism Highlights, 2013 Edition. UNWTO.

international tourism rose from $92 billion in 2011 to over $94 billion in 2012, fuelled principally by strong growth in the United Arab Emirates[29].

International tourism activity contributes most, in terms of proportion of gross domestic product and share of exports, in COMCEC countries that have relatively small economies. In Maldives, tourism receipts accounted for 30% of GDP between 2005 and 2010, and for over two-thirds of the value of exports; for seven other COMCEC countries (Lebanon, Jordan, Gambia, Morocco, Syria, Tunisia and Egypt) it contributed at least 5% of GDP over this period; and for nine countries other than Maldives (i.e. Lebanon, Albania, Comoros, Palestine, Gambia, Jordan, Morocco, Egypt and Uganda) it made up at least 20% of exports[30].

Though UNWTO records tourism activity as accounting for 8% of exports in Least Developed Countries, the average for COMCEC countries is lower at 6%, and for most COMCEC countries tourism's contribution is negligible.

The share of intra-COMCEC tourism in total international tourism activity in COMCEC countries has shown a decline since 2007 from 36% of arrivals to just under 31% in 2010, and from 33% of receipts to 29%[31]. There are a range of reasons for this trend, the most important of which is the fact that the COMCEC countries with dominant tourism sectors like Turkey, Malaysia, Indonesia, Egypt, and Tunisia successfully targeted tourists from western countries for resort-based holidays during this period.

Asian Islamic states have experienced continued expansion in tourist arrivals over the past decade, while growth in the OIC- MENA (Organization of Islamic Countries - Middle East and North Africa) sub-region has slowed down, and tourism activity in the Sub-Saharan Africa sub-region remains small. The OIC - MENA countries exceed those of the OIC – Asia sub-region as a result of the higher spend per arrival[32].

In the **Asia sub-region**, the best performing COMCEC member countries in terms of international tourist arrivals in 2012 were Turkey (up 3% to 35.7 million, thereby consolidating its sixth position in the global league table for international tourist arrivals), Malaysia (up 1.3% to 25 million (though a large portion of Malaysia's arrivals relates to cross-border traffic from Singapore), and Indonesia (up 5.2% to 8 million). Other strong performers in 2012 in terms of growth rate in the Asia grouping of COMCEC countries, and for which data are available, were Azerbaijan (up 27% to just under 2 million, boosted by hosting the Eurovision Song Contest), and Kazakhstan (up 8% to 4.4 million)[33].

In overall terms, Africa increased international arrivals by an estimated 6% overall in 2012, the second fastest growth by region after Asia and the Pacific. With 3 million more tourists, the region exceeded the 50 million mark for the first time ever, reaching a total of 52 million. International tourism receipts in the countries of the region increased by 6% in real terms to

[29] UNWTO Tourism Highlights, 2013 Edition. UNWTO.
[30] Statistical, Economic and Social Research and Training Center for Islamic Countries -SESRIC, 2012
[31] Statistical, Economic and Social Research and Training Center for Islamic Countries -SESRIC, 2012
[32] Tourism Outlook 2013. COMCEC Coordination Office. April 2013
[33] UNWTO Tourism Highlights, 2013 Edition. UNWTO.

US$ 34 billion. The region maintained a 5% share in the world's total arrivals count and 3% in receipts. Among, COMCEC **Africa sub-region** members, Tunisia (up 24% to just under 6 million) started to recover from the negative demand trends following the Arab spring transition, and Cameroon saw a 35% increase to 817,000 arrivals. Significantly a number of the Least Developed Africa sub-region country members of COMCEC also fared well, albeit from low starting volumes. 2012 international arrivals rose by 14% in Sierra Leone, while 2011 growth rates above the regional average were achieved in Togo, Uganda, Gambia, Senegal, Niger, Sudan, and Benin[34].

International tourist arrivals in the Middle East are estimated at 52 million in 2012. The region experienced a 5% drop in arrivals due to continued tensions in some of its destinations. In international tourism receipts, the region's decline was limited to 2% in real terms, with earnings totalling US$ 47 billion. The region has a 5% share in total world arrivals and 4% in receipts[35].

The region showed some very mixed results by destination. Among the COMCEC **Arab Group** countries, the largest destination Saudi Arabia reported a 22% fall, as it could not consolidate its outstanding 61% increase recorded in 2011. Egypt experienced a sustained rebound (up 18% to 11.2 million) after the decline of 2011. Palestine (up 9% to almost half a million arrivals) and Jordan (up 5% to 4.2 million arrivals) rebounded as well. The United Arab Emirate of Dubai (up 10% to 9 million arrivals) continued to grow at a sustained pace, while Oman and Qatar also benefited from strong demand. Lebanon (-18%) is still suffering from the conflict in neighbouring Syria[36].

An increasing ease and availability of travel options is fuelling the tourism boom. This is particularly prominent in the airline industry where the Middle East has emerged as a dominant hub. The growth in low cost carriers has been important in Europe and Asia.

Though COMCEC countries fare poorly in the World Economic Forum Travel and Tourism Competitiveness index, with only four members in the top 50 worldwide (i.e. United Arab Emirates, Malaysia, Qatar and Turkey)[37], it is clear that they have the "potential for the development of a sustainable tourism sector". However, for that to be sustained and consistent across all COMCEC countries, they need "to better engage in the long term global tourism market trends and build sound tourism policies in order to improve competitiveness in the sector."[38]

[34] UNWTO Tourism Highlights 2013
[35] UNWTO Tourism Highlights 2013
[36] UNWTO Tourism Highlights 2013
[37] The Travel and Tourism Competitiveness Report 2013. World Economic Forum.
[38] Tourism Outlook 2013. COMCEC Coordination Office. April 2013

3.2. COMCEC MEMBER COUNTRIES' APPROACHES TO TOURISM PRODUCT DEVELOPMENT

In examining the approaches adopted to tourism product development by the COMCEC Member Countries, the following elements are discussed:

3.2.1. INSTITUTIONS/ORGANISATIONS

As shown in Appendix 1, all COMCEC Member Countries have a government ministry or department responsible for tourism. The exact role and range of responsibilities vary from simply administration/regulation to the full range of administration, policy/strategy/planning, management and marketing of their country's tourism sector development. Though tourism operations predominantly involve private sector investment and management, the tourism sector is regulated, planned and facilitated by governments throughout the COMCEC region.

COMCEC Member Countries with the most highly developed tourism sectors like Turkey and Malaysia have fully integrated ministries handling all aspects of tourism. The importance of tourism to their economies enables the tourism ministry to work with other government ministries, departments and agencies from a position of strength. They apply sophisticated and comprehensive approaches to the study and selection of priorities for future tourism and market development. They have tourism departments within the ministry designated for tourism – whether that body is a stand-alone entity or linked with another area of government – where present tourism development and operation is managed and future strategies and directions are planned and coordinated. As demonstrated through the case studies for Turkey, Malaysia and Maldives, clear directions for the future development of tourism are communicated in official documentation and media announcements. This is the case in over half of the COMCEC Member Countries.

Even for those COMCEC Member Countries with less well-advanced tourism sectors, government recognition of the potential role of tourism in economic development is generally high. They face two main difficulties:

- the vital integration of tourism development in aspects that involve other government bodies can be difficult, necessitating the establishment of an inter-ministerial coordinating system such as Bangladesh has put in place with its National Tourism Council; and
- the shortage of the technical, human and financial resources needed to translate policies into coherent plans and implementation programmes that attract the necessary investment and communicate effectively to prospective tourist markets.

A number of COMCEC countries, mainly in the Asian sub-region, have established tourism development corporations both to undertake tourism developments (mainly in the form of accommodation) and to facilitate private sector investment in tourism product development.

Examples include Pakistan[39], Iran[40] and, most recently Nigeria[41]. Other countries have established national tourism offices as part, or under the direction, of the Ministry as specialist bodies to oversee and facilitate private sector investment, and to undertake destination marketing e.g. Bangladesh[42], Gambia[43] and Guyana[44].

Destination marketing is an area where there is considerable variation of approach. While private sector businesses have the responsibility for attracting their own clientele, it is widely accepted that governments play a central role in creating a positive image of the destination in tourist markets. There are two reasons, however, why it is normal for governments to consult with, and seek the direct involvement of, representatives of tourism businesses in developing destination tourism marketing strategies and undertaking marketing and promotional campaigns, namely:

1. the tourism private sector has detailed knowledge of market trends and systems of operation of the tourism distribution system, and
2. it directly benefits from destination marketing.

In order that destination marketing has the full support of the tourism private sector, a number of COMCEC countries undertake their marketing through specialist bodies either under the auspices of the Ministry or chaired by the Minister with membership drawn across both the public and private sectors e.g. the Maldives Marketing and Public Relations Corporation[45], Jordan Tourism Board[46].

Increasing numbers of COMCEC Member Countries are developing meetings, convention and exhibition centres and are marketing these through the designated marketing bodies. In order to target the MICE (meetings, incentives, conventions, exhibitions) tourism sector, many city destinations use convention and visitor bureaus (jointly funded by one or other or a combination of government subvention, hotel taxes and private membership) in many destinations. This model has started to be adopted in COMCEC Member Countries in its large cities e.g. Jakarta Convention and Visitors Bureau, Indonesia[47], Azerbaijan Convention Bureau[48].

[39] http://www.tourism.gov.pk/about_ptdc.html
[40] http://www.ir-tdc.ir/
[41] http://www.tourism.gov.ng/
[42] http://www.tourismboard.gov.bd/
[43] http://www.foroyaa.gm/know-your-public-institutions/12464-gambia-tourism-board
[44] http://www.guyana-tourism.com/
[45] http://www.visitmaldives.com/en
[46] http://www.visitjordan.com/
[47] http://www.jcneb.com/
[48] http://www.azerbaijan.travel/en/news-view/1/1414

3.2.2. Policies and Planning Strategies and Systems

3.2.2.1. Tourism Policies

The survey of national tourism administrations for this Study into the policies established for the development of the tourism sectors of COMCEC Member Countries indicates that the key emphases are on:

- sustainable and responsible development that benefits both the overall economy and local communities while protecting the natural environment and avoiding socio-cultural disruption ,
- diversification of both products and markets to avoid over-dependence on a limited product offering and/or market appeal and to reduce seasonality,
- innovation, originality and authenticity in the types of tourism product developed,
- regional tourism development within the destination to broaden the socio-economic benefits of tourism to as large a proportion of the population as possible.

While the principles of sustainable development to benefit local societies apply widely across all COMCEC Member Countries, there are variations in other priorities and objectives according to the stage of development of their tourism sectors.

Countries with major tourism sectors

For countries with established tourism sectors (see listing in Appendix 2), the emphasis in tourism policy, while meeting the three bottom line objectives of economic benefit, environmental preservation and socio-cultural protection, is on the aspects of:

- diversification of product offer, and market appeal (e.g. Turkey's plan to develop its health and thermal tourism and winter sports sectors[49], and
- regional development within the country to spread the economic benefits across a wider proportion of the population (e.g. Maldives – see case study 4.1.3).

Note that countries may be categorised as having a major tourism sector when their inbound tourism is lower than others but where tourism constitutes a high proportion of the country's GDP, such as in the case of Maldives.

Countries in the growth stage of the tourism area life cycle[50]

An examination of mission and policy statements for countries in the growth stage of the tourism area life cycle (See listing in Appendix 2) indicates a commitment to a controlled pursuit of the economic benefits to be gained from tourism. This indicates the realisation that unfettered and unplanned expansion can result in high economic leakages (through the need to import goods demanded by tourists, and dependence on foreign personnel), as well as environmental degradation and damaging impacts on the host population social and cultural mores.

[49] http://www.kulturturizm.gov.tr/genel/text/eng/TST2023.pdf)
[50] The Concept of a Tourist Area Cycle of Evolution. Butler, R.W. (1980). Canadian Geographer.

The need to achieve balanced development of the sector so that growth is realised that meets the demands of tourists while bringing strong benefits to the country is borne out in mission statements of the following three countries selected from the COMCEC sub-regions:

Bahrain:
To develop an innovative, dynamic and sustainable tourism industry that is flexibly responsive to customer preferences, community values and business needs, contributing strongly to the socio-economic development of the Kingdom of Bahrain[51].

Brunei Darussalam:
To act as a catalyst for change and to grow a sustainable, socially and environmentally responsible tourism industry for the benefit of the nation[52].

Gambia:
The Gambian Tourism Authority is dedicated to give the tourist a uniquely rewarding experience through an integrated high quality product/service offering that would promote responsible and valued partnerships in tourism for the socio-economic benefit of the Gambian people[53].

Countries in the early stage of tourism development

Those COMCEC countries which have not yet reached the stage in the tourism area life cycle of sustained growth (see listing in Appendix 2) tend to focus on product developments of limited scale with strong emphasis on community benefits and participation. Many are clearly determined to avoid what they see as mass tourism.

This is particularly the case for Africa sub-region COMCEC countries like Gabon which fear that large scale tourism would have a damaging impact on the environment and local culture. It wishes, instead, to develop high quality tourism, which protects nature and people, preserves biodiversity and the culture of local population groups, and which in turn contributes high added value to Gabon's economic and social development[54].

3.2.2.2. The Planning Approach

The use of the long term comprehensive master plan for tourism has been criticised on the grounds that the market and operating environment for tourism is subject to very many influences and exogenous variables (as illustrated in section 1). These can fluctuate year-on

[51] http://www.moc.gov.bh/
[52] http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/brunei_presentation_2.pdf
[53] http://www.visitthegambia.gm/about-gta.html
[54] http://www.en.legabon.org/keys-sectors/tourism-and-ecotourism/presentation - sthash.wjiAamGq.dpuf

year so that any detailed plan beyond a few years ahead can become outdated and inappropriate[55].

Though the term "master plan" is still commonly used in both COMCEC and non-COMCEC countries, in practice these plans provide goals and strategies by which these will be achieved through the identification of the types, phasing and geographic areas within the country for tourism development. The value of a long term perspective is that it can:

- provide an indication of intent, and guidelines, for interested investors and developers, and
- deter them from undertaking developments that prove sub-optimal or even counter-productive for the country.

The need for this long term planning guideline and framework is equally strong wherever the destination is on the tourism area life cycle. It serves to channel future development in line with the destination's objectives and, particularly important for countries in the early stages of tourism growth, it shows prospective investors the types of opportunity that will be appropriate and supported.

The practice of issuing directions for the mid-and-long term development of the tourism sector is the norm for many COMCEC Member Countries, whether with established tourism sectors or with tourism in its early stage of development. These can give guidance on the scale and location of tourism development (i.e. zones), institutional arrangements and support, legislation and regulation, quality standards, and human resource development.

In many cases this guidance takes the form of strategic (or what are referred to as "master") plans. However, in other cases (typically countries in the early stages of tourism development) the framework and goals for future tourism development come in the form of a government paper or through policy and strategy statements from the tourism ministry.

Leading COMCEC tourism destinations

In the case of COMCEC countries, the long term strategic plan is then followed up through area development or tourism type thematic plans with a shorter time horizon – of up to five years.

Taking the leading COMCEC tourism destinations of Turkey, Malaysia, Saudi Arabia, Egypt, the United Arab Emirates, Indonesia, Tunisia, Kazakhstan and Lebanon, the development plans in place are as follows:

- **Turkey** is following a comprehensive and integrated tourism development strategy which has "the primary objective of guiding the travel and tourism industry at production management and implementation phases, by putting forth a roadmap for the sector"[56]. This overall plan is being supplemented and taken to a more detailed

[55] Master Planners & Master Planning: Tourism Planning & Development in the Third World. Peter M. Burns. University of Surrey. 1998

[56] http://www.kulturturizm.gov.tr/genel/text/eng/TST2023.pdf

stage through regional plans (e.g. South Anatolia, Eastern Black Sea) and thematic plans (e.g. thermal tourism, health tourism).

- **Malaysia:** Malaysia Tourism Transformation Programme, Five Year Tourism Development Plan for Langkawi announced in 2012 budget, Sabah Tourism Master Plan 2011 -2025, National Eco-tourism Plan, Rural Tourism Plan, and various other regional plans
- **Saudi Arabia:** National Tourism Development Project to 2020, regional development plans
- **Egypt:** National Sustainable Tourism Strategic Master Plan to 2020, regional development plans
- **United Arab Emirates:** Dubai Tourism Vision for 2020, Abu Dhabi Vision 2030 Master Plan/Economic Vision 2030/Urban Planning Vision 2030 (all contain tourism elements), Yas Island Master Plan
- **Indonesia:** Masterplan for National Tourism Development aiming to develop 50 national tourism destinations by 2050, to be carried out in conjunction with the Master Plan for the Acceleration and Expansion of Indonesian Economic Growth
- **Tunisia:** Tunisia Tourism Strategy for the Year 2016
- **Kazakhstan:** State Program of Industrial –Innovation Development to 2014 (includes a tourism section), Tourism Master Plan for South Kazakhstan, Master Plan of the national tourist cluster on the international highway “West Europe-West China”
- **Lebanon:** Study on the Integrated Tourism Development Plan (prepared in 2003/4), preparation of Baalbek and north Bekaa region tourism master plan announced March 2013

Asian sub-region

Asian sub-region COMCEC countries outside the leading ten COMCEC tourism destinations that have current (or recent past) tourism strategic master plans include: Albania (2007-2013), Brunei Darussalam (5 year implementation plan from 2012), Iran (for Kish Island to 2025), Maldives (4th Tourism Master Plan, 2013-2017), Turkmenistan and Uzbekistan.

Arab sub-region

Though all COMCEC Arab Group countries have issued strategic guidance for future tourism development, the incidence of detailed tourism strategic master plans is limited to the following: Algeria (Framework Plan for the Development of Tourism to 2025), Iraq (10-year UNESCO Tourism Framework Plan), Jordan (25-year Master Plan), Kuwait (updated five-year plan to 2017), Oman (proposed 30-year Tourism Master Plan under tender), Palestine (Bethlehem Tourism Master Plan), and Qatar (Tourism Development Strategy Plan in finalisation).

Africa sub-region

Similarly, in COMCEC African Group countries though all tourism ministries have established policies and strategic goals for the future tourism development, there are under half the member countries with long range planning frameworks, these being: Cameroon (at planning stage), Gabon (as part of a national infrastructure plan), Gambia (Gambia Tourism Development Plan to 2020), Mozambique (regional plans), Nigeria (Tourism Development Master Plan 2006-2015), Senegal (new plan currently in preparation), Togo (Master Plan for Tourism Development to 2018 under preparation), Uganda (currently in preparation).

The existence of plans does not guarantee success development. There are two fundamental requirements to be met for plans to have a chance of coming to fruition: stakeholder support, and an implementation plan (incorporating investment goals and procedures). These issues are discussed in the next two sub-sections.

3.2.2.3. Full stakeholder consultation and community involvement

Unless the full range of stakeholders in tourism development and operation are in agreement with tourism development plans, they are unlikely to give their full support. This support can best be achieved by full and effective consultation with all stakeholders in the preparation of the plan, with their views and ideas that are valid and add benefit to the plan incorporated within it.

Government players at central, regional and local level are all significant players in tourism development. The opinions and needs of private sector investors, developers and operators – existing and prospective, local and international – are important. It is also of the utmost importance for planned tourism developments to be acceptable to the communities where it is planned to take place. This is particularly vital in new destinations where the population has limited experience or knowledge of tourism, a point that is of relevance to over half COMCEC Member Countries.

The example of Algeria represents a good model of establishing a integrated approach to tourism development with wide stakeholder buy in. It has prepared its Framework Plan for the Development of Tourism to 2025, with all stakeholders (including local communities) participating at the country's second National Tourism Conference in March 2013 and the associated workshops. This resulted in the validation of a vision and the creation of a strategy for the harmonious and sustainable development of the tourism sector[57].

3.2.2.4. Attracting Investment

Development plans are of limited use in their own right: the key to successful development lies in their implementation. An action plan outlines the specific tasks to be undertaken according to:

- Agencies responsible - principal and supporting,
- Phasing – short (one year), medium (years 2 and 3) and long term periods, and
- Associated budgets.

Many of the actions will be dependent on private sector investment. Prospective investors require the government of a destination to show proactive support for new tourism product

[57] http://nationalalgeriancentre.com/category/news/tourism/

development through clear strategic guidelines for the sector, a product portfolio of opportunities and an investment plan.

A perpetual difficulty for destinations seeking to build up their tourism sectors is attracting investment. Tourism developments, by virtue of requiring high upfront capital costs with only a slow build of demand and revenues, typically have poor return on investment in the early years of operation.[58] This reluctance to invest in tourism is exacerbated in countries in the early stages of tourism development (such as many COMCEC African region members), or where the overseas investor community is deterred by regional unrest (as in the COMCEC Arab region).

The difficulty can be tackled in a variety of ways:

- an investment code that provides incentives and other inducements to overcome prospective investors' financial or other misgivings;
- assistance through international and bilateral agencies, including collaboration with investment groups and tourism development agencies from fellow COMCEC Member Countries.

Examples of the approaches being adopted by individual COMCEC countries are discussed in the following two sub-sections.

Investment Code and Incentives

A destination's ability to attract tourism product investment from foreign or local sources is a function both of the performance and prospects of the tourism sector and the investment climate (i.e. organisation, framework, regulations, sources of finance and conditions of accessing finance, fiscal systems and the existence of special incentives.)

The investment programme identifies the separate needs of the private investment community, the not-for-profit sector and the public sector. It will draw on best practice and economic analysis to deliver detailed and costed proposals for the proposed product developments. The costs and benefits of providing tax and other incentives for tourism investors are assessed related to the amount of private sector investment likely to be generated by their availability. This is necessary for each tourism development area related to the level and mix of investment required.

In most COMCEC Member Countries, there is a government department responsible for, and which offers a range of incentives for selective forms of investment. In tourism, the most extensive range of incentives is offered by the Malaysian Investment Development Authority which offers tax incentives for hotel businesses, tourist projects including indoor and outdoor theme parks, construction of holiday camps, recreational projects, the construction of 3,000+ capacity convention centres, healthcare travel and the luxury yacht industry. In addition, it

[58] Handbook on Tourism Product Development. UNWTO & ETC. 2011

allows double deduction on expenses for overseas promotion, approved trade fairs as well as tax exemption for tour operators and car rental operators[59].

In the developing countries of the COMCEC Arab Group, much investment is funded from within the country or from fellow Arab countries.

Saudi Arabia is investing over SR7 billion (US $1.9 billion) in 2013 on tourism and heritage projects in the various regions of the Kingdom, including rehabilitation of tourist and heritage sites, roads, tourist cities, parks, gardens, museums, and airport expansion. The value of private sector projects in the form of commercial and recreational complexes, resorts, hotels, exhibitions, festivals and private museums adds a further SR3.5 billion (US $0.95 billion)[60].

Bahrain's sovereign wealth fund, Mumtalakat, plans to invest $42 million in tourism and hospitality schemes in 2013[61]. Nonetheless, investment incentives for targeted tourism developments are offered in countries like Lebanon[62], and Jordan[63].

A mid-scale COMCEC tourism destination in the Africa sub-region, Gambia, also offers a substantial range of tourism investment incentives covering ecotourism (national heritage and others), upcountry tourism (motels, tourist camps, sport fishing, river cruising), and 4/5 star hotels as part of its drive to diversify and increase the quality of its tourism product offering. Other COMCEC African countries, particularly falling in the least developed country category, offer investment incentives but without identifying special inducements for tourism and hospitality investments e.g. Mali [64].

An example of a least developed country in the COMCEC Africa Group with a targeted investment incentive programme for tourism product development is Mozambique. The Mozambique Tourism Anchor Investment Program, a joint initiative of the government of Mozambique and the International Finance Corporation (IFC), aims to capitalize on the country's natural beauty to attract private investment and propel economic growth. The Anchor program identifies, packages and markets investment opportunities in the country's tourism industry. It has already identified and secured land titles for four sites and is marketing its concept for tourist resorts to potential investors. The program is also working to improve the business environment in Mozambique to make it easier to invest in the tourism sector[65].

59 http://www.mida.gov.my/env3/index.php?page=tourism-industry
60 http://www.ameinfo.com/saudi-arabia-investing-sr7bn-tourist-projects-346435
61 http://www.gulfbusiness.com/2013/03/wealth-fund-mumtalakat-eyes-150m-bahrain-invetsment-in-2013/ - .UgyzOVIqLcp
62 http://www.idal.com.lb/en/sectora_in_focus/tourism
63 http://www.jordaninvestment.com/JordanataGlance/FavorableBusinessEnvironment/IncentivesTaxExemptions/tabid/78/language/en-US/Default.aspx
64 http://www.apimali.gov.ml/api/en/index.php?page=benefits-of-the-code
65 http://www.tourisminvest.org/Mozambique/

Role and involvement of international and bilateral agencies

Financing and technical assistance is obtained from international organisations, both from within the Islamic community (e.g. Islamic Development Bank), and through international agencies such as the World Bank, International Finance Corporation, UN Industrial Development Organization, and the UN World Tourism Organization. Overseas aid programmes of industrially developed countries of Europe, North America and Asia are also active in supporting tourism project development, particularly in the least developed countries of Africa.

Among the international agencies, UNWTO through its technical assistance programmes and the ST-EP initiative (in 11 African COMCEC Member Countries), UNESCO in respect of cultural and heritage, UNDP, UNCTAD and UNEP are all active in tourism. At the bilateral level, all industrialised countries have aid donor programmes with projects in the area of tourism. A major ST-EP project is assisting in sustainable tourism development in a network of cross-border national parks and protected areas in ten west African countries (with support from KOICA - Korea); while the Italian Government is working through ST-EP on a multi destination marketing programme for eight countries in the same region and the Dutch Government (SNv) is helping Cameroon with the development of a network for promotion and capacity building for running bird watching tours.[66]

3.2.3. PRODUCT TYPES

3.2.3.1. Common Approaches

The patterns and priorities of tourism product development in the COMCEC countries broadly mirror those in other countries, the main determining factor being the stage of development of the economy in general and the tourism sector in particular, and the type of socio-political system being followed. In other words, countries with well-established tourism sectors seek diversification and the fuller spread of the benefits of tourism to all sections of their population, whether they are COMCEC members or not. Similarly, the focus of tourism development in all least developed countries is on their natural and cultural resources in order to bring benefits to local communities.

A number of clear trends come through from the analyses of COMCEC country tourism product development strategies. All COMCEC countries share the requirement for their tourism product developments to be **sustainable** (i.e. economically, environmentally and socio-culturally).

For the Least Developed Member Countries in the Africa sub-region of COMCEC, and other member countries in the development phase of tourism receiving up to a level of half a million tourists a year, a second common element in their tourism product strategies is the growing

[66] UNWTO ST-EP Programme. http://www.step.unwto.org/

attention to **responsible tourism** i.e. tourism that "creates better places for people to live in, and better places to visit"[67] (see explanation in sub-section 1.1.). As such responsible tourism goes beyond sustainable tourism in that the focus is on the local population of the destination, as stipulated in the Cape Town Declaration.

A third common feature of tourism product development is the **increasing number of types of tourism product development** exploiting a wider range of the resources and assets of destinations to cater for a greater number of market segments and niches. The range of tourism products being developed around the world is constantly growing in line with the splintering of market interest in different types of features and activities. In response to the availability of detailed information in specialist publications and online sources, tourists have become more fragmented in terms of their interests. This trend provides opportunities for destinations to create tourism products/experiences about a specific feature or resource of distinction and distinctiveness.

3.2.3.2. Product Categories

The review of tourism development strategies and plans of COMCEC Member Countries indicates that there are ten broad tourism product categories that the 57 COMCEC Member Countries are variously seeking to encourage and facilitate at present.

These are:

1. Nature/Ecotourism
2. Cultural Heritage
3. Community-based/Rural
4. Sports & Activities
5. Urban/City
6. Business & MICE
7. Medical, Health & Wellness
8. Events & Festivals
9. Cruise & Inland Waterways
10. Beach & Marine

In addition, since products should "match" the tastes and requirements of the market, there are instances where the products offered to different market segments have to be shaped and adjusted for the specific needs of these different consumer groups. Separate examination of the product development approaches adopted in COMCEC countries are indicated, therefore, for:

- Domestic tourists
- International tourists.

Each of the ten product categories and market sources are discussed in the following paragraphs.

[67] http://www.responsibletourism.mn/

Nature/Ecotourism

The development of tourism products based on the destination's natural environment is a good example of how a tourism product has evolved from being presented as a broad set of experiences in a destination to offerings that are now increasingly specialised by activity and interest. There are both "soft" ecotourism experiences (largely passive, sightseeing-based, and gentle physical activity) and "hard" adventure nature-based pursuits where tourists obtain their satisfaction from physically demanding pursuits and close encounters with the natural features in which they are interested.

This trend is increasingly recognised by all destination planners, and is of special relevance to countries in the developing world whose competitive strength are their natural resources heritage that permit them to develop products and experiences that cannot be replicated by more established tourism destinations. This is particularly relevant for the Least Developed Member countries of COMCEC, as illustrated by the wide diversity of product development assistance being received through aid programmes e.g. bird watching, local handicrafts, elephant viewing, village tourism. This form of development has the virtue of using what exists without huge investment in built or other facilities. Almost all the COMCEC Africa Group of countries are following this route of tourism product development.

Cultural Heritage

The development of tourism products and experiences related to a destination's cultural heritage again has two distinct strands:

- local, community-based, hands-on experiences for tourists watching and experiencing local crafts, skills, music and dance. This is a prime way of providing the increasingly demanded direct access to the people of the countries visited and involving relatively small capital investment, and
- prestigious presentations through cultural centres, museums etc reflecting the rich traditions of Islamic heritage.

As in the case of ecotourism, cultural tourism products developed in, and by, local communities are an low capital intensive way of bringing direct benefit to the population. Indeed, the National Geographic has categorised the tourist market segments interested in both the nature and culture of the places they visit as *geotourists*[68].

Again, most of the Least Developed countries within COMCEC membership have established local level cultural activities and performances, demonstrating traditional arts and crafts, and inviting visitors to participate in life skills such as animal tracking, river rafting, fishing, and hunting.

The creation of handicraft centres where tourists can both practice making local crafts and making souvenir purchases is another way of both transferring knowledge about the destination's culture and generating income for the residents of the area.

[68] http://travel.nationalgeographic.com/travel/sustainable/pdf/geotourism-charter.pdf

At the other end of the scale, for the more financially endowed countries, there is a trend to develop centres of excellence that demonstrate the rich cultural heritage of Islamic countries e.g. the Qatar Museum of Islamic Art and the Katara Cultural Center[69].

There is an abundance of World Heritage Sites in the COMCEC region i.e. 178 of the total of 891 such sites worldwide. These sites are spread across 46 of the 57 COMCEC states. These represent major potential for tourism product development both in respect of tourist services and, via backward linkages, supplies to tourism operators bringing visitors to these sites.

Another important aspect of the culture of a destination that increasing volumes of tourists enjoy is the foods dishes making up the cuisine of the destination. As well as restaurants offering the range of local dishes, culinary demonstrations and course are offered in destinations like Malaysia and Indonesia.

Community-based/Rural

Community-based tourism – tourism that is initiated and controlled by local communities – is being increasingly adopted as a sustainable and responsible form of tourism product development. This is seen as an appropriate strategic approach for countries with limited financial resources to develop high cost infrastructure and limited drawing power to attract investors for major tourism facilities. The listing of common types of community-based attraction and activity products fall into four categories[70]:

1. single activity or objects/daily chores/production/products
2. culture tours/walks/visits/events/classes
3. nature/wildlife/outdoor activities
4. significant sites

Virtually all these community-based tourism products are expressions of a destination population's natural and cultural heritage and daily life traditions and skills, so overlap to a considerable extent with the ecotourism and cultural tourism product developments discussed above.

The relevance of community-based tourism for COMCEC countries is at both ends of the development scale. For the least developed countries, community-based tourism represents the means by which tourists discover and experience new destinations. For destinations with growing or developed tourism sectors, community-based tourism products constitute a diversification and refresh the destination's perception in the marketplace. In order that communities can play their role in planning community-based tourism effectively, governments and technical assistance agencies are needed to facilitate and lead capacity building and community empowerment for successful community-based tourism product development.

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[69] http://www.mia.org.qa/ and http://www.katara.net/

[70] Proceedings of the 1st Meeting of the COMCEC Tourism Working Group. A New Trend in Sustainable Tourism Development: Community-Based Tourism in the COMCEC Region. COMCEC Coordination Office. May 2013.

Best practice examples of tourism product development led by local communities but which have brought in other stakeholders to provide improved access, technical assistance and micro finance occur in many parts of the world include:-

- Kyrgyz Community Based Tourism[71],
- Buhoma Village Walk, Uganda[72],
- Manda Wilderness, Mozambique[73]
- Benin – case study 4.1.8 (Benin – value chain analysis and backward linkages), and Eco-Benin, a not-for-profit, community-based organisation developing and supporting eco-tourism programmes in 12 remote villages of Benin[74].

Sports and Activities

The growing realisation of the benefits of physical activity in maintaining good health is leading to the development of adventure and active recreational tourism products. This trend is closely allied to the growing interest and demand for nature-based tourism, and is being exploited by COMCEC Member Countries at all stages of their tourism development. Desert safaris are increasingly offered in the countries of the Arab sub-group e.g. Algeria, United Arab Emirates (Dubai). Jungle and inland safaris are offered by African and Asian sub-group countries such as Nigeria, Uganda, Gambia and Brunei Darussalam.

Sports tourism is also being increasingly embraced by COMCEC Member Countries. Developments take the form of competitions, with countries like Qatar, United Arab Emirates (Dubai) and Bahrain in the Arab sub-group, hosting rounds on international events in sports as varied as tennis, golf, Formula 1 motor racing, Moto GP motor cycle racing, bicycle racing, and UIM Class I powerboat racing. Qatar will host the FIFA soccer World Cup in 2022, for which it is developing an extensive range of tourism products and services for the crowds that will attend the championship. It has also developed the Aspire Zone which provides training facilities used by leading clubs from around the world, as well as operating training courses (see Case study 4.1.7.)

Urban/City

The COMCEC countries have many of the world's richest cities in terms of cultural heritage which act as a magnet for tourists, and by so doing provide extensive entrepreneurial opportunities for the local population e.g. Istanbul attracts 10 million visitors a year. Recent developments to extend the attraction of major cities for tourism include the creation of major shopping malls such as in Dubai and Kuwait, and prestigious cultural heritage features such as the Museum of Islamic Art in Doha, Qatar. A particular attraction for tourists from Middle East and Gulf States and Asian markets is the contrast between traditional souks and modern shopping malls, with international branded goods.

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[71] http://www.cbtkyrgyzstan.kg/
[72] http://kabiza.com/Buhoma-Village-Walk-Bwindi.htm
[73] http://www.mandawilderness.org/home_c.html
[74] http://www.ecobenin.org/

Business/MICE

The economies of COMCEC Member Countries are growing at a faster rate than the global average and, in consequence, are attracting extensive business traffic. Most cities in the COMCEC region have developed tailor-made convention and exhibition venues, and have hotels and resorts that provide their own conference facilities. A key part of their tourism marketing strategy is devoted to the MICE (meetings, incentives, conferences, events) segment, and as indicated in section 3.2.1, more COMCEC Member Countries have identified MICE tourism as a major form of tourism to be encouraged through a dedicated marketing agency.

Oman is an example to be targeting the MICE sector strongly. In addition to existing facilities, it is constructing the Oman Convention and Exhibition Centre in Muscat in two stages: a 22,000 square metre exhibition space by 2015, and a 3,200 seat auditorium in a complex with four hotels, a shopping mall, 200 serviced apartments, office and exhibition space by 2016[75].

Medical, Health & Wellness

The development of tourism products geared towards both the treatment of medical conditions and services designed to help the general feeling of wellbeing is a major trend in tourism product development in the COMCEC region. Health tourism in Islamic countries has been the subject of three international conferences, the most recent in Mashhad, Iran, in December 2012. Many COMCEC countries are actively developing products and services catering for the different segments of the market. Iran attracts 30,000 medical tourists a year (both from advanced countries seeking high-level but low-cost treatments, and from less advanced countries where medical facilities are unsatisfactory[76]. Moreover, Tunisia has successfully developed thalassotherapy sea water treatment as a means of product diversification (case study 4.1.9).

Events & Festivals

The organisation of themed events and festivals are seen as a way of attracting visitors for a particular interest and, by so doing, sampling the destination and being encouraged to return for a longer visit. The range of festivals being organised across the COMCEC region is hugely varied reflecting the unique features and characteristics of the country e.g. the 1st Malaysia International Shoe Festival, jointly organised by the Ministry of Tourism and the Malaysian Footwear Manufacturers' Association with the aim of promoting shopping, enhancing the show industry, nurturing young talents and generating new sources of tourism growth. It attracted 50,000 visitors and generated Malaysian ringgit 7.1 million (US $ 2.2 million) in retail sales turnover[77].

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75 http://www.omanconvention.com/
76 http://www.imtj.com/news/?entryid82=423518
77 http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/malaysia_country_report_2012.pdf

Cruise & Inland Waterways

The 7% a year growth in the ocean cruise market has alerted the authorities of COMCEC countries with coastal ports to develop port facilities to receive cruise liners.

Turkey has established a "Turkey Cruise Ship Platform" consisting of 13 port cities including Istanbul, İzmir, Mersin, İskenderun, Trabzon, Çeşme, Çanakkale, Marmaris, and Kuşadasi. It attracted 2.2 million cruise ship visitors in 2011.

The Arabian Gulf and Indian Ocean are important emerging cruise destinations as well as potential source markets. Dubai, Abu Dhabi, Oman and Bahrain are all actively promoting the cruise tourism to help boost their tourism industries. In the Red Sea Aqaba plans to develop a cruise line terminal and in Egypt, Alexandria, Suez and Sharm el Sheik capture traffic travelling through the canal from the Mediterranean theatre. In the Far East, Port Klang is the cruise port for Kuala Lumpur, and Malacca, Penang and Langkawi are popular as well as East Malaysia (Sabah and Sarawak). Indonesia's cruise ship programme is focussed on Bali and Lombok. Brunei is also featured on cruise ship itineraries. West African cruises are less well-developed but offer considerable opportunity.

Dubai's Cruise Terminal was named the world's leading cruise port for the seventh year running at the World Travel Awards 2013, has seen five-fold growth since launching its new facility in early 2010. Abu Dhabi also launched a 1,300-visitor capacity tented cruise terminal at Mina Zayed in late 2011, ahead of the construction of a permanent dedicated facility to accommodate 600,000 passengers by 2030. Abu Dhabi Tourism Authority has also prioritised cruise tourism as a strategic focus. It should be noted however that cruise tourism (like many aspects of mass tourism) can have significant negative environmental and social aspects which are often not well understood, and which require careful management, as indicated in the case study 2.4.3. relating to the Alaska Cruise Shipping Initiative.

A prefeasibility study has been conducted by UNWTO to investigate the potential of establishing a cruise programme on the Caspian featuring ports in Azerbaijan, Iran, Kazakhstan and Turkmenistan which are also among COMCEC members.

Beach & Marine

As noted in section 2.3.1, the widespread beach resort tourism development model of the past fifty years has led to an increasingly homogenised holiday product, driven by price. The results of the 2012 global TRAVELSAT Competitive Index Survey based on 30 000+ interviews of representative international travellers from 50+ source markets (including Turkey, Indonesia, Malaysia, Bahrain, Oman, Qatar, Egypt Morocco, Tunisia and the United Arab Emirates among COMCEC members) indicate that having beautiful beaches and resorts is not enough to guarantee continued good rates of growth.

Destinations need to focus on quality of services to compete effectively. Global competition between 'sea & sun' destinations is centred on consistency in quality perceived during the whole stay and the extent to which can generate positive or negative word-of-mouth. The survey illustrates the importance of addressing more intangible criteria such as environment, feeling of security, and local food as part of successful tourism development. The global survey shows that the Middle East is rated higher than other destinations for shopping experiences, but lower than the Caribbean, for example, in terms of perceived ease of communication and friendliness of locals. North Africa is seen as weaker than the Caribbean on leisure activities, nightlife and local food[78].

Domestic Tourists

Developing products that cater for domestic tourists is regarded as an important means of improving a country's tourism balance of accounts, and increasing the population's awareness of their own natural and cultural heritage. The prime motivation behind the regional tourism development plans prepared in the Supreme Commission for Tourism and Antiquities of the Kingdom of Saudi Arabia, and the various tourism events organised across the country, was the to encourage and support domestic tourism. The COMCEC region's established tourism destinations all have components of their strategy directed towards domestic tourism e.g. Turkey's strategy is "to provide an alternative tourism products based on acceptable quality and affordable prices to various groups in the society", recognising that different products at different price levels, are needed to enable all the population to engage in domestic tourism (Tourism Strategy of Turkey – 2023).

For COMCEC's least developed countries, developing tourist products for the domestic markets represents the means to kick start the development of tourism product provision. It can serve to create recreational and leisure pursuits for the local population, provide economic opportunities for local communities, and contribute to the general raising of awareness of tourism among the population.

International Tourists

The economic slowdown in the traditionally strong tourist generating markets of Europe and North America has obliged destinations to focus on other source markets with more rapidly growing economies e.g. the so-called BRIC countries (i.e. Brazil, Russia, India, China). They have achieved considerable success in this strategy, as evidenced by Russia becoming Turkey's second largest market after Germany accounting for 3.5 million arrivals in 2011; and China becoming the Maldives' principal source, increasing its share of total arrivals from 2% to 21% between 2001 and 2011.

Within the international market, destinations identify a large number of segments or niches defined according to shared interests. A clear opportunity exists for COMCEC member countries to target visitors from other COMCEC countries. The shared religious belief and socio-cultural practices leads to opportunities for the development of tourism products designed to cater for tourists from COMCEC countries. The Sharia-compliant hotel concept through its unique value proposition has become attractive in many COMCEC countries,

[78] Source: http://www.abouttravel.com/

including Turkey (Alanya) and Maldives, where a sharia-compliant resort is under construction.

The increasing availability of Sharia-compliant funds and the rise in intra-regional travel have been identified as the major drivers behind the success of this concept. The concept is not new, as most hotels in Saudi Arabia have long been Sharia-compliant. Malaysia grades Sharia-compliant properties and markets them to visitors from other COMCEC member countries and domestic Malays. Some hotel brands originally described as Sharia-compliant upon their launch have altered their claims and now consider themselves to be purely alcohol-free or 'dry' hotels. There is growing demand for both concepts.

3.3. COMCEC Member Countries' Marketing Strategies

3.3.1. Overall Scenario for Destination Marketing

In considering the approaches they should pursue over the next decade to marketing their destinations, all countries face the need to adapt to changing patterns of market demand. As noted in section 2.3.2, the trend in 21st century tourism marketing is increasingly becoming more sophisticated as products are designed targeted at increasingly narrowly defined market segments and niches. That is not to argue that mass tourism products will decline, only that the growth in demand for these from traditional source markets will be less than for the more focussed tourism products and services.

To develop more effective and targeted e-marketing, destinations and tourism companies are increasingly seeking customized and relevant information by gathering large amounts of data from multiple sources. Consumer technology is changing traveller behaviour and expectations. Tourist organizations and companies try to keep up with the latest advancements focusing on cost optimization and performance enhancement while they also need to increase their focus on how technology can better meet their travellers' needs.

3.3.2. Targeting Markets

The high cost of destination marketing campaigns is obliging National Tourism Organizations (NTOs) to be more selective in the geographic markets and segments within those markets that they direct marketing activities towards. While those COMCEC countries with large tourism sectors continue to undertake marketing, promotion and public relations in all major markets, shifting the balance of investment towards the most immediately productive sources such as China, the smaller tourism country members of COMCEC target a limited range of generating markets. The current areas of focus of destination marketing by the three COMCEC country regional groups are as follows:

- African COMCEC Group – Europe and Africa only for the least developed nations,
- Arab COMCEC Group – well-established tourism destinations like the United Arab Emirates and Egypt target all major source markets; while other countries, though active in Europe, focus on Middle East/Gulf States, India and Australasian markets,
- Asian COMCEC Group – again, the well-developed tourism destinations have a broad geographic range of target markets: intra-regional Asian markets are of particular

importance at present; while COMCEC Asian countries have increased marketing activities targeted at the Middle East/Gulf States.

3.3.3. MARKETING TRENDS

The focus of tourism marketing is moving from relying on general advertising and other 'above the line' campaigns (see sub-section 2.2.2.3), such as the famous *Malaysia Truly Asia* TV campaigns, towards boosting this with 'below the line' activity, such as public relations (PR) and social media campaigns. In 2011, for example, Tourism Malaysia spent over US$ 500,000 on Facebook campaigns[79].

Turkey is an example of a country with a broadly-based marketing and promotional mix. In 2013, its global tourism marketing budget is reported to be US$ 128 million. Turkey has 40 promotion offices across the world. Above-the-line marketing activity includes TV commercials, advertisements on billboards and Internet banners. Below-the-line activities include hosting over 200 foreign opinion makers, primarily journalists, to experience the country's tourism products and services. Working in partnership with the travel trade, Turkey is promoted in 153 different fairs in 61 countries. E-marketing and a well-designed website have been developed. Turkey increased its total number of tourists from 13.2 million in 2002 to 31.8 million in 2012, a total increase of 141%. The country recorded a 10.9% rise in arrivals in the first half of 2013 [80].

To develop more effective and targeted e-marketing, destinations and tourism companies are increasingly seeking customized and relevant information by gathering large amounts of data from multiple sources. Consumer technology is changing traveller behaviour and expectations. Tourist organizations and companies try to keep up with the latest advancements focusing on cost optimization and performance enhancement while they also need to increase their focus on how technology can better meet their travellers' needs. Consumers are increasingly seeking instant, personalized and bookable services. This is all evidenced in the rapid growth of social marketing as one of most important elements of national tourism campaigns. It is however expensive to do effectively, and not all COMCEC countries have social marketing as part of their promotional mix. Some have yet to develop dedicated tourism marketing websites.

Three examples of the effective use of e-marketing from the COMCEC region are Indonesia, Jordan and Sierra Leone.

Indonesia is amongst those increasingly investing in social marketing, promoting its tourism industry through digital channels, especially through a dedicated website and social media platforms. Besides information on tourism sites, videos, and events, Indonesia also has specialized microsites for 19 different regions in the world's most populous Islamic country.

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[79] http://www.themalaysianinsider.com/malaysia/article/tourism-ministry-rm1.8-million-spent-on-facebook-pages/

[80] http://www.balkaneu.com/significant-increase-tourism-turkey/
http://www.balkaneu.com/significant-increase-tourism-turkey/#sthash.IE38dtE6.dpuf"

Each local government offers their own attractions which makes it easier for travellers to dig up relevant travel information with ease.

Jordan also invests heavily in social media campaigns, in keeping with its strategy to promote the Hashemite Kingdom as a special interest, boutique destination. The Jordan Tourism Board engages specialist digital marketing companies to design campaigns and maintain consumer databases. In December 2011, the Jordan Tourism Board ran an innovative marketing collaboration with travel bloggers (i.e. people who maintain a personal diary of their travel experiences online). The concept, using www.iambassador.com, involved the tourism board and eight travel bloggers who visited Jordan, leveraging the bloggers' published Jordan content and their social networks. The bloggers showcased Jordan as a featured destination on their blogs for a month. The campaign also included a social media event spanning two days during which the bloggers created a media marketing blitz using their social media channels (Twitter, Facebook, and Google+, with Twitter being the primary platform) to promote Jordan using the hashtag #GoJordan.

The campaign drove traffic to the Visit Jordan website and to the participating blogs, as well as to the newly-launched Postcards from Jordan microsite[81] featuring posts from travel bloggers. The Jordan Tourist Board's website attributed its top travel listings 2012 on Virtuoso & Condé Nast to its 2011 blogger & social media campaigns, together with an increased number of followers on its Facebook and Twitter pages. Several hundred people participated by tweeting about their experiences in Jordan, often including links to articles and photos. As a result, the general public learned about Jordan's diverse attractions and many expressed an interest to visit Jordan in 2012, while others reminisced about their holiday in Jordan. Many local Jordanians joined by sharing travel tips.

In *Sierra Leone* innovative social marketing is undertaken by Tribewanted, a sustainable tourism and social enterprise which began in Fiji in 2006. In 2010, Tribewanted began operating its second project at John Obey beach, Sierra Leone. Tribewanted describes its mission as 'to build sustainable communities in amazing places that benefit locals and visiting members; inspiring positive change within and far beyond the village'. Both projects have received extensive media coverage, including a five-part BBC documentary called Paradise or Bust and a book by founder Ben Keene. Tribewanted's business model involves building up a social network of supporters who share an ecological vision and are willing to participate in creating the future locally-owned resort. Management of the Fijian project was handed to the local community in October 2011[82].

[81] http://www.visitjordan.com/postcards
[82] http://www.tribewanted.com/

3.4. Challenges and Obstacles Facing COMCEC Member Countries

3.4.1. Overall Difficulties Facing COMCEC Countries

The world faces a continued period of steady, rather than rapid, growth in international tourism, with traditional markets in the west expanding more slowly than the Asian and other markets like the Middle East. At the same time tourism destination competition is ever increasing. Countries are having to adjust to these changes and intensifying rivalry. They are seeking to do this through diversification of their tourism product and experiences; and by increasingly targeting these tourism products at selected market segments and niches. Highly targeted marketing communications are employed with increasing use of electronic technology.

The overall challenges faced by the countries in the COMCEC region, as summarised in the COMCEC Tourism Outlook 2013 report, are significant and determine the individual countries' ability to grow their tourism sectors. These include:

- Technical know-how and weak promotional activity
- Insufficient tourism-related infrastructures
- Insufficient tourism investments
- Lack of consistent tourism strategies and plans
- Lack of tourism diversification
- Lack of tourism safety

It is a simple fact that COMCEC countries compete in a global marketplace in which the weaker destinations fare less well than the better organised and resourced destinations in respect of resource availability in the three areas of:

1. Technical – full access to the latest electronic technology that drives the tourism distribution system,
2. Human - knowledge of tourism markets and the distribution system,
3. Financial – for the funding of infrastructure required for tourism, as well as tourism facilities, attractions and activities.

These shortcomings impair the ability of the less economically-advanced COMCEC Member Countries to have strong tourism institutions, fully-researched strategies, comprehensive and integrated development plans. The absence of extensive investment programmes (including appropriate support mechanisms) and highly effective, targeted marketing also impact on destinations realising their full potential.

A number of COMCEC Member Countries can, and do, compete successfully in this environment; many others have to be more considered and selective in their tourism development ambitions, while putting in place programmes to increase their technical, human and financial resources, both through cooperation with those fellow Islamic states that have well-established tourism sectors, and outside assistance agencies.

The question of the perception of lack of personal safety that prevails among large sections of industrialised country populations is one that can only be effectively addressed through a sustained period of stability and peace in the COMCEC Member Countries. Evidence indicates that within a short period, civil and other turmoil in countries that have a history of being tourism destinations, can be overcome and tourist activity return to normal. This happened in Egypt following the Luxor killings of 1997; and is beginning to occur in Tunisia following the disruption during its political changes in 2011.

3.4.2. Difficulties Impacting on Tourism Product Development and Marketing

Several of the specific issues that serve to constrain tourism product development and destination marketing in COMCEC countries arise from the overall obstacles, while others are directly related to the tourism markets and distribution systems. These are discussed under the following sub-headings: government support, border formalities, human resources, transport access and infrastructure, market control, local society awareness, land, finance, economic leakage, and image and perception.

3.4.2.1. Government Support

Given the high sensitivity of demand to economic and other conditions, tourism still suffers in many parts of the world as having the image among public administrations of being a less reliable source of economic development than agriculture or industry. Consequently, it tends to be given a relatively low priority in terms of support and planning. Tourism administrations in such countries consider that they are hampered in terms of their ability to facilitate the development of tourism product and services required by the market and, thus, compete effectively in the international marketplace. The questionnaire responses to the COMCEC study survey show that this difficulty is felt in the least developed countries in the Africa sub-region in particular. Lack of government support for the development of new tourism products is a serious obstacle in many COMCEC countries.

3.4.2.2. Border Formalities

There remain many instances in COMCEC countries, including in respect of travel between COMCEC countries, where immigration controls impose a lengthy and complicated set of procedures. A key requirement in the realisation of a policy to increase any form of trade is the facilitation of the movement of goods between nations. For tourist movements to be encouraged to their full potential border formalities need to be simplified to the maximum extent consistent with national security. COMCEC's stated strategy of 'enhancing mobility' directly addresses this issue.

3.4.2.3. Human Resources

The establishment of a cadre of tourism professionals, fully versed in the tourism distribution system, and the development of tourism markets and competing destinations is a prerequisite for any destination intending to realise its full potential in the tourism marketplace. In the well-established tourism destinations in COMCEC, this excellence exists; but in the majority of COMCEC Member Countries, especially the least developed nations, there are serious shortcomings in this respect, leading to a dependence on international technical assistance which may not always be fully sympathetic to the socio-cultural needs of the destination. This is an area that can be addressed through schemes designed to transfer technical skills between COMCEC Member Countries i.e. from the leading COMCEC tourism countries to the others.

3.4.2.4. Transport Access and Infrastructure

The ability of prospective tourists to travel to, and around, a country is a critically important element in destination choice decision-making. For a destination to be competitive it needs adequate transport infrastructure and air/road/rail/sea services (as appropriate). Again, the least developed country members of COMCEC suffer from weaknesses in infrastructure that serve to hamper both the existing operation of their nascent tourism sectors and their abilities to develop new tourism products around the country and to widen the spread of benefits over its population.

3.4.2.5. Market Control

The tourism distribution system is characterised by being predominantly under the heavy influence of organisations outside the destination. Foreign airlines and tour operators exercise a great degree of control over tourist flows. While this has lessened over the past decade with the ready availability of information and direct booking facilities on the internet with all forms of tourist product in destinations, it still remains a significant factor in destinations' marketing strategies. It can create a situation where demands are placed on the destination tourism marketing entity to undertake particular promotional or other activities in the market of the airline or tour operator that may not always be the best use of limited marketing budgets. This remains a challenge for destinations, and heightens the need for a high level of knowledge and insight among the personnel of tourism administrations in order that the correct marketing investment decisions are made.

3.4.2.6. Local Society Awareness

The frequently wide disparity between the living standards and socio-cultural norms of the host population and foreign tourists gives rise to apprehension and, in some instances, reluctance about welcoming tourism development, and engaging with foreigners. This is especially marked in those countries without a long tradition of tourism, and concerns can be increased as a consequence of the different religious belief systems and practices of the Islamic populations of COMCEC countries and foreign visitors. Lack of awareness/understanding of tourism in their societies is the second most common cited challenge in the NTO survey conducted for this study.

3.4.2.7. Land

Obtaining access to land under acceptable terms and conditions is a constraint to new tourist product development frequently cited by prospective investors. This observation, common across many African countries, is characterised, with regard to regulations, customary land practices, and by conflicts in land appropriation procedures. Systems and procedures for the acquisition of land, and leasing arrangements, are aspects to be given greater attention in investment codes, in order to provide greater clarity.

3.4.2.8. Finance

The single most commonly cited barrier to increased tourism product development (and marketing activities) is shortage of finance: from government for infrastructure and marketing; and from the tourism private sector for new tourism products. Even a highly successful COMCEC tourism destination like Turkey, with a specific incentive scheme in place, finds it difficult to attract investment for fully researched and well-planned tourism development opportunities away from the coastal areas. Tourism product development and marketing strategies can at best only be partly effective if they are not underpinned by identified channels of funding and investment.

3.4.2.9. Economic Leakage

In many developing countries and in practically all least developed countries, a high percentage of the foreign exchange income generated from international tourists is lost to the country through imported items. This leakage can range from imports of goods and services to meet the requirements and expectations of tourists to the necessity to employ foreign personnel (like chefs, managers) to the repatriation of benefits of foreign tourism companies.

3.4.2.10. Image and Perception

The legacy of the Israeli-Palestine conflict, the 9/11 and subsequent attacks against western targets, the western military intervention in Iraq and Afghanistan, and the ongoing instability in a number of countries in the Middle East and Africa, is a heightened concern about personal safety when visiting countries in these two COMCEC sub-regions. While these perceptions are not valid, they determine destination choice and so have to be addressed through public relations activities to build up trust in the marketplace. One way in which this can be achieved is through positive feedback from a sponsored visit by a personage respected in the market (e.g. a politician, arts or sports personality).

3.5. Future Tourism Prospects and Implications for Product Development and Marketing Strategies

The COMCEC Member Countries face significant challenges but also have outstanding prospects for developing their tourism sectors, an observation that applies equally to those countries with already well-established tourism sectors and those at the early stage of development. Recommendations on the ways in which COMCEC and its member countries can tackle the difficulties and more fully exploit the potential of tourism development are given in section 5.

3.5.1. *Addressing the Challenges*

Destinations in other regions will not wait for the COMCEC countries to develop their institutions, develop well-researched strategies, establish and support tourism product development and investment plans, and execute powerful tourism marketing messages. The onus is on the countries themselves and through cooperation with each other, facilitated to the maximum extent possible through COMCEC. In addition, full use can be made of the available international assistance to create the situation where tourism can prosper benefiting the economy and local populations, while providing rewarding experiences for tourists.

Increasing government recognition of the importance of tourism as a valuable contributor to the economy, increasing and upgrading infrastructure, developing a cadre of tourism excellence in government tourism agencies, building awareness and understanding among local populations about the benefits of tourism, and creating conditions conducive for investment in the sector are all challenges that can be addressed through increased collaboration and cooperation between COMCEC Member Countries with those with strong tourism sectors building capacity and transferring skills to other COMCEC countries, particularly to the least developed countries.

3.5.2. *Realising the Opportunities*

Two major trends in tourism market demand and the ways in which the tourism distribution system responds to these changes augur well for COMCEC Member Countries.

First, the trends and changing tastes in tourist market demand for direct access to the natural features and cultural heritage of the countries they visit represent strong opportunities for COMCEC countries which have a wealth of such resources. The development of tourism products related to the nature and culture of the least developed COMCEC countries in particular provides the potential for local communities to become involved, or increase their participation, in the tourism economy.

Second, the increased sophistication of market research techniques makes it easier to separate out prospective tourists' interests into products and services tailored to the requirements of increased numbers of market segments and niches related to the identified interests. For

COMCEC countries with established tourism sectors, this enables them to diversify the range of tourism products offered, thereby increasing their appeal to, and ability to attract, a wider cross-section of the tourist market.

For least developed COMCEC countries, this fragmentation of demand enables them to develop tourism products and services for targeted segments and niches interested in visiting relatively undeveloped tourism destinations.

For the well-established tourism destinations within COMCEC, competing in the global marketplace, their approach to tourism product development and marketing strategy is determined by the need to match or exceed the offering and marketing communication reach of their competitors. They have the advantages that there are 1.6 billion fellow Islamic citizens in the world, who share many cultural norms and sensitivities, and the outstanding Islamic cultural heritage. Destinations can draw on other COMCEC countries in shaping tourism products related to these strengths, an attribute that can become a unique selling proposition, but which has to be treated with the utmost respect and care.

The need to reduce economic leakage can be addressed through matching the tourism sector's needs with local provision. For countries where the economy is capable of producing many of the inputs required by the hotel industry, such as agricultural produce, textiles and furnitures, the need is to synchronise production with demand from the tourism sector so that imports can be substituted by local manufacture.

The less diversified the economic structure of a country, the higher the level of imports and of leakages. In such cases, tourism development based around the goods and services that can be supplied locally (typically nature and community-based) can result in lower leakage – albeit lower gross earnings.

4. GOOD/BEST PRACTICES IN THE COMCEC REGION

4.1. Destination Successes – Case Studies from COMCEC Countries

There are significant successes in tourism product development throughout the members of the COMCEC, from the countries with large and flourishing tourism sectors to those in the embryonic phase of developing tourism as a tool for economic advancement.

There are 12 examples from different COMCEC countries presented in this section of the report. They are:

1. Turkey – case studies related to the planning of large scale development (Belek),
2. Malaysia – case study on rural community-based tourism development (homestay)
3. Maldives – case study on regional development, and increased community involvement in tourism (Gan-Addu Atoll)
4. Gambia – case study on small scale entrepreneurial support (ASSET)
5. Jordan – case study on ecotourism development, pro-poor support and private sector participation (Feynan Eco-lodge)
6. Lebanon – case study on product development to benefit local population and assist in environmental protection involving the coordination of multiple players (Shouf Biosphere Reserve)
7. Qatar – case study on product and market segment development (Aspire Zone)
8. Benin –case study on value chain analysis and backward linkages
9. Tunisia – case study on market; product diversification based on innovation
10. Egypt – case study on coordinated and environmentally sensitive planning of large scale tourism development (El Gouna)
11. Silk Road – collaboration and coordination between 17 COMCEC member countries and 14 non-COMCEC countries
12. United Arab Emirates, Ras Al-Khaimah/Real Madrid – collaboration between major international sports brand and COMCEC member on 'sportainment' (the merging of sport and entertainment) development

These case studies show that those COMCEC Member Countries with the most developed tourism sectors have engaged in comprehensive and structured tourism development strategies. They have clear destination marketing strategies and programmes of marketing and promotional activities to raise and maintain awareness and to build a positive image in the global marketplace. Those COMCEC countries in the development and early phases of the tourism area life cycle are using international assistance and the examples of other countries within the COMCEC group to plan for sustainable tourism that achieves maximum benefit for the country's economy and the population.

4.1.1. TURKEY, BELEK

One of the most successful COMCEC countries in tourism is Turkey. The extensive development on the Mediterranean coast of Turkey in the Antalya-Belek region was created from scratch from the early 1980s. In the near 30 years since the first developments, the area now attracts 14 million tourists a year. The Turkish authorities apply a system of detailed planning for their developments: initially the overall regional master plan, followed by physical plans, and then implementation and land allocation plans. The Law for the Encouragement of tourism establishes priority zones for tourism development. There are 168 declared designated tourism zones.

Turkey has published a long term strategy in place covering the next decade (Tourism Strategy for Turkey (TST2023)).[83] The approach is "to develop tourism on a regional basis within a guiding rather than imperative and dynamic rather than static framework". The TST2023 recognises the need to avoid some of the difficulties associated with large scale developments that have arisen in the past (e.g. mass concentration at the Mediterranean and Aegean coastal areas, distorted urban development/house building in back-shore and adjacent areas, infrastructural shortcomings, environmental problems, water shortages), and plans to avoid their recurrence through the TST2023's extensive and integrated approach to future tourism development.

In recognition of the extensive range of resources and assets within the country suitable for tourism development, and the need to enable the full cross-section of the Turkish population to benefit from tourism, the TST2023 identifies health and thermal tourism, winter sports, mountain climbing, adventure trips, ecotourism, the MICE – meetings, incentives, conferences, exhibitions – sector, cruise ship and yacht tourism, golf and other sports tourism as product development diversifications away from the established coastal and urban tourism.

The two priority tourism product development types on which Turkey is focussed are: thermal spa developments, and winter sports. The country has 1,300 geothermal resources, the plan being to link thermal resort development (i.e. comprising a hotel and cure center and park for relaxation, recreation and entertainment) with other tourist activities like golf, winter sports and water activities. Prospective winter sports areas are in parts of Turkey that have been little developed for tourism to date. The focus on these two areas is intended to diversify the country's tourism activities and market segments, to spread the socio-economic benefits of tourism around the country, and to even out the seasonal flow of tourists to the country. Turkey has also recently developed facilities to receive cruise ships.

TST 2023 details separate strategies and objectives over the period to 2023 for:

- Planning
- Investment
- Organization
- Domestic travel

[83] Tourism Strategy of Turkey 2023. http://www.kulturturizm.gov.tr/genel/text/eng/TST2023.pdf

- Research and development
- Transportation and infrastructure
- Marketing and promotion
- Education
- Service quality
- City branding
- Tourism diversification
- Regions to host rehabilitation efforts for tourism areas
- Tourism development zones
- Tourism development corridors
- Tourism cities
- Ecotourism zones

A detailed implementation plan covering corporate structuring and governance, action planning and monitoring and evaluation is incorporated within the TST2023. The TST2023 represents a model for any destination to study and follow with appropriate adjustment for its own circumstances.

Of particular relevance are the strategies in respect of organization, research and development, and marketing and promotion i.e.

TST 2023 *Organization* strategy:

> *To achieve institutionalization 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.*

TST 2023 *Research and Development* strategy:

> *To achieve top prioritisation of R & D efforts in tourism industry among public and private sector and tourism organisations* NB the TST2023 states that "in tourism the term *research* is perceived within the context of competition, cooperation and search for new products".

TST2023 *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.*

The intention is to develop individual sub-brands based on the feature of the different regions of Turkey that are original, authentic and different, along the lines of the house of brands concept of organisations like Ford with individual car models designed and targeted at specific consumer segments. Turkey has 40 overseas tourism promotional offices. Of course, the marketing and promotional budget for a major destination like Turkey are very significant and out of reach of the smaller destinations within the COMCEC membership, but much of the approach adopted to its marketing efforts and the coordination with private sector interest has relevance to all destinations. The head of the Information and Promotion department of the Ministry of Tourism and Culture is also the Chairman of the multi-party Tourism Working Group, an important way of ensuring full consultation, collaboration and coordination.

It is significant to point out that TST2023 has a section dedicated to domestic tourism, the strategy being to provide a range of tourism products of "acceptable quality and affordable prices" for the various sections that make up Turkish society. This focus on domestic tourism is important for all COMCEC Member Countries, particularly those whose access and appeal to international markets is limited. Through the creation of appropriate products and experiences – often of a small scale and involving backward linkages to agriculture and other suppliers – the genesis and early development of tourism can be based on catering for residents from other parts of the country. The basis for tourism can be established in this way. This can serve to attract those visitors from outside seeking direct access to authentic local culture and nature – the explorers, adventurers, or, using the terminology of Plog, the allocentric visitors[84].

Title & URL	**Belek, Antalya**   http://www.belek.ro/en/
Type of good practice illustrated	Large scale development
Project description	The Ministry for Culture and Tourism (MoCT) The Tourism Master Plan for 2023 prioritises broadening the industry, by focusing on areas such as health, cultural, winter, golf, conference and fair tourism. This strategy aims to see the economic benefits of tourism more geographically dispersed and less seasonal, eliminate inter-regional differences in development levels and increase competitiveness. 'Belek Tourism Centre', 30km from Antalya is a large scale high-end tourism resort on the Mediterranean coast which is rapidly becoming one of Europe's top golf destinations. The resort comprises 14 golf courses (including the National Golf Club), over 30 four and five star hotels (with a capacity of about 45,000 beds) and many other accommodation, services and entertainment facilities. 300 days of sunshine per year means that Turkey's premier golfing destination is appropriate all year round and even in winter, there is an average of more than 6 hours sunshine per day. In

[84] Why Destination Areas Rise and Fall in Popularity. Plog, s. 1974 (in Cornell Hotel and Restaurant Administration Quarterly, Vol. 14, No. 4., Updated 2001, Vol. 42, No.3)

	2012, Belek hosted the international Turkish Airlines World Golf Final. The range of 9, 18 and 27 hole golf courses are designed by internationally acclaimed course designers. Besides golf, Belek is also an important centre for football related tourism. The resort has 44 football pitches, provides camping possibilities to hundreds of professional and amateur football teams every year. Belek also offers cultural attractions. The history of the town dates back to the 4th Century BC and the sculptural and architectural elements of the area illustrate the Hellenistic, Roman, Byzantine and Seljuk influences. The popular heritage sites of Perge, an old town which was built in 1500 and one of the best preserved ancient theaters, Aspendos, which has a capacity of 15,000 people and theatre is the best preserved and is used today are also located nearby. There are also 29 Spa facilities located in Belek, offering top quality treatments. The local population varies between 750 and 10,000 in low and high season, respectively.
Rationale and justification for project	Belek was chosen as the destination for the resort thanks to its suitable climatic conditions, topographical characteristics, good infrastructure and location nearby to Antalya, a city with many tourism facilities and an international airport. Beginning in 1984, the initiative was a coordinated effort between The MoCT and the Belek Tourism Investors Association (BETUYAB), a management association founded in 1988. Every company investing in the Belek Tourism Centre is obligated to become a member of BETUYAB.
Details of project planning, development and operation	15 years ago, Belek was just a reedy and marshy area, today it is the key model of the Turkish tourism industry's public – private partnerships. Most of the infrastructural investments of Belek Tourism Center have been facilitated through the involvement of the Ministry of Culture and Tourism, (drinking water, sewage systems, wastewater treatment plants, electricity and telecommunication). Under the orientation of The Ministry of Culture and Tourism, "Belek Tourism Investors Association Inc.Co." (BETUYAB) acts on behalf of all members in terms of remedy of various problems, ensuring joint actions at the contacts with related institutions and establishments, national and international promotion of the region. The membership is compulsory by means of payment of the contribution shares and membership fees.
Key success features and practices	✓ Large scale ✓ Co-ordinated ✓ Regional ✓ Resort – based(golf&spa) ✓ Long term strategy ✓ Emphasis on high standards of quality ✓ Public-private partnership
Sources of information	http://www.belek-ideas.com/aboutbelek.htm http://www.goturkey.com/en/place/detail/belek http://www.kultur.gov.tr/Eklenti/4240,antalyabelek-ingpdf.pdf?0

4.1.2. *MALAYSIA, HOMESTAY*

Like Turkey, Malaysia is a destination with a wide spread of tourism destinations and products, ranging from coastal and highlands resorts, nature and cultural tourism involving rural communities, and MICE and other forms of city tourism in Kuala Lumpur.

In its country paper at the 2013 UNWTO Conference on Sustainable Tourism Development[85] Malaysia outlined its aspiration of becoming a high income country by 2020 through its Economic Transformation Programme. Tourism is one of the national key economic areas by which the country aims to achieve this economic transformation. In this regard, the **Malaysia Tourism Transformation Programme** (MTTP) was formulated to achieve the targets of attracting 36 million international tourists and generating Malaysian ringgit 168 billion (US $ 50 billion) in terms of tourist receipts i.e. a threefold expansion of foreign exchange earnings, thus contributing Malaysian ringgit 3 billion (US $ 1 billion) revenue per week in 2020. This strategic ambition will be achieved through, inter alia, the 12 Entry Point Projects proposed under the Tourism National Key Economic Area based on the themes of:

- affordable luxury,
- family fun,
- nature adventure,
- business tourism, and
- international events, spa and sports.

As part of the country's efforts to promote a dynamic and vibrant tourism industry, creative tourism products are being developed, including:

- shopping,
- homestay,
- parks and gardens,
- contemporary art tourism, and
- shoe festival.

Like Turkey, Malaysia places high emphasis on domestic tourism, this segment accounting for 131 million visits in 2011.

Malaysia provides a good example of collaboration between COMCEC Member Countries through a joint promotional programme with Indonesia. It sees joint promotion as a cost-effective way to market multi-destination tourism packages, acknowledging that tourists do not wish to be constrained in their choices by administrative boundaries. A **"multi country – multi destination"** joint promotion was carried out through the UNESCO 1-2-3 Package initiative. This package provides an experience of visiting three heritage sites located in two countries, namely Malaysia and Indonesia. With the price of one package, a tourist gets to experience different cultural-mixes from three UNESCO World Heritage sites, namely Borobudur in Indonesia, and Malacca and Penang in Malaysia. It also can help to upgrade the livelihood of the local economies through sustainable tourism for both nations.

[85] UNWTO 25th CAP-CSA and UNWTO Conference on Sustainable Tourism Development, April 2013

The Malaysian presentation outlined the growing efforts to enhance joint promotions. The ASEAN Product Development Working Group (PDWG), has identified 130 tourism products to be promoted in the areas of nature-based tourism, cultural and heritage tourism, community-based tourism, and cruise and river-based tourism. The collaboration must involve at least two (2) ASEAN Member States (AMS) with at least one (1) ASEAN tourism product. The packages developed are jointly marketed under the ASEAN brand – South East Asia: Feel the Warmth.

Title & URL	**Malaysia Homestay Programme**  http://www.go2homestay.com/
Type of good practice illustrated	Rural community-based tourism development
Project description	The Malaysia Homestay Programme is a rural development initiative designed to allow tourists to stay in a traditional Malaysian private home with a host family while interacting and experiencing the traditional way of life. Homestay locations have been established in rural villages throughout the country, each offering a taste of the unique local culture and the traditional 'Kampung' way of life. In each of the villages, a cluster of Homestay accommodation is available to visitors. The wider rural community also benefit from the Homestay programme, through activities such as trek guides, production and selling of local craft and art as souvenirs. The concept of the Homestay is focussed on immersing the visitor in the local lifestyle and culture and the programme has experienced increasing popularity. In the region of Sabah, one of Malaysia's top 3 most popular Homestay destinations, there are 16 Homestay locations with over 200 participants. In 2011, Sabah Homestays received 13,000 foreign and 7,000 domestic visitors, exceeding the targeted RM2.7million revenue by RM1.2million (mysarawak.org, 2012)

Rationale and justification for project

The Homestay Programme ensures the benefits of tourism can be experienced in local rural communities. It appeals to the tourist because it enables the visitor to have a meaningful cultural experience and to taste the traditional way of life. Because the programme relies on the authenticity of culture and tradition, it is a means of ensuring and incentivising the conservation and maintenance of the traditional society and way of life.

Details of project planning, development and operation

The Homestay initiative was established in 1995 by the Malaysian Ministry of Art Culture and Tourism. In 1997, there were about 286 houses officially participating in the Homestay programme, by 2004 there were 948 (Hamzah, 2006). Initially Launched in the region of Pahang, it has expanded into various other states throughout the country. In 2001, the Rural Tourism Master Plan for Malaysia (Tourism Development International, 2001) cited a need for investment, improved facilities and a higher standard in rural accommodation.

In recent years, the Homestay Programme has undergone major improvements and much organisation has been undertaken, particularly in licensing and training. The Ministry of Culture, Arts & Tourism certifies participating Homestays, often assisted by local non-governmental organisations (NGOs). Each district has a coordinator who works with the authorities and the hosts. The programme has experienced a 77% increase in visitor arrivals in 2009 to 161,561 tourists (of which 31,523 are foreign visitors). In 2010, 3,283 Homestay operators in 141 villages had been trained and licensed and the programme won the United Nations World Tourism Organisation (UNWTO) Ulysses Award for Innovation in Public Policy and Governance in 2012 (Tourism Malaysia).

In 2010, the MoT launched all-inclusive packages for tourists, in which the visitor can travel around Malaysia by rail, staying in different Homestays throughout the country. The programme has also undertaken a new e-marketing promotional effort (http://www.go2homestay.com/app/); marketing is undertaken through social networking websites such as Twitter, Youtube and Facebook and an app for smart phones has been developed.

Key success features and practices

Promotion of sustainable tourism in rural communities

- ✓ Reduction in rural-urban migration
- ✓ Promotes intra-cultural interaction
- ✓ Fosters gender equality
- ✓ Presents an authentic socio-cultural experience to the visitor
- ✓ Extensive infrastructural investment unnecessary
- ✓ Uses activities already available in the communities
- ✓ Focussed on specific market segments (e.g. Student groups)
- ✓ Linked to private sector tour operators
- ✓ Empowers the poor to share the benefits of tourism activities (as Homestays require relatively investment)

Sources of information

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4.1.3. MALDIVES, GAN/ADDU ATOLL

Maldives has recently researched and prepared the drafts for its 4th Tourism Master Plan. Historically, it has pursued a development policy of resort development on islands without local populations on a "one island, one resort" basis. Tourism growth has been sustained since first opening up for tourism in the early 1970s with an arrivals figure of just under 1 million achieved in 2012 when the volume of resorts and hotels reached 124 offering a total bed capacity of 24,432. In addition, just less than 2,000 beds are available in guesthouses and liveaboard vessels, in the broad proportions of 1:3. A further 71 properties with a planned capacity of 10,432 beds are in the pipeline.

Europeans have been the principal source of tourists for Maldives for the purposes of relaxation or honeymoon in high end facilities in a tropical island setting, and the scuba diving segment. The upgrading of resorts to the top end has coincided with the economic downturn in western markets, leading to a fall in occupancy levels of five percentage points between 2007 and 2011, and a switch of attention to the Chinese market which now accounts for over 20% of arrivals (i.e. 199,000 in 2011 as against just 2,000 a decade earlier – almost all on honeymoon).

The requirements of the Chinese tourist for an extensive range of activities – quite different from the European visitor's desire for relaxation – has posed problems for those resorts on islands distant from either the capital, Male, or other resorts. The mixture of high and low activity guests on a small island can also cause difficulties.

The change of presidency in 2008, a more open tourism development policy was introduced enabling local communities to apply for guest house development. The resort operators' response to this development, coinciding as it did at a time when their occupancies were under stress, campaigned against it. In early 2012, the president stepped down in response to popular unrest and new elections are set for September 2013.

The Strategic Action Plan for Tourism in the draft of the 4th Tourism Master Plan has six main themes:

1. Maintaining Maldives position in world markets
2. Managing environment and conservation issues
3. Engaging more Maldivians in tourism careers
4. Promoting sensible ways for communities to participate in tourism
5. Promoting investment towards sustainable growth and high product quality
6. Efficiency in marketing and destination management

The increasing volume of visitation to highly environmentally sensitive, low lying islands creates its own problems. The strategy to manage environment and conservation issues has seven strands:

1. improve waste management practices of local communities,
2. develop and enforce management plans for sensitive environments,
3. establish marine managed areas in resort house reefs,
4. implement a "responsible visitor" programme,
5. implement a climate change adaptation programme for the tourism industry,
6. implement a low carbon programme for the tourism industry, and
7. strengthen environmental management for evidence-based decision making.

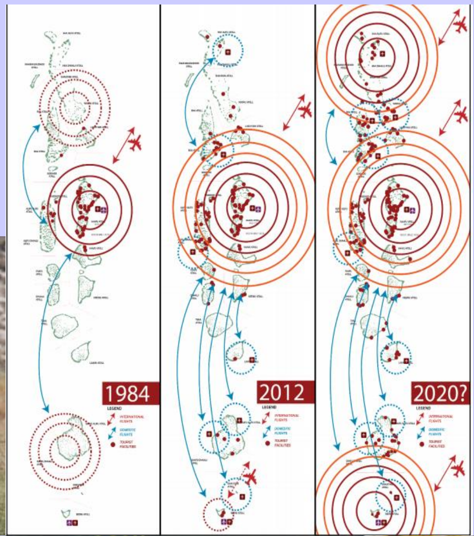
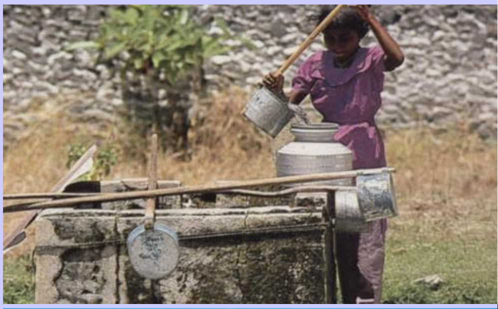
The impact of tourism development on the environment has been heavily debated but there is a lack of data to determine for sure the extent of this impact. At present, since 1993, there are requirements as part of environmental impact assessments (EIAs) for detailed analysis of environmental conditions before constructing a tourist facility. There are also requirements for environmental monitoring for a specified period of time following construction, but the draft of the 4th Tourism Master Plan notes that this is rarely followed up. Apart from the regulatory requirements, there is also a need to continuously gather data on critical environmental aspects such as coral reef health and coastal erosion. Regular environmental monitoring data are required to make evidence-based planning decisions on proper environmental management and conservation measures.

In order to spread the benefits of tourism more widely across the Maldivian population, the draft of the 4th Tourism Master Plan outlines the need for:

- education programmes to engage more Maldivians in tourism careers – the 2006 census recorded that only 15% of employed men and 4% of employed women worked in tourism,
- the promotion of entrepreneurship,
- a programme to determine the wider island roles in tourism that complement, rather than attempt to present an alternative to, the mainstream industry, and
- mobilising support, with international assistance, for community level tourism.

These proposals recognise that there is a strong appetite for wider participation in tourism from many sections of society, but that such aspirations need to be channelled into ways that are commercially viable and that will complement mainstream tourism. The present emphasis on the accommodation sector – in particular for guest houses - ignores the fact that there is no pattern of foreign FIT (free independent traveller) visitation to Maldives, apart from around the tourism transport hubs. The draft 4th Tourism Master Plan points out that there is, therefore, no clear market demand for large numbers of guesthouses on inhabited islands away from the hubs, and that it may be better to focus support for community participation in tourism towards the activities and attractions sector for which there is a known interest from existing, mainstream markets. Effective guidance for the development of the guest house sector needs full and accurate data consolidation of information on aspects such as the status of new lease agreements and occupancy rates. The aim must be to develop regulations and standards so that guest house developments meet market needs and can contribute to a thriving sector that integrates local entrepreneurs.

A major recommendation of the draft 4th Tourism Master Plan is the creation of a second international air access hub at the former British Royal Air Force airport at Gan in Addu Atoll. This is a component of the Plan's strategy of promoting investment towards sustainable growth and high product quality. Creating a new transport hub at Gan will assist existing resorts and make undeveloped islands more viable for resort development, as well as reducing the pressure on Male airport. The proximity of many resorts to the relatively large local population base of Addu Atoll – 30,000 – represents the potential for greater interaction between tourists and local people, providing business opportunities for Maldivian entrepreneurs and communities.

Title & URL	**Gan, Addu Atoll, Maldives** http://www.tourism.gov.mv/
	
Type of good practice illustrated	Regional development
Project description	In recent decades, the Maldivian economy has become increasingly dependent on the tourism industry, with the sector accounting for nearly 34% of direct Gross Domestic Product (GDP) in 2011 (almost 75% when counting both direct and indirect). However, tourism development in Maldives has been mainly private sector-driven

and previous tourism master plans have not always had a major influence on the directions of growth. Recently, government strategies have been aimed toward making regulatory framework more efficient and effective and cultivating sustainable investment in the sector through supporting infrastructure and increasing training and employment opportunities for locals while maintaining environmental sustainability.

Tourism activity and past resort development was concentrated in the central region of the country around the Malé International Airport. At present, the main tourism hubs are located on island resorts which are not indigenously inhabited. A major issue highlighted in the Fourth Tourism Master Plan (4TMP) was the deliberate separation of resorts from society in previous tourism policies with many technical jobs in resorts were being carried out by expatriates.

More recently, in order to bring direct benefits to island communities, development has been aimed towards other regions, especially the development in islands inhabited by locals. However, the central government has the challenge of limiting inappropriate, non-viable and ill-advised developments, while at the same time attempting to encourage local council engagement in tourism planning. Often, the inexperienced and under-resourced island councils have a limited view of tourism industry, with focus mainly directed towards resorts, city hotels and guesthouses.

The Addu Atoll differs from the usual tourist experience of the Maldives as the area is inhabited by locals. It has a population of 25,000 and tourists are allowed to move freely among the islands to experience the local culture and the way of life of Maldivian people. Approximately an hour's flight from Malé International Airport to Gan, this area has not yet been developed to the extent of the primary tourism resorts. Gan was an RAF base until March 1976.

Rationale and justification for project

The Maldivian tourism industry is mainly centered around Malé International Airport, while resorts in more regional areas do not experience the same level of tourist volumes. By creating a new tourism hub in Gan, an existing former British Royal Air Force airport, there could be more interaction with the nearby island communities.

The 4TMP suggests the development of a second international airport hub at Gan in Addu to serve the existing and planned new resorts in the southern atolls. One of the main benefits of the project would be the distribution of tourism from the central area towards more regional areas which have not been as affected by the successful tourism industry, opening up its economic benefits to a broader segment of society.

Details of project planning, development and operation

Creating opportunities for local communities to engage in tourism has been an aim in all previous master plans which is widely meet with enthusiasm and motivation amongst political leaders. However, accommodation is usually the first proposal. While accommodation is important, until now there has been little attention to the activities and attractions sector for generating opportunities for community participation in tourism.

According to 4TMP, community participation in tourism has the most potential when providing opportunities for existing tourist markets to engage with Maldivian communities. This can be achieved by learn about Maldivian lifestyles, fish on Maldivian fishing boats, buy Maldivian handicrafts, eat Maldivian food, learn

	something of Maldivian history and culture, etc.
Key success features and practices	✓ Regional development ✓ Community integration ✓ Using pre-existing infrastructure ✓ Investment in infrastructure ✓ Increasing private sector confidence ✓ Community-based tourism as a development tool linked to other agendas, e.g. environment; gender; conservation; cultural preservation; social harmony.
Sources of information	http://www.equatorvillage.com/ Ministry of Tourism Arts & Culture (2012) Fourth Tourism Master Plan 2013-2017 Vol 2: Background and Analysis DRAFT 1. Ministry of Republic of Maldives. Available: http://www.tourism.gov.mv/downloads/news/2012/4TMP_DRAFT_Vol_2_BACKGROUND_ANALYSIS.pdf

4.1.4. GAMBIA, ASSET

The 2006 Gambia Tourism Master Plan identified a series of product development and marketing strategies by which the country could move from being a largely European winter period, relatively low price, sun and sea destination to one that offered a wider range of attractions capable of attracting a greater number of market segments, especially more upmarket, higher spending tourists.

The objective of The Gambia's Vision 2020 for the tourism sector is defined as

> *"to make The Gambia a tourist paradise and a major tourist destination through product innovation, quality improvement, improvement of investment returns and diversification of The Gambia's tourism product".*

The Plan stated that achieving the Vision will depend on:
- continuous government support towards tourism,
- political stability,
- competitive product range,
- growing market demand,
- provision of relevant physical and social infrastructure,
- sound environment, and
- efficient institutional arrangements.
- streamlining the development process, by building capacity at national and local levels and by promoting a strong public/private sector partnership.

Significant progress has been made in recent years and travel and tourism is now the second largest contributor to the country's socio-economic development after agriculture, accounting for close to 15% of GDP in 2011. Apart from the foreign exchange earnings it generates, tourism is proving to be a significant factor in infrastructure development and inward investment. The country's resource strengths for tourism are its coastline but also the river network and historic sites which represent the potential for the further development of ecotourism and cultural tourism.

Gambia's tourism has been negatively affected in the past by social problems. A major initiative to combat these social problems and provide a clear pathway for Gambians to participate in the tourism sector and develop a strong sense of pride in their achievements is the ASSET (Association of Small Scale Enterprises in Tourism) programme.

Title & URL	**ASSET, The Gambia**  http://www.asset-gambia.com/
Type of good practice illustrated	• Pro - poor initiative • Informal sector - tourism linkage
Project description	In 2000, 69% of the population of The Gambia lived under the poverty line. This was mainly accounted for by low crop yields (due to soil infertility) in rural areas, where 70% of households were lower than the poverty level and unemployment in urban areas (46% lower than the poverty level) (Bah, 2006;2). The Gambia's primary activity was agriculture, and with secondary and tertiary activities still underdeveloped. The Gambia's past tourism development had a positive impact with regards to the building of infrastructure, institutional development, the establishment of a security apparatus and promotional activities. However, little was done with respect to developing strategies to link tourism consumption with local products and services.

The Association of Small Scale Enterprises in Tourism (ASSET) aims to encourage responsible tourism through the creation of linkages between tourism and the agricultural, informal and cultural/handicraft production sectors. ASSET aims to:

- Contribute to improving the tourism product in The Gambia and help to bring development for the country
- Provide assistance to members with product development, marketing, training, quality control and access to finance
- Work collaboratively, promote networking and joint activities amongst members
- Develop partnerships with government, other institutions and external organisations where appropriate
- Contribute to sustainable development within the Gambian Tourism Industry using principles and practice of Fair Trade in Tourism
- Identify appropriate quality standards for members
- The furtherance of good relations between ASSET and similar organisations in other countries
- The protection of small-scale business interests in the mass market tourist industry (http://www.asset-gambia.com/)

ASSET has undertaken many initiatives to link the benefits of tourism to the community in order to alleviate poverty, for example, the 'Destination Cluster' initiative to encourage capacity building and cooperation and the Gambia is Good (GiG) project linking horticultural producers to the tourism industry.

The initiative has been widely successful, with an increase of 132% mean daily turnover for juice pressers, increased trips and income per week for licensed guide, and increased earnings at craft markets, for example the market at Kotu Beach had average sales of 96.5 in 2001, which increased to 335.3 the following year (Bah, 2006; 5).

Rationale and justification for project

In strengthening the tourism sector and its affiliated industries, the benefits of tourism can be spread to broader segments of society.

Details of project planning, development and operation

ASSET was established in April 2000 in order to bring together, advocate for, and promote a large number of small enterprises that were active in the tourism industry in The Gambia. It has a membership of 80 small and medium enterprises including craft market vendors, tourist taxi drivers, official tourist guides, juice pressers, fruit sellers, and small hotel, guesthouses and ground tour operators who work together to help each other with marketing, product development and training.

Key success features and practices

- ✓ Promotion of responsible fair trade practise
- ✓ Poverty alleviation
- ✓ Tourism and agriculture linkages
- ✓ Creating consumer awareness
- ✓ Capacity building
- ✓ Consultation between stakeholders
- ✓ Private sector involvement
- ✓ More meaningful connections/experiences between tourist & host country

	✓ Stimulates entrepreneurship ✓ Increases community pride ✓ Triple bottom line: environmentally sound, socially just and economically viable
Sources of information	Bah, A. (2006) Challenges of Tourism for Local Communities The Gambian Experience Gambia Tourism Concern, The Gambia. http://www.accessgambia.com/information/asset.html http://www.asset-gambia.com/ **Images:** https://www.facebook.com/pages/ASSET-The-Gambia/359829882334?id=359829882334&sk=photos_stream

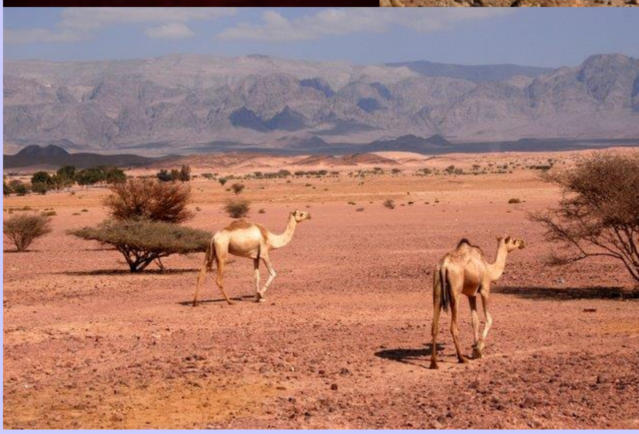
4.1.5. *JORDAN, FEYNAN ECO LODGE*

The Royal Society for Conservation of Nature in Jordan is one of the pioneers in the field and with initial assistance from the United States Agency for International Development (USAID) it has developed a model of excellence that protects the natural resources of the area on one hand while assisting income-generating activities on the other which in turn assist with its conservations work.

Without a focal development – the lodge – and a clear emphasis on protecting the environmental features in the area, the tourism products and experiences developed in the area risked being piecemeal, uncoordinated and potentially damaging to the very resources on which they were based. The Dana Reserve has 800 plant species, 449 different animals (including threatened species such as the sand cat and Syrian wolf) and represents the resource for a wide range of hikes and other tourist activities.

The development of the Eco-Lodge provided a base for these various activities and assisted the local community to develop a series of visitor experiences and products such as:

- Daily excursions in private or open group hikes with local Bedouin guides, or hiking trails that are recommended for individuals without guides,
- Nature hikes include wildlife and bird watching & identifying the indigenous plant species,
- Geological hikes examining the features of the Dead Sea Rift such as igneous exposures, mountains and canyons,
- Historical hikes including archaeological sites from the Stone and Bronze ages, the copper mines, Roman and Byzantine settlements and early Christian monasteries,
- Cultural Bedouin hikes in which the traditional way of life is explained. Highlights include meeting local shepherds and women walking to aquifers and having tea in a traditional Bedouin family's tent.
- Sunset and sunrise hikes
- Mountain biking

Title & URL	**Feynan Eco-lodge, Jordan**    http://www.feynan.com/
Type of good practice illustrated	Eco-tourism development, pro-poor development, private sector participation
Project description	In 2003 Jordan's Royal Society for the Conservation of Nature (RSCN) embarked on the construction of a purpose-built eco-lodge at the western gateway to the Dana Reserve which it manages. This gateway is Wadi Feynan, on the site of an old copper mining research base, and built with funds provided by USAID. Distant from roads and power supplies, the Lodge represented a brave attempt to create a unique tourism experience in Jordan and bring enhanced economic benefits to the Wadi Feynan Bedouins, who are among the most underprivileged tribal groups in Jordan and whose reliance on intensive goat grazing in the nature reserve is a cause of many ecological problems. Its location was also part of a strategic conservation initiative to use tourism to offset the threat of open-cast copper mining in the Feynan area. The development of tourism provides an alternative and more environmentally sustainable livelihood option. Feynan Ecolodge is located on Dana Biosphere Reserve, the largest reserve in Jordan. It covers 300km of land and attracts over 30,000 visitors per year and has won four international awards for sustainable development (rscn.org) There is a wide variety of wildlife, geology and landscape thanks to its uniqueness as the only reserve in Jordan in which four bio-geographical zones are included: Mediterranean, Irano-Turanian, Saharo – Arabian and Sudanian. The Feynan Ecolodge is an exceptional, beautiful building which has won a number of architectural awards. It has been listed as one of the top fifty ecolodges in the world

	by National Geographic Adventure Magazine. Taking influences from ancient caravanserai and Yemeni architecture, it provides 26 rooms, all organically shaped and different in layout. It incorporates environment-friendly features, including solar power, high insulation, and passive ventilation systems, fires are lit using a renewable bi-product from the olive harvest, food excess and waste is composted to use as fertilizer. Waste is kept at a minimum through the use of recyclable material, e.g. Clay jars instead of plastic water bottles in guests' bedrooms. In the absence of mains electricity, it is lit at night by candle light which gives a very special atmosphere to the building and creates an unusual attraction for tourists. It was opened in September 2005. By the end of 2006, it had already attracted sufficient visitors to cover its operational costs and made a small profit. In 2010, the initiative was successfully handed over to the private sector for operation as a viable ecotourism business.
Rationale and justification for project	This project represents a good example of eco-friendly, pro-poor tourism and successful private sector participation.
Details of project planning, development and operation	RSCN has been one of the pioneers of nature conservation in the Arab region. It was founded in 1966 when a main concern was the drastic fall in numbers of animal species due to illegal hunting and general disregard for the natural world. The organization, a Jordanian NGO, instigated efforts to replenish the numbers of endangered species, many of which had reached the edge of extinction. Since that time, RSCN has seen the establishment of seven protected areas scattered throughout Jordan, covering over 1200 square kilometres in some of the finest natural landscapes in the country, offering protection to wildlife and ecosystems. Wild Jordan is the business division of RSCN aimed at socio-economic development and ecotourism activities. It manages income-generating programmes for local communities in and around RSCN's protected areas. These businesses aim to bring tangible economic and social benefits to local communities and raise awareness and support for nature conservation nationally. The Feynan Ecolodge project was developed with support from USAID.
Key success features and practices	✓ Environmentally friendly ✓ Linked to nature conservation ✓ Pro-poor ✓ Public-private partnership
Sources of information	http://www.feynan.com/ http://www.rscn.org.jo/ http://www.rscn.org.jo/orgsite/Group1/AboutWildJordan/TheDanastory/tabid/187/Default.aspx ESCWA (2011) Environmental goods and services in the ESCWA region: Opportunities for small and medium-sized enterprises. New York. http://www.rscn.org.jo/orgsite/Group1/AboutWildJordan/tabid/162/Default.aspx

4.1.6. LEBANON, SHOUF BIOSPHERE RESERVE

The Shouf Biosphere Reserve project is another example of using tourism as a tool for the protection of the natural environment of the area, while creating economic opportunities for local communities. It ensures that tourists are properly informed by trained guides and blends experiences related to the natural features of the area with cultural components, bringing benefit to the local communities.

The UNESCO World Network of Biosphere Programmes, of which the area is a part, has three main functions: ***conservation*** (protection of cultural diversity & biodiversity), ***development*** (environmentally & socially sustainable development which is culturally appropriate) & ***logistic support*** (capacity-building and knowledge-generating through education, project demonstration, research and monitoring).

Since 2010, the strategy for the development of the Al-Shouf Cedar Society rural development programme in the area has included:

- Expanding to new outlets
- Creating a more focused product range based on best sellers
- Focusing on quality improvement
- Modifying prices to 'premium prices' (high end)
- Developing sales during off-peak season, through targeted outlets such as stalls at festivals, guesthouses, exclusive outlets & existing networks

Products developed and activities available include:

- Hiking in the Reserve with local guide (more than 230km of trails)
- Traditional meals
- Village cultural tour with local guide
- Accommodation at local Guesthouse
- Biking tour in the surrounding villages (20 bikes available to rent)
- Donkey riding (4 donkeys available)
- Snowshoeing (19 snowshoes available)

Planned future activities to develop include:

- Meditation
- Cross-country skiing
- Nature watching
- Educational activities
- Adventure activities (rope sports, mountain biking in a closed park)
- Events & Festivals

Title & URL

Shouf Biosphere Reserve, Lebanon

< **http://www.shoufcedar.org/>**

Type of good practice illustrated

Tourism product development to benefit local people and the environment through the successful coordination of multiple players.

Project description

The Shouf Biosphere Reserve (SBR) covers about 5 percent of the overall area of Lebanon and extends along the ridge of the western chain of Mount Lebanon. 70,000 people are living around the biosphere reserve, whose territory is shared by 24 different municipalities belonging to 3 different districts. The region includes some of the last native stands of Cedrus libani, the famous Cedars of Lebanon and has become a much visited part of the country due its natural beauty. It attracts domestic, regional and international tourists.

The SBR encourages the use of tourism as a tool for conservation. Tourism management has focused on interpretation and guiding, visitor safety, eco-tourism activities, local guesthouse development, visitor information and marketing, small scale visitor attractions, and the restoration of traditional buildings and footpaths and hiking trails. It also places strong emphasis on environmental education.

A key tool used by the Reserve, is the development of ecotourism packages. These packages are usually composed of 1 day hiking in the reserve, 1 overnight in the guesthouse & 1 cultural tour at the villages, with varied options available. They are designed to give the visitor an introduction to the unique attraction while benefitting local communities directly. Packages encourage an authentic experience of 'slow travel'.

In 2005, the area became part of the UNESCO World Network of Biosphere Programmes (WNBR). Launched in 1976, the WNBR is part of the Man and Biosphere

	Programme which aims to enable the protection of nature without entirely restricting it from the human population. Following UNESCO designation, the reserves are now governed at a national level, while still coordinating at regional and international scales through the network. The Al-Shouf Cedar Society (ACS) has been running a rural development project since 1999. About 82 different traditional products are made by members of the local community (mainly women) using traditional methods. Products include marmalade, herbs, jams, beverage, distilled waters and craftworks. These are sold under the Shouf Biosphere Nature Reserve label. In 2008, revenue of ca. $28,000 was made (http://www.shoufcedar.org/pub/Marketing Strategy Final.pdf). 50% of the revenue is spent on the cost of production, (locals are reimbursed for their raw material and paid for their labour). Products are sold at the park entrances, where reserve guides are responsible for sales and promotion (receiving 15% of revenue), 25% goes to an agent who has the role of organisation of production.
Rationale and justification for project	Lebanon is a country where natural beauty (and tourism potential) is challenged by changing agricultural practices, rural unemployment, poor planning control and the extensive development of second homes. The SBR project is successfully addressing nature conservation and landscape preservation through eco-tourism, to the benefit of local people. It is a good example of responsible tourism.
Details of project planning, development and operation	In 1996 the area was officially declared a nature reserve under Lebanese law. It is under the authority of the Ministry of Environment (MoE). The area is managed by the Appointed Protected Area Committee (APAC). APAC's committee members include ACS, mayors of the larger villages and independent environmental experts. The daily management and planning of the park is the responsibility of the Management Team, who, along with local guides comprise of about 25-30 individuals. The Management team also liaise with various local, national and international stakeholders through a series of workshops. Such stakeholders play an important role in the development and planning of the SBR as supporters, partners, contractors, beneficiaries, and providers of technical and financial assistance.
Key success features and practices	✓ Rural tourism development ✓ Local engagement and employment ✓ Coordination of multiple players ✓ Building on traditional skills ✓ Strong environmental focus ✓ Strong educational focus ✓ Regional networking and information-sharing
Sources of information	http://www.shoufcedar.org http://www.unesco.org/new/en/natural-sciences/environment/ecological-sciences/biosphere-reserves/arab-states/lebanon/shouf http://www.shoufcedar.org/pub/Eco-tourism Strategy Final.pdf Site visit, July 2012

4.1.7. *QATAR, ASPIRE ZONE*

The award by the International Federation of Football Associations (FIFA) of the 2022 World Football Cup competition to Qatar has provoked the Qatari authorities into planning the development of a wide range of attractions and activities catering for the large influx of visitors anticipated for the event. Past tourism to Qatar has been in the form of business and high end demand focussed on the luxury hotels in Doha. In recent years, however, the State of Qatar has established outstanding education and sports facilities that have attracted both students and sports participants.

Qatar was largely closed to tourism until 1995. The 2004 Tourism Master Plan led to $15 billion being earmarked to develop the tourism value chain by building and attracting top hotels; creating flagship museums and other attractions; and vastly expanding the national airline. Its goal (now exceeded) was to triple annual tourist arrivals to 1.4 million.

Qatar has developed five significant tourist attractions funded through the public purse:

1. The internationally acclaimed Museum of Islamic Art,
2. The 2005 redevelopment of Souq Waqif,
3. The Katara Cultural Centre,
4. Mathaf: Arab Museum of Modern Art, and
5. The Corniche Bay.

These represent the cornerstone of the image presented of the country to the outside world, along with the modern urbanscape of skyscrapers of original and striking design in Doha, the dunes, oryx, falcons and camels. There is very little that is accessible outside Doha. There are, however, many archaeological sites spread throughout the country, scenically stunning dunes, an inland sea, and other natural features such as Bin Ghannem Island.

Recognising the challenge facing the State in preparing for the World Cup, Qatar has embarked on constructing a major rail system linking the various stadia, and has developed a new tourism strategy, as well as identified a series of tourist attractions and activities to be fast-tracked into development with government support. The Qatar Tourism Authority and Qatar Museum Authority are working closely together to develop cultural and natural heritage attractions outside Doha. The recent signing of an accord with the UNWTO will bring assistance to Qatar in the development and management of its tourism sector.

Title & URL	**Aspire Zone, Qatar**


<http://www.aspirezone.qa/Home/index.aspx>
< http://www.qatartourism.gov.qa/en-us/thingstodo/activities/sport.aspx>

Type of good practice illustrated	Sports tourism
Project description	Qatar has positioned itself as a top class destination for sports tourism and has attracted much business and international exposure from international sports federations, national sports associations and global sports events thanks to its world-class athletic facilities. It has been successful in establishing itself as a prime location for major sports competitions, pre-competition camps, conferences, sports research, injury diagnosis, treatment and rehabilitation. As one of the fastest growing sectors in the travel industry, sports tourism plays a major role in the global tourism industry. Sports tourism is generally comprised of two components – active sports tourism and passive sports tourism i.e. visitors who travel to participate in sports activities and those who travel to watch sports activities. Qatar's positioning as a major sports destination has focussed on both of these aspects through the Qatar Tourism Authority (QTA) and the management planning organisation 'Aspire Zone Foundation' (AZF). The AZF has developed world class facilities and services for those participating in the many sports Qatar has to offer. Marketing Qatar as a brand has a key role in establishing international dominance in sports tourism. The AZF and QTA have put much effort into building brand awareness as a world class sporting destination and service provider and into attracting clients and partners. Key international events have helped to concrete Qatar as a top sports destination. The development of their media platform is particularly prominent, putting efforts towards engaging a consistent local and international presence. Throughout the year, major international events showcase Qatar and help raise awareness, including the Asian Football Cup in 2011, the IAAF World Indoor Championships in 2010, the 2004 World Sports Conference and the annual FIM Moto Racing World Championships. Following the success of the 2006 Asian games, Qatar has received continued international recognition and the Aspire Zone was voted the World's Leading Sports Tourism Development project at the World Travel Awards and its successful bid to host the **FIFA 2022 World Cup** in Qatar confirmed its global position as a Sports destination.
Rationale and justification for project	Part of Qatar's national strategy of major investment in tourism infrastructure, to broaden its economic base beyond petro-chemicals.
Details of project planning, development and operation	The 240 hectare development 'Aspire Zone' was designed for the 2006 Asian games. It is located 8km from Doha's Central Business District. Sports stadiums, medical facilities, educational services, a sports academy, mosque, sports clubs, retail areas and parklands - all of professional standard - are located within it. In terms of active sports tourism, participators are attracted by the high quality and large range of facilities available at Aspire, such as the world's largest indoor sports venue, 13 independent playing fields, the Hamad Aquatic Centre and the Women's

	Sports Hall, etc. Through these elite facilities, Aspire is becoming an important brand in professional sports training, with many international sports stars associated with sport in Qatar. The Aspire Sports Academy was established in 2004 as a leading sports training academy, particularly focused on Football, Athletics, Squash and Table Tennis. Some of the programmes run by Aspire Academy are international sports scholarships, such as the 'Aspire Football Dreams' – a programme which is aimed towards seeking future talent in world football. Over two million young footballers have been tested since the programme began in 2007 in 15 developing countries throughout Asia, Latin America and Africa. For passive sports tourism, there is a yearlong calendar of major sports events which attracts international supporters; for example, Qatar is one of the first hosts of the season of the Association of Tennis Professional's (ATP's) World Tour, which attracts major tennis personalities bringing much international publicity. As well as the AZF's strategic planning role, the QTA is a key player in the development of Qatar as an elite sports destination. The need for collaboration and planning at a national level is essential to Qatar's success as a tourism destination. The QTA has a vital role in these processes. Last year, the QTA held one of the largest conferences on Sports in the Middle East. The Qatar Sports Forum gave stakeholders in the tourism industry the opportunity to discuss the planning and development of Qatar as a leading sports destination.
Key success features and practices	✓ Collaboration with private sector stakeholders ✓ Facilities of the highest quality ✓ International media & televised events improve host nation image & brand ✓ Major multimedia exposure through international sporting events & professional sports personalities ✓ Collaboration with national airline ✓ Economic successes – increased investment, job creation, foreign exchange, increased local sales, etc ✓ Improved community pride ✓ Increased local sports participation ✓ Sport as a motivator of regional cooperation
Sources of information	http://www.traveldailymedia.com/142401/sports-tourism-on-qatar%E2%80%99s-agenda/ Standevan and De Knop, Sport Tourism. T. Hinch and J. Higham, 'Sport Tourism: A Framework for Research', International Journal of Tourism Research, 3, 1 (2001), 45–58. http://www.qatartourism.gov.qa/en-us/thingstodo/activities/sport.aspx - sthash.1MbwdIKt.dpuf

4.1.8. BENIN, ITC-UNCTAD

Benin is a country that is seeking to utilise its natural resources for the development of tourism for the benefit of local communities. It has a current training programme through the German Government overseas aid programme for small game hunters, tourist guides, trackers, accommodation keepers and carrier owners. Through value chain analysis (see discussion in sub-section 1.2.) it has identified backward linkages whereby local people can supply goods to operators and directly to tourists themselves (e.g. through the transformation of water hyacinths into saleable products).

Tourism provides a wide range of economic opportunities, especially for developing and least developed countries, but often without inclusion of poor segments of the population e.g. handicrafts sold to tourists are often imported due to limited local capacity and quality, and many hotels and restaurants import supplies of fish, vegetables and fruit because of the reliability of supply and quality compared with locally-sourced products.

The rationale for identifying and developing business linkages for poverty reduction is as a response both to:

- increased interest from hotel chains, restaurants and tour operators to invest more in local sourcing and provide their clients with an "authentic" experience, and
- the limited capacities and skills of entrepreneurs to meet the quality requirements of the tourism industry.

The term "inclusive tourism", not to be confused with the similar term used in the tourism marketplace to denote several elements in a holiday trip combined, is defined as tourism that seeks to include all indirect suppliers to the direct tourism operators. As such, it is seen by the ITC-UNCTAD as a scaling up from community-based tourism, extending the reach of tourism in, and benefits to, local society[86].

The process starts with an in-depth feasibility assessment identifying products and services currently sourced from abroad that could be obtained locally in the destination. Training and advice are given to local groups on the capacity, consistency and quality requirements of the tourism operators. Assistance is given in business negotiation and contracting.

A three phase programme of analysis and assessment can be followed: diagnosis of the present situation and context, prioritization of project opportunities (through a value chain analysis exercise), leading to a work plan. Linking agriculture to tourism markets is an example. The goal is to provide capacity building and facilitate partnerships between agro producers and tourism operators, by providing farmers and fishermen with the tools they need to assess the tourism market, and the buyers with the skills to develop sustainable partnerships with local producers. Similar programmes can be developed for the providers of local artistic and cultural services, and for handicrafts makers.

[86] Inclusive Tourism: Promoting Backward Linkages. UNCTAD-ITC. Marie-Claude Frauenrath. Expert Meeting on Tourism's Contribution to Sustainable Development. March 2013

Title & URL

ITC-UNCTAD, Benin

http://www.benintourism.org/

Type of good practice illustrated

Inclusive tourism: Promoting backward linkages

Project description

Tourists are increasingly searching for the 'authentic' experience and growing concerns about the sustainability of the travel industry, therefore hotel chains restaurants and tour operators are investing more in local sourcing. However, often stakeholders in the private sector do not have the capabilities to meet the quality expectations of international tourists.

Inclusive tourism is an integrated approach to developing sustainable and inclusive business linkages within the tourism industry. While community-based tourism aims to bring the benefits of tourism into local communities, inclusive tourism attempts to view the entire tourism product, aiming for more dispersal of the benefits, geographically and socially. By creating a backwards link along the supply chain of the tourism product, capacity building programmes can reach the poorest sectors of society. Main characteristics of the inclusive tourism are:

- **Feasibility assessments**: to identify products and services currently sourced from abroad by the tourism industry which could be sourced locally
- **Stakeholder meetings:** to identify business opportunities and to highlight how a demand-driven approach can link them with local producers
- **Enhancing supply capacity**: illustrating the necessity of consistency and quality standards to meet the demand requirements of the tourist industry
- **Providing market expertise & formal market linkages**: assist in business negotiation and contracting
- **Developing institutional capacities:** strengthening support services for the industry and affected communities
- **Provide policy advocacy:** aim to influence public policy in relation to resource allocations, planning, development, laws, etc.
- **Facilitate partnerships with private actors:** to stimulate local economy
- **Gender equality**: promote the involvement and integration of women and youth
- **Emphasise the three pillars of sustainability** – environmental, social and economic
- **Working with existing** tourism destinations and existing supply sectors.

	In Benin, the International Trade Centre (ITC) and United Conference on Trade and Development (UNCTAD) undertook an initiative to promote sustainable and inclusive tourism. The project's main initiatives were: helping to process and sell 100% organic soaps for the local tourism market, Abomey; building the techniques of local craft makers to transform water hyacinths into sellable products in Ganvié; and upgrading the services in the Tourism Office, Oidah, with new promotional materials and tools. Capacity building is the main aim of inclusive tourism, providing links between producers and tourism markets, e.g. local artistic and cultural services, environmental management, handicrafts and agrifood. This is achieved through targeting specific audiences such as public sector offices, private sector association, micro, small and medium size enterprises, NGOs supporting the sector, producers associations, the private sector and individual producers by building awareness, providing information training and efficient guides.
Rationale and justification for project	Tourism provides a wide range of economic activities, especially for developing and least developed countries. However, often the poorer segments of society are marginalized from these opportunities.
Details of project planning, development and operation	The UNCTAD promotes the development-friendly integration of developing countries into the world economy. UNCTAD has progressively evolved into an authoritative knowledge-based institution whose work aims to help shape current policy debates and thinking on development, with a particular focus on ensuring that domestic policies and international action are mutually supportive in bringing about sustainable development. Its main activities include consensus building, research and technical assistance. The ITC is a subsidiary organization of the World Trade Organization (WTO) and the UNCTAD whose mission is to foster sustainable economic development and contribute to achieving the Millennium Development Goals (MDGs) in developing countries and countries with economies in transition through trade and international business development.
Key success features and practices	✓ Poverty reduction and social inclusion ✓ Capacity building ✓ Gender equality ✓ Sustainability ✓ Institutional support
Sources of information	
Sources of images	https://www.facebook.com/TopWorldBenin http://www.bubblews.com/news/308153-water-hyacinths-a-weed-or-a-beautiful-flower

4.1.9. TUNISIA, THALASSOTHERAPY

Tunisia's tourism development was narrowly focussed on beach resorts. Only in the past few years has the need been recognised to develop a wider product range to appeal to more markets and segments within those markets. Seeking to diversify its tourism product offering away from mass, beach tourism, Tunisia has pursued a policy of innovation through developments in the areas of desert experiences, MICE and golf.

Tunisia's Tourism Strategy to 2016 stresses the importance of tourism product innovation and diversification. It identifies four key strands to this approach:

1. The development of a quality charter for all tourism professionals
2. The encouragement of innovation by supporting and rebuilding the tourist areas
3. Diversifying the types of tourist accommodation, by encouraging new forms
4. Strengthening the supply chains of diversification i.e. business tourism, cultural tourism, ecotourism, golf tourism[87]

Many developments are still at the planning stage, particularly **ecotourism,** facing delays in policy development, funding, and approvals, such delays being the price to be paid for ensuring that projects are sustainable.

There has been focus in Tunisia on the sustainable development of tourism and ecotourism in two different areas: the Sahara Desert and the north coast islands. Coastal resorts have long been the face of Tunisia's tourism industry, but recently the shift has been towards visions of developing tourism opportunities in the Sahara, as well as developing ecotourism resorts on the coast.

Sea water and seaweed-based treatments developed through French Government assistance have enabled the country to successfully exploit a completely new product: market area related to the coastal areas.

Title & URL	**Thalassotherapy, Tunisia**  **< http://www.bonjour-tunisie.com/**
Type of good practice illustrated	Product diversification
Project description	Tunisia's approach to tourism has been a classic illustration of mass tourism focused around package vacations organised by Europeans tour operators. Until the Arab Spring of 2011, up to 80% of Tunisia's international arrivals came in air inclusive

[87] Tunisia's Tourism Strategy for the Year 2016.

	tours (including transport and transfers) seeking sun, sand and sea. In 2010 Tunisia attracted 6.9 million visitors. Tunisia has been positioned as an inexpensive beach destination and the 1970s and 1980s has witnessed a hotel construction boom stimulated by tax breaks for investors: High borrowings combined with low profitability subsequently causing problems for industry quality. With just over 34,000 bed capacity in 1970, the industry had grown to a capacity of more than 230,000 by 2008. Significant problems relating to high volume and low prices were evident as room supply exceeded demand and re-investment in ageing hotel stock was needed. As in Egypt in recent years, tourism development in Tunisia has taken place mainly in coastal tourist zones, which are usually physically separated from native residential and commercial areas. Product diversification and specialisation (e.g. desert experiences, meetings, incentives, conferences and exhibitions (MICE) and golf) as well reinvestment in hotel stock became priorities. Thalassotherapy is seen as an important means of lengthening the season as it is not weather-dependent. Thalassotherapy comes from the Greek language thalassa or sea. Tunisia has become the world's number two thalassotherapy destination (after France) and aspires to be the world's number one. Modern thalassotherapy involves therapeutic treatments, in a comfortable, luxurious setting, which evokes the ambiance of a vacation rather than that of a medical clinic.
Rationale and justification for project	Illustrates the development of a quality-orientated product to diversify Tunisia's tourism offer with a specific target market in mind.
Details of project planning, development and operation	Tunisia is concentrating on wellness tourism in its marketing approach. The Office National du Tourisme Tunisie (ONTT) has established a new products department with responsibility primarily for product development, but also with the specialist product knowledge to be able to assist at specialist exhibitions such as Thermo in Paris. A product marketing brochure is produced in cooperation with the industry featuring thallaso product and thallaso is specifically highlighted at relevant trade shows. ONTT concentrates much of its marketing effort on attracting journalists to Tunisia to write about the product. In the case of wellness and thalassotherapy, specialist journalists are sought. The Ministry of Health regulates thalasso centres. In 2006, a new Decree was issued, cancelling the previous regulations of 1992 governing standards in thalassotherapy centres in Tunisia. Thalasso Centres are operated by private sector hotel groups.
Key success features and practices	✓ New product development ✓ Training, quality and standards ✓ Special interest marketing
Sources of information	Site visit 2008. http://termasworld.com/content/view/198/45/lang,en/ http://www.bonjour-tunisie.com/tunisie-Thalasso et bien %C3%AAtre-598.htm

4.1.10.Egypt, El Gouna

El Gouna's grassroots environmental organization, Green Gouna, was founded in 2002 by a group of concerned residents. The goals of Green Gouna are to help develop the resort as an ecotourism destination. Green Gouna pursues this goal by involving the entire community in protection and preservation through education, recycling, clean-up campaigns, festivals and the establishment and the enforcement of environmental standards and guidelines. El Gouna's Eco-Festivals have helped promote the Green Gouna campaign and enlisted the participation of local businesses, hotels, and residents. Past festivals have included educational seminars and activities on conservation as a means for participants to learn how to value and protect their environment and living space.

- Earth Day is celebrated bi-annually to increase public awareness of and support for important conservation issues.
- There is an ongoing push in El Gouna to eradicate the use of plastic bags, replacing them with recyclable paper bags or other re-usable materials.
- Installation of recycling bins for glass, paper, plastic and cans in El Gouna.
- Conservation awareness campaigns directed to staff, residents and visitors.
- Establishment of an educational photo gallery on El Gouna wildlife.
- Installation and maintenance of mooring systems for diving boats in cooperation with the Hurghada Environmental Protection and Conservation Association.

The El Gouna resort development area is an example of the way in which a major project can still maintain strong environmental standards and demonstrate a high level of corporate social responsibility, with lessons of relevance to similar large scale developments in other countries.

Title & URL	**El Gouna, Egypt**
	   http://www.elgouna.com/

Type of good practice illustrated	Large scale tourism development
Project description	El Gouna, Egypt is a resort of 17 hotels built along 10 kilometres of beachfront on the Red Sea. It spreads across islands interlinked by lagoons and is the culmination of a 20 year vision of Samih Sawiris, chairman of Egypt's Orascom Hotels & Development to create an ecologically friendly resort city. Several hotels, the marina town, golf club and villas were designed by award winning Egyptian and international architects and its quality infrastructure and excellent services as well as natural beaches and year-round sunshine have allowed it to become one of Egypt's top destinations. It has been officially recognized as Egypt's most environmentally-friendly holiday destination, and El Gouna management has worked hard in cooperation with local hotels, businesses, residents and visitors to maintain, protect, and preserve its unique environment. The town's environmental programs and grassroots environmental organization have won several prestigious awards, including Travelife and the Green Globe. In collaboration with Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Orascom created a centre of excellence in the German Hotel School, El Gouna. In addition the Green Star Hotel Initiative aims to improve environmental standards in the Egyptian hotel industry: El Gouna has served as the pilot location, and the progress that has been made over the course of the previous year has illustrated that a national ecolabel can serve as a valuable tool in combating the environmental risks posed by the country's rapidly expanding tourist sector. Green Star Hotel, developed as a public-private partnership involving the Egyptian Ministry of Tourism, AGEG Consultants, Orascom and Travco, is the first ecolabel designed to address the specific conditions of hotels and resorts in the Egyptian tourist industry with the aim of minimizing their impact on the environment while maximizing their appeal to foreign guests. El Gouna has installed farming projects to locally grow organic products and produces a great variety of highly beneficial organic fare. The farm has received certification under the US National Organic Standards for organic produce, as well as certification from the Centre of Organic Agriculture in Egypt, which operates in accordance with EU standards. The town's food waste goes to feeding farm animals, while organic waste is used as fertilizer for the surrounding landscape. El Gouna produces its own water by desalinating sea and well water and utilizing treated waste water for irrigation of the golf course and greenery throughout the resort. El Gouna practices garbage separation and recycles materials locally, a zero-waste management system has been implemented and over 85% of El Gouna waste is recycled. El Gouna's Solid Waste and Recycling Plant was established in the early 1990s. There is also an ongoing campaign in El Gouna to eliminate the use of plastic bags, and replace them with recyclable paper bags or other re-usable materials.
Rationale and justification for	Growth in tourist numbers in recent years has increasingly put pressure on the fragile environment. El Gouna is widely regarded as the one of most successful green field

project	developments on Egypt's Red Sea Riviera.
Details of project planning, development and operation	Orascom Development Holdings AG is a publicly quoted property development company with 14,700 employees which engages in the development of integrated towns in Egypt, Jordan, the United Arab Emirates, Oman, Switzerland, Morocco, the United Kingdom, Montenegro, and Romania. In 2002, Orascom, in collaboration with GIZ launched the pilot Green Gouna initiative which has evolved into the nationwide Green Star Hotel initiative which aims to implement environmentally sustainable management into Egypt's hotel industry. The Green Star Hotels Initiative rates hotels by their environmentally-sound quality standards, such as waste recycling, water management, planting projects. The initiative provides a practical toolkit in the form of a guidelines manual, graphic marketing tools and training tools and applies the standards of the VISIT Association (www.yourvisit.info) In 2012, when the programme was being launched nationwide, 34 out of the 51 hotels across Egypt were actively participating in the pilot schemes were already Green Star Hotel Certified. (greenstarhotel.org)
Key success features and practices	✓ Commitment to high quality design and master planning ✓ Commitment to the highest environmental standards ✓ Strong corporate social responsibility (CSR) ✓ Commitment to education ✓ Replication in other developments
Sources of information	http://investing.businessweek.com/research/stocks/snapshot/snapshot.asp?ticker=ODHN:SW http://www.greenstarhotel.org/ http://www.orascomdh.com/en/about-us/social-responsibility/environment.html http://www.orascomdh.com/ http://hotels.elgouna.com/greenstarcertificates=~70=~16=~1=~1.aspx

4.1.11.SILK ROAD – MULTIPLE COMCEC MEMBER AND NON-MEMBER COUNTRIES

Tourists do not recognise administrative boundaries. Their interests and activities typically span several local administrations and multi-country itineraries are common. This creates the need for collaboration and cooperation, including the harmonisation of border entry requirements, leading to significantly increased tourist activity. Through a regional approach to forms of tourism product development based on interests and themes that transcend national boundaries, and a regional approach to marketing them, the whole can certainly exceed the sum of the parts.

There are many examples of countries forming regional association (e.g. PATA–Pacific Asia Travel Association; CTO–Caribbean Tourism Organization; ETC–European Travel Commission). The UNWTO, by virtue of its extensive 156 state membership, is at the forefront of encouraging and facilitating regional cooperation projects, mainly in respect of destination region marketing and promotional strategies and campaigns, and human resource development programmes.

The concept of a Silk Road tourism project was first raised at UNWTO's General Assembly in Indonesia in 1993. Encouraged by renewed interest in the Silk Road – for cultural exchange, trade and tourism, UNWTO decided to revive the ancient routes as a tourism concept, uniting three continents. Working closely with UNESCO, UNWTO Silk Road Programme linked 25 countries as diverse as Italy, Uzbekistan and Japan together, offering a travel concept focussed on cultural and natural heritage, and travel diversity (Land and Sea routes). It established a tourism concept which benefits both host communities (capacity building programmes, local empowerment, business networking, etc.) and travellers (by creating a more enriching travel experience). An annual action plan is implemented through the Silk Road Task Force consisting of nominated representatives from National Tourism Organizations, UN agencies, and the private sector.

Title & URL

UNWTO Silk Road Programme

http://silkroad.unwto.org/en

Type of good practice illustrated

Regional cooperation between different countries

Project description

The UNWTO Silk Road Programme is a collaborative initiative aiming at enhancing sustainable tourism development along the historic Silk Road route. The programme comprises 31 member states, 17 of which are COMCEC states[88].

The key objective of the Silk Road Programme is to support the adjacent communities in maximizing the benefits of tourism while stimulating investment and promoting the conservation of the route's natural and cultural resources. This is being achieved through greater cooperation between the Silk Road countries and by creating a unique Silk Road travel experience.

The ancient Silk Road, dating back to 200 BC, was an important vehicle for trade and formed a channel of contact between the East and the West, especially between the ancient empires of China, India, Persia and Rome. It inspired the exchange of dialogue,

[88] Silk Road Programme member states:
COMCEC Members
Albania, Azerbaijan, Bangladesh, Egypt, Indonesia, Iran, Iraq, Kazakhstan, Kyrgyzstan, Pakistan, Saudi Arabia, Syria, Tajikistan, Turkey, Turkmenistan, Uzbekistan
Non-COMCEC Members
Armenia, Bulgaria, China, Croatia, DPR Korea, Rep. Korea, Georgia, Greece, Israel, Italy, Japan, Mongolia, Russia, San Marino, Ukraine

	art, religion, ideas and technology. On a route of 12,000 kilometers this diverse cultural heritage, together with the natural attractions alongside the route, forms the basis for a differentiated tourism experience. The UNWTO pursues the intended objectives by focusing three key areas of activity: First, a universal Silk Road brand identity and image is being marketed, e.g. by the development of a comprehensive Silk Road website and by promoting positive news stories and improving the accessibility of information on the destinations. Secondly, UNWTO implements capacity building programmes for destination management and heritage conservation and supports the development of the tourism routes for a better connectivity. Finally travel within the adjacent destinations and across international borders is being facilitated, e.g. by working towards the development of a Silk Road tourist visa.
Rationale and justification for project	The Silk Road Programme is an excellent example of successful tourism cooperation amongst a cluster of very diverse countries, more than half of which (17 out of 31) are COMCEC member states. The UNWTO in its role as leader of the Silk Road Programme provides the basis for this corporation and hereby facilitates the process of developing a collective tourism product.
Details of project planning, development and operation	There are four key groups responsible for managing and implementing the major activities, which are the UNWTO, other UN Agencies, the Silk Road Task Force and the Silk Road Member States. The UNWTO as leader and driver of the Silk Road Programme provides the collaborative platform for the building alliances; it coordinates the logistics and major events and communicates the progress. The input, endorsement and support of diverse stakeholders is essential for the success of the Silk Road Programme. Other stakeholders include UNWTO Affiliate Members and private sector stakeholders, Partner UN agencies, Educational institutions and NGOs and other entities.
Key success features and practices	✓ Maximizing tourism benefits for all Silk Road destinations ✓ Development of a seamless tourism product ✓ Strengthening cooperation of the Silk Road stakeholders ✓ Commitment for sustainable tourism development through improved cultural and environmental management ✓ Coordinated marketing of a universal Silk Road identity ✓ Capacity building programmes focused on destination management and heritage conservation ✓ Travel facilitation, e.g. through development of Silk Road tourist visa
Sources of information	http://silkroad.unwto.org/en http://aric.adb.org/initiative/world-tourism-organization-silk-road-project

4.1.12. UNITED ARAB EMIRATES, RAS AL-KHAIMAH/REAL MADRID

A number of countries are developing major leisure complexes associated with international brands. This is particularly relevant in the Middle East targeting the family market from Saudi and other oil rich states, as well as the Asian tourist who is strongly attracted to high profile branded goods, and the western holidaymaker. Examples are:

- the developments in Yas Island, Abu Dhabi (featuring Ferrari World – the largest indoor amusement park in the world, Yas Marina round which is the Formula One motor racing circuit, the Warner Bros theme park, Yas Waterworld as well as a range of hotels and what is claimed to be the “world’s most complete shopping experience”), and
- planned developments in Qatar (in Lusail City ahead of the 2022 FIFA Soccer World Cup).

These integrated entertainment, events and resort complexes are targeted at the luxury tourist identified in sub-section as a growth segment. The justification for such developments is that they use land areas without any significant environmental quality and where there are small existing populations, thereby making the economic justification more telling. The Yas Island development, for example, transformed 75km^2 of desert into what the developers say is a “leisure oasis”.

Sport combined with entertainment is a powerful draw, reflecting the worldwide interest through satellite broadcasting of major international sports competitions and events, and the increasingly sophisticated marketing and merchandising of products related to the most famous players in the featured sports. One of the world’s biggest and best supported football clubs, Real Madrid, is developing the world’s first ‘sportainment’ destination on Al-Marjan Island in Ras Al-Khaimah (RAK) in the United Arab Emirates. The island is to be home to where UAE's first Waldorf Astoria, Rixos Bab Al Bar, DoubleTree by Hilton and the Real Madrid Resort.

Title & URL	**Real Madrid at RAK** http://www.rasalkhaimahtourism.com/ 
Type of good practice illustrated	• Sports tourism • Master planning • Brand alliance

Project description	The 50-hectare Real Madrid resort will be the flagship of the Al-Marjan Development and aims to attract one million visitors a year when it is completed. RAK had been chosen for the pioneering project due to the Emirate's location, equidistant between Europe and the Far East, home to half the estimated 300 million fans and followers of the club. The first recreational tourism complex built under the Real Madrid trademark will be a comprehensive sporting destination complete with luxury hotels, a marina and amusement park featuring the use of latest technologies such as hologram animations. It will also house a 10,000-seat stadium, the first in the world to open directly open to the sea, as well as sports facilities, a club museum, shopping mall, private beaches and residential areas. The development is a decisive step forward towards the Emirate becoming a tourism destination in its own right. By 2021, RAK expects around 20 percent of its GDP will be generated by tourism-related activities.
Rationale and justification for project	This is a good example of major tourism investment designed to attract specific niche markets of scale.
Details of project planning, development and operation	The project has been developed as part of RAK's tourism master plan which aims to position the Emirate as a premier affordable luxury destination for leisure, adventure and business travel.
Key success features and practices	✓ Market-led development ✓ Master planning
Sources of information	Source: http://www.aboutourism.com/

4.2. COMPARISONS BETWEEN COMCEC MEMBER COUNTRIES AND OTHER COUNTRIES

The case studies included in this Study all illustrate good practice. They cover a wide range of types and approaches to tourism product development and marketing. Taken together they illustrate the need for:

- clear vision and guidance from government
- detailed and integrated long range planning, with short term action plans to bring about implementation
- consultation with, and collaboration between, all stakeholders i.e. public authorities, private sector and communities,
- a continuing search for product and market development and diversification opportunities,
- an imaginative approach to tourism product development that recognises and responds to changes and trends in the marketplace, and the emergence of new

markets, segments and niches, BUT which also places a high value on features and attributes that are indigenous and authentic to the destination,
- a highly focussed commitment to sustainable tourism product development that meets the economic/socio-cultural and environmental triple bottom line criteria,
- a flexible and dynamic approach to destination marketing embracing modern technological developments to best demonstrate the attractions of the destination through audio-visual means, and third party endorsement.

The primary lesson from the non-COMCEC country case studies is the importance of a strong government institutional structure for tourism staffed by professionals fully versed in all aspects of tourism development planning and marketing, who are committed to the process of consultation and prepared to act on the consensus views emerging from the process. The preparation of a clear framework to guide future tourism product development is the essential output from the government institution responsible for tourism (see case study 2.3.1).

The non-COMCEC country case studies illustrate how tourism can be developed and managed to avoid the occurrence of the negative aspects of tourism development, and to do so by responding to tourist market trends for tourism development to be sustainable and responsible while providing direct access to the cultural and natural heritage of the destinations they choose (case study 2.3.4).

A further important indicator from the non-COMCEC country case studies is that of collaboration and cooperation:

- between different councils and stakeholders in the case of the Lake District (case study 2.3.2),
- between public and private sector (case study 2.3.3 Alaska cruise), and
- between all stakeholder groups, including local communities (case study 2.3.5 Forodhani Park).

The ability of a country to exploit new market opportunities (case study 2.3.6 Australia Youth) and to re-establish its tourism sector after major disruption (case study 2.3.7 Kenya Recovery) represent good models for other destinations.

The COMCEC country case studies illustrate the full range of types and scales of tourism product development, from small scale community-focussed (case studies 4.1.2, 4.1.4 and 4.1.8) to large scale, integrated, international-style development (case studies 4.1.1 and 4.1.12).

The case studies show very strongly the determination of countries to use tourism for their maximum benefit but not to suffer from over-development or inappropriate development. Principles of sustainable and responsible tourism are central to several case studies (case studies 4.1.5 and 4.1.6).

The well-established destinations are examining and planning for diversification of their tourism sectors both to achieve growth and to spread the benefits more widely within their countries (case studies 4.1.2, 4.1.3 and 4.1.9).

The least developed countries are seeking to develop tourism that is appropriate and based on their natural and cultural resources, looking for opportunities to increase backward linkages (case studies 4.1.4, 4.1.5, and 4.1.8).

The use of technical and other forms of assistance from international agencies is common and can be highly effective (case studies 4.1.5, 4.1.6, 4.1.8 and 4.1.11).

5. CONCLUSIONS AND RECOMMENDATIONS

The principal conclusions arising from the various strands of research and enquiry are drawn together in this final section of the Study, focussing on the lessons to be learnt from the case studies. Recommendations are presented that both apply across all COMCEC countries and address the many challenges and difficulties faced in building up their tourism sectors. Finally, a series of specific recommendations are outlined: first, for COMCEC countries with well-established or rapidly developing tourism sectors; and, secondly, for those COMCEC countries with least developed economies. The final sub-section identifies the possible roles for COMCEC in further assisting its member countries in expanding and improving its provision of tourism products and experiences, and in designing and delivering effective destination marketing strategies.

5.1. Conclusions

5.1.1. Overall Approach to Tourism Product and Marketing Strategy

The planning of tourism development requires incorporation of a wider range of factors than is the case for other economic sectors, including:

- the tourism system of demand, supply and distribution,
- the values (expressed in the form of needs, expectations and levels of tolerance), both of the destination community and of visitors,
- the relationships and inter-linkages between stakeholders in the three interest groups (i.e. government and other authorities; private sector investors, developers and operators; and the local communities in destinations),
- the prevailing planning goals, parameters and regulations,
- the issues of scale (i.e. carrying capacity, thresholds), and
- the requirements for tourism development to meet sustainable development and other non-economic goals.

Products and markets are mirror images of each other. In this regard, the starting point in product development planning typically involves the preparation of a comprehensive assessment of the destination's overall political, economic, socio-cultural, natural, cultural and historical products. In tourism, it can be argued that the role of marketing precedes the development of the product. The marketer gathers information regarding the expectations of the target market (the customers – both domestic and from the various international source regions), and the destination then uses such information to develop appropriate products.

The changing pattern of international tourism, both occurring presently and anticipated in coming decades, has the following main implications for destinations in respect of their tourist product development and marketing strategies:

- A greater volume and range of tourist product types are needed, both to handle the increased numbers of tourists and the changing mix of source countries with differing requirements,

- Product development focussed on the natural and cultural heritage of destinations, reflecting prospective tourists' increasing knowledge about, and demand for direct access to, these features of the destinations they visit, and
- Increased focus on product developments at two extremes: high end attractions and facilities (responding to rising budgets); and local level, community developments and activities (giving interested segments the opportunity to engage with the host population).
- A need to take the environmental and social implications of tourism development into greater consideration, recognising that tourism development can have significant negative impacts if not responsibly managed.

Once the overall priorities and policies for the tourism sector have been established, there are five steps to the process of establishing the best product development opportunities and bringing these successfully and sustainability to the market i.e.

1. establishing the present situation,
2. identifying the opportunities,
3. prioritising the tourism sector's objectives, and
4. supporting the prioritised forms of product development through facilitation and marketing.
5. management and coordination

The establishment of a close working relationship between all levels of government and tourism industry representatives is likely both to be more efficient and illustrate to local communities that proposed new product developments have been well-researched through multi-party dialogue. The process of consultation with all parties can increase understanding and buy in from the population of the location where new developments are proposed.

A layered approach with a central product development planning division and a series of tourism development coordinating committees at the regional level, working together through both a regular forum and ongoing dialogue related to specific projects can be effective. Such a systemic approach can ensure full and appropriate consultation with all stakeholder groups, leading to coordination and collaboration in the development of tourism products that bring out the distinctive character of all parts of a country and spread the socio-economic benefits across its regions.

5.1.2. Lessons From The Case Studies

The case studies featured in this Study (and many other product developments and marketing approaches referenced in the footnotes) illustrate the following sequence in tourism product development and marketing:

Creating Awareness

Without government recognition of the role tourism can play in making a significant contribution to an area's socio-economic development, tourism will not realise its potential, and risks being developed in an unplanned, haphazard fashion. Many of the case studies illustrate how awareness of, and interest in, the product developments were generated by the organisations behind the development as a critically important initial step e.g. the Forodhani Park in Zanzibar 2.3.5.

Stakeholder Support and Collaboration

There are several illustrations in the case studies where the team approach – government, private sector and the host community - has been vital to the effectiveness of the initiative. Many such initiatives arise from dialogue between communities (or non-governmental organisations reflecting community interests and concerns) and national or local administrations e.g. Alaska Cruise Shipping Initiative 2.3.3, ASSET Gambia 4.1.4, Thailand Green Leaf 2.3.4, Malaysia Homestay 4.1.2, Royal Society for the Conservation of Nature, Jordan 4.1.5, Al Shouf Cedar Society, Lebanon 4.1.6.

The two examples of effective cooperation between multiple administrations are the UK's Lake District – 2.3.2 – and the Silk Road – 4.1.11.

Technical Expertise

Insightful and appropriate planning of tourism product development and marketing requires depth knowledge of tourist markets and the tourism distribution system, as well as the socio-economic and environmental impacts of tourism development. This capability at national authority level enables planning to:

- be complete and coordinated e.g. New Zealand 2.3.1
- facilitate the preparation of regional development strategies e.g. Turkey Belek 4.1.1, Maldives 4.1.3
- identify growth development opportunities both in product types (e.g. Tunisia thalassotherapy 4.1.9), and market segments e.g. Australia Youth 2.3.6
- better respond to difficulties in the marketplace e.g. Kenya Recovery 2.3.7.

Regulatory Management

Having a full and balanced understanding of all facets of tourism development and operation also enables administrations to introduce appropriate interventions to ensure sustainable tourism product developments e.g. 2.3.3 Alaska Cruise Shipping Initiative.

Commitment to Implementation

The availability of financial resources to implement product developments and marketing strategies is a fundamental requirement, whether through governmental budgets, aid agency grants, or private sector and community investment. This is clearly illustrated in the major tourism product development initiatives e.g. Turkey Belek 4.1.1, Qatar Aspire 4.1.7, United Arab Emirates Ras Al-Khaimah Real Madrid 4.1.12.

Maintaining the Momentum

It is imperative that progress on long term tourism product development projects remains in line with the planned schedule; and also that the products retain their market appeal. This is especially marked where multiple partners are involved. The preparation of annual action plans as illustrated in the case of the Silk Road project serves as a good example - 4.1.11.

Role of Outside Agencies

Many of the case studies have received technical and financial assistance from outside agencies. The case studies represent good practice though it should be noted that there are also other examples where development agency support has been ineffective for reasons of inadequate government guidance or other factors. Effective examples of outside assistance featured in the case studies are Forodhani Park 2.3.5, Jordan Feynan Eco-lodge – USAID 4.1.5, Shouf Biosphere Reserve, Lebanon – UNESCO 4.1.6, Benin – ITC-UNCTAD 4.1.8, and the Silk Road – UNWTO 4.1.11.

5.2. RECOMMENDATIONS

5.2.1. OVERCOMING THE CHALLENGES

Whatever a country's stage of development or political and socio-economic system, if it embraces tourism as a significant sector for its economic development, tourism product development supported by an appropriate and effective marketing strategy is an integral part of planning for the sector and should not be done in isolation.

Effective tourism product development should be in line both with market trends and tastes (i.e. matching the product to the market), and the requirements, expectations and sensitivities of the destination (i.e. government, private sector and population).

Sustainable tourism development necessitates tourism product development that is:

- original, authentic (reflecting the special attributes of the destination) and differentiated from competitors to the maximum extent possible,
- supported by the people of the destination,
- respectful of the natural and socio-cultural environments with developments not having deleterious impacts, and
- of a sufficient scale to make a meaningful contribution while avoiding high economic leakage

To be fully successful as a tourism destination, the challenges and obstacles that hinder development of its tourism sector need to be addressed by steps to correct or minimise the problems. Three categories of challenges – deficiencies in technical, human and financial resources – were identified in sub-section 3.4.1. Within these umbrella categories a set of 10 specific issues to be rectified were specified i.e.

1. government support,
2. border formalities,

3. human resources,
4. transport access and infrastructure,
5. market control,
6. local society awareness,
7. land,
8. finance,
9. economic leakage, and
10. image and perception

Though these factors apply to all COMCEC countries, they vary in respect of the degree to which they act to slow down tourism development according to the stage of tourism development of individual countries (see Appendix 2).

The recommended actions by which COMCEC countries can seek to reduce this combination of challenges are set out below:-

Institutional Structures

To be effective in planning, managing and marketing the destination, it is necessary to establish institutional structures for tourism that:

- fully recognise tourism's status and priority within the economy,
- ensure coordination with other government departments and agencies with responsibilities that facilitate or impact on tourism, including at regional and local levels,
- include formal (and, where necessary, informal, "open door") links with the private sector, providing a single source for information on policy, strategy, and investment,
- closely link tourism product development and market functions but not always in the same department, instances where they are separate tending to be where the private sector plays a strong part in developing, implementing and, part-financing destination marketing activities,
- set up systems for wide ranging consultation with the triumvirate of stakeholder groups (i.e. public and private sectors and communities) on major issues of tourism development, and
- have a cadre of tourism professionals, educated and trained in tourism planning techniques, marketing methods and, above all, the evolution of international tourism markets and segments. In this way, a destination's national tourism administration can build respect and partnership with the international tourism trade, an important consideration given the control that foreign operators exercise on much of the tourism distribution system.

Turkey (4.1.1), Malaysia (4.1.2), Indonesia and Maldives (4.1.3) are all good examples where such a set up has been established.

The tourism sector should be accorded specific recognition within governmental structures, either as a stand alone ministry or as a department within an appropriate umbrella ministry e.g. economic development, trade, aviation/transport, environment, culture, arts, sports.

The choice of tourism institutional structure should be made taking into consideration the optimal position within government to achieve the essential coordination with other government departments with responsibilities that impact on tourism e.g. transport, education and training, environmental planning.

Planning Systems and Procedures

A tourism development planning system is necessary that comprises a long term vision and perspective, a set of mid term development strategies and planned projects, and a short term implementation plan, with lead and support responsibility identified as in the case of the Silk Road 4.1.11). Plans should be monitored and adjusted as necessary in light of changes in market conditions and other variables. A clear tourism product development investment plan should be prepared and made available to interested investors/developers.

Value chain analysis should be a central element of planning in order that opportunities may be identified both for enterprises directly dealing with tourists and for entrepreneurs and communities supplying goods and services to the tourism operators (via backward linkages, Benin 4.1.8). In this way, imports – economic leakage - for tourism operations can be reduced.

Tourism Product Development & Marketing Strategies

Understanding the types and scales of tourism product development and market opportunities is the first essential step to developing a successful tourism sector. However, there are many other areas for inclusion in a tourism product development plan if it is to realise the full benefits for the destination, as illustrated below:

Market Research and Exchange of Information – market research should be the starting point for all tourism product development and marketing. Destinations need to identify their competitive advantages and pursue differentiated product development and marketing strategies according to their unique selling points and competitive positioning. COMCEC can play a vital role as the clearing house for the exchange between member countries of market information.

> *Market Opportunities* – most COMCEC member countries assess their market potential based on an examination of the trends and requirements of all tourist generating markets. Within the global mix, they select those to target. Their priorities vary. There exists an opportunity where the COMCEC member countries have a competitive advantage which they should seek to take greater advantage of than is currently the case, namely the 1.6 billion worldwide citizens across the wider community of COMCEC countries. This advantage is based on shared values and beliefs, for which the cultural riches in the many World Heritage Sites and other manifestations of cultural heritage in COMCEC countries represent outstanding opportunities.
>
> *Sustainability as the cornerstone* - the rise in all societies around the world of awareness of the need to preserve and protect both the natural environment and the

distinct and distinctive cultures of peoples around the world has led to an increased emphasis on sustainable development.

Sustainability has particular relevance to tourism, being of vital importance both for the destination and the tourist. Tourist activity involves – and in many instances is based on – the natural features and cultural heritage of the destination. Furthermore, it involves the consumer (the tourist) actually going to the place of production (the destination) and seeing (and experiencing) the form and scale of tourism. Feedback is instant on sites like TripAdvisor so any weaknesses cannot be hidden. All forms of tourism product development should, therefore, be based on sustainable principles.

Flagship and Cluster Development – as illustrated the Feynan Eco-lodge development in Jordan (4.1.5) – the creation of a focal attraction or facility can spawn many other tourism and tourism-related products and opportunities for local entrepreneurs and communities. This is a highly effective model for tourism product development. A more complex but effective approach to tourism development in a destination is to identify and create partnerships for a series of attractions and facilities in a geographic area and to feature these as a circuit, trail or touring route (e.g. Lake District 2.3.2).

Events and Festivals - the organisation of themed events and festivals can be a highly effective way of developing tourism in three ways: encouraging business tourism (through trade shows and exhibitions); rectifying seasonal imbalances (through the organisation of a themed festival outside the main tourist season); and changing market image and perception (e.g. through an event targeted at market segments that might not otherwise consider the destination).

Human Resource Development – creation of the necessary supply of local personnel trained in the skills and capabilities to operate and manage tourism attractions and facilities is important for two reasons: it reduces economic leakage from having to employ expatriate staff; and it contributes to the tourist experience by giving direct exposure to staff who are native to the destination. Education and training programmes should be a component of all tourism product development plans.

Quality Standards – similarly, the delivery of tourism products and services need to meet the standards required by visitors. Standards of service need to deliver the three skills of technical knowledge, linguistic capability and social skills. Certification standards are laid down by many destinations in respect of the operation of hotels and other tourist products, and the education and training qualifications of personnel engaged in tourism operations.

Virtually all the COMCEC country case studies have both training and standards improvement elements, in particular Malaysia Homestays 4.1.2, Maldives Gan/Addu Atoll 4.1.3, Gambia ASSET 4.1.4, Benin 4.1.8, Tunisia Thalassotherapy 4.1.9, and Egypt El Gouna 4.1.10. The Forodhani Park, Zanzibar – 2.3.5 – also has a capacity building component starting from creating community awareness through to skills training.

Funding/Investment

Investment planning is a vitally important component of a destination's tourism product development and marketing plan. The achievement of the developments may necessitate selective direct investment/financial support in the form of grant aid or incentives, particularly in undeveloped regions within a country or in countries at the initial stages of tourism development. However, incentives should be geared to specific development goals and subject to time limits rather than being left on the statute book indefinitely.

As a guiding principle, it is better to trim down the ambition of a strategy or plan if finance is not available through government or development agency sources, and investment from the private sector is not forthcoming. If a plan is promulgated, components of which are not achievable from a financial and investment perspective, the whole of the plan may fail to be implemented given the necessity for all elements to be integrated.

Infrastructure

One of the key demands on destination governments is the provision of transport and other infrastructure to facilitate the movement of tourists into, and around, the destination, and to ensure their comfort while staying in the destination. These heavy investments place burdens on least developed countries in particular that hampers the speed and scale of their economic development – both in tourism and other sectors.

Governments should maintain close contact with all potential sources of finance (i.e. development agencies, bilateral programmes etc) and prospective private sector investors identified as prime targets. Through its Project Funding mechanism, COMCEC will finance soft projects serving to the infrastructural needs of the Member States.

Facilitation of Travel

The reduction of barriers to movement between countries is a key goal espoused by UNWTO for several decades. Certain controls and checks are necessary but the adoption of visa on arrival would greatly facilitate international travel, in particular between COMCEC member countries.

Adoption of Modern Marketing Techniques

Unless tourism product development is supported through marketing strategy in the form of marketing, promotional and public relations activities that raise awareness and develop interest in targeted tourist generating markets and segments, it is unlikely to realise the full benefits possible either for the country and local communities, or the individual product investor and operator.

The pursuit of effective marketing strategy can only take place where:

- it has been developed based on the products and experiences offered in the destination (i.e. product: marketing matching),

- it is implemented through a carefully selected range of marketing communications, promotional and public relations tools, with particular emphasis on all forms of electronic marketing including social media networks, and
- it takes full account of changes in market conditions (i.e. the different rates of growth and opportunity in individual source markets, the emergence of new and fast growth segments, and competing destination activities)

To facilitate these processes it is recommended that COMCEC should take a leading role. It should expand its initial steps in facilitating greater information exchange, skills transfer and capacity development between its members, ideally on a sub-regional basis. COMCEC might also further develop its own research capability, to provide detailed investigation into areas of interest to its member countries.

5.2.2. Recommendations: COMCEC Countries with Large and/or Rapidly Growing Tourism Sectors

Established tourism destinations like Turkey and Malaysia represent good models for COMCEC countries that are already embarked on tourism development and are in the development phase of the tourism destination life cycle but have not yet achieved major tourism destination status. They are outstanding examples of planning for the diversification of their tourism products to attract a broader cross section of the travelling public (i.e. domestic and international, discretionary and non-discretionary purposes), to reduce seasonality and to spread the benefits across all sections of the population. Other COMCEC countries with growing tourism sectors can be well-informed by the examples of Turkey and Malaysia within their individual resource limitations and socio-economic development policies.

The challenge for those COMCEC Member Countries with growing tourism sectors is to maintain that growth by staying ahead of the competition. This requires research and investment in tourism products for which they have the resources and attributes to develop, and are compatible with the country's socio-political system.

Product Development & Diversification

As a destination's tourism product and reputation grow, so there is the need to increase the product offering through development in other areas of the country and/or diversification into new product types.

Designation of tourism product development areas or zones - this is an effective means to express the individual strengths and identities within a country. Three examples from the COMCEC region are:

1. Turkey – diversification of tourism product development through winter sports and thermal spa resorts away from the established coastal area and city developments in the country), thereby spreading the socio-economic benefits of tourism around the country.

2. Malaysia – creation of the Homestay product to integrate a wider cross-section of the population in the tourism sector (4.1.2).
3. Maldives – regional diversification through the creation of a new gateway into the country and the creation of opportunities for the population of that area in the country's tourism economy (4.1.3).

New Types of Tourism Product/Experience - the trends and changing tastes of the international tourists reviewed in sub-section 2.2 indicate a raft of product and experience development opportunities that destinations with a track record of tourism operation can seek to exploit.

Those with particular relevance to the 37 COMCEC countries that either have major tourism sectors or are firmly on the growth stage of the tourism area life cycle include: cruise, older generation and youth travel markets, high calibre hotels and shops catering for the luxury traveller, cultural heritage, natural heritage – ecotourism, medical – health and wellness, sports tourism, facilities for pilgrims and other religious-purposes tourists, MICE.

Marketing Strategies

Marketing investment by established tourism destinations is high in recognition of the increasingly intensified tourism destination competition. The full range of marketing communications, promotions and public relations activities are already used. The heavy use of e-marketing, including social media is a growing trend in destination marketing. It is necessary for COMCEC's established and growth destinations to maintain – in some case, increase - its marketing presence, especially when it introduces new types of product/experience which the consumer may not associate with the destination. The marketing budget review process should ensure that the criteria are established and used to measure the return on investment for the individual types of marketing and promotional activity. In light of these measurements, the components of future marketing and promotional campaigns may need adjustment.

In destinations with well-established tourism sectors, the private sector is expected to share the execution of marketing activities in fulfilment of marketing strategy through joint tourism promotion boards or some other form of combined agency or arrangement. This can entail a separation of the tourism product development and marketing strategy roles, with the planning and management of tourism product development fully within government, and marketing linked to, but outside, full government control (e.g. Jordan). Even in such instances, there should be the closest liaison between the dedicated tourism product development function within government and the tourism marketing body.

Electronic technology permits ever increasingly sophisticated study of tourist markets to be carried out. This enables segments and niches to be accurately and narrowly defined, with products and services specifically designed to meet those which are characterised by growth in demand. Corresponding marketing communications messages can be refined to turn this potential into business for the destination.

5.2.3. RECOMMENDATIONS: LEAST DEVELOPED COMCEC COUNTRIES

The special challenge for tourism development in least developed countries (LDCs) is threefold:

1. LDCs are faced with major challenges connected with the health and welfare of their populations. In consequence, tourism is seen by many administrations and societies in these countries as an activity for the affluent to which it is inappropriate to accord high priority,
2. the lack the expertise at government level about tourism markets, the tourism distribution system, and destination competition, and
3. shortage of financial resources to invest in large scale tourism infrastructure development.

The following actions are recommended:

Tourism Awareness Campaigns

In order to increase appreciation that tourism based on the natural and cultural heritage of LDCs can contribute to these countries' socio-economic growth and improved living standards, a two-part awareness programme is proposed.

For senior government officials, a series of study visits can be organised to successful tourism destinations within COMCEC's membership that illustrate the benefits to smaller communities. Such initiatives can be facilitated by the offices of the COMCEC Secretariat.

At the community level, the lack of awareness and understanding of tourism can be addressed through multi-media tourism awareness programmes, including public meetings, workshops, radio and poster campaigns.

Tourism Technical Knowledge

A key challenge for all LDCs, and especially at the local administration level, is acquiring the necessary depth of knowledge and awareness of evolving tourist market trends and how to combat destination competition. It is proposed that a series of education and training activities should be organised to create the necessary tourism technical skills at all levels of a country's administration e.g.

- academic study at established tourism institutes in COMCEC countries like Malaysia and Iran,
- exchanges with other COMCEC member countries, facilitated and coordinated through the COMCEC Secretariat.

Development Funds and Agencies

Attracting outside investment for tourism projects in LDCs, with at best only a limited track record of tourism development, is extremely difficult. The options for LDC governments are:

- its own direct investment in "seed" projects to begin the establishment of a tourism sector and stimulate outside investment,
- obtain development bank funding for significant tourism projects, or
- attract development agency finance.

Islamic funding sources have an increasingly important role to play. That is not to ignore or disparage the technical assistance provided by international agencies and bilateral programmes which will continue to work productively with LDCs in particular. All possibilities and options should be continually monitored by governments.

Tourism Institutions

As noted in sub-section 5.2.1, the tourism sector should be accorded specific recognition within governmental structures, either as a standalone ministry or as a department within an appropriate umbrella ministry e.g. economic development, trade, aviation/transport, environment, culture, arts, sports (the exact combinations used can be seen in Appendix 1). In destinations with well-established tourism sectors, the private sector is expected to share in the execution and funding of marketing activities.

Natural and Cultural Resources

The product development opportunities in LDCs are more limited than in countries that are recognised in the global marketplace as established tourism destinations. In the survey responses undertaken for this report, LDCs within COMCEC have recognised that basing tourism development on their natural and cultural resources is a productive way forward. Such an approach requires extensive involvement of local communities both as the providers of tourism product and experiences, and as suppliers to tourism operators and tourists (through backward linkages). Large scale tourism development is neither appropriate nor realistic for such countries within the next decade or so.

There are many, typically small scale, tourist experiences that are appropriate for local communities to engage in ranging from guiding on nature trails, demonstrations of traditional life skills and handicrafts, cultural performances and training for adventure activities as diverse as white water rafting, rock climbing, desert safaris etc.

Flagship Development

The realisation of the many small scale product and experience opportunities is greatly enhanced if the destination has a magnet to draw tourists in. This can be a natural feature, or a man-made attraction or facility like a hotel. The example of the AKFED TPS Serena Hotels is a particularly effective one, the instance of Tajikistan being noted in case study 4.1.11. The creation of a flagship attraction or facility is a route that other COMCEC LDCs may investigate to their advantage.

Value chain analysis

The examination of all the cogs in the tourism supply chain through value chain analysis – as discussed in sub-section 1.2 - is a recommended means for LDCs to maximise the opportunities for local entrepreneur and community involvement in the tourism sector. It is an effective way of identifying gaps and opportunities in the provision of travel and tourism goods and services, both through direct services for tourists and through backward linkages suppliers to businesses dealing with tourists (e.g. agricultural and fish supplies to the catering trade, construction businesses, makers of handicrafts and other tourist goods to retail outlets).

Human Resource Programmes

While it is important for all countries to ensure they are able to supply the bulk of the personnel required by tourism operations from its own population, the need is most marked in LDCs. The levels of primary, secondary and tertiary education in LDCs are not sufficiently advanced to product the necessary supply of personnel with the requisite technical, linguistic and social skills for a burgeoning tourism sector. The employment of expatriate management and heads of key departments like chefs is common in many LDCs, resulting in economic leakage. Taking advantage of placements on courses in COMCEC countries with established tourism vocational skills training programmes, and setting up similar training programmes in the country, as satellites or under the overall direction of institutions in other COMCEC countries, is necessary.

5.2.4 COMCEC'S ROLE

It is clear from the fact that tourism is one of the six cooperation areas identified in the organisation's overall strategy that COMCEC has a major role in facilitating the development of "a sustainable and competitive tourism sector in the COMCEC region[89]".

The critical area for COMCEC's support for its members' tourism sectors is as coordinator for all areas of cooperation and collaboration between fellow COMCEC member countries. This represents an increasingly valuable way of expanding the role and contribution of tourism in the economies of those COMCEC Member Countries in the initial and development phases of the tourism area life cycle. The shared beliefs and principles of COMCEC country populations has the potential to translate into effective communication between them, and enable countries to better develop appropriate facilities, attractions and activities to cater for the burgeoning tourist demand from fellow Muslims. COMCEC can play a coordinating and clearing house role in marshalling programmes of cooperation, collaboration and assistance for, and between, member countries.

Consistent with the guiding principles of enhancing mobility, strengthening solidarity and improving governance, the following activities are proposed for to be led, facilitated and/or

[89] Making Cooperation Work COMCEC STRATEGY for Building an Interdependent Islamic World. COMCEC Tourism Working Group. April 2013.

coordinated by COMCEC is bringing the recommendations outlined in this report to successful fruition. These are presented according to the output areas identified by the COMCEC Strategy[90].

Regulatory Framework

Simplification and harmonisation of visitor entry requirements in COMCEC countries would benefit the tourism sector and enhance the visitor experience, thereby contributing to the organisation's principle of creating greater mobility into, and between, COMCEC countries.

Capacity Building and Training Programmes

This area is one for extensive involvement by COMCEC as:

- both the provider, and clearing house for the exchange, of market and tourism technical information
- facilitator and coordinator of education and training programmes involving, and between, COMCEC countries
- technical assistance in the form of skills transfer, training and advisory services (e.g. through the provision of training and technical assistance to local SMEs and community tourism product developments through a "start up" and incubation programme)
- funding of "soft" projects through grants provided by the COMCEC Coordination Office

Private Sector Involvement

The totality of COMCEC's programmes of work across all six cooperation areas will serve to raise the profile, and increase the standing, of COMCEC countries as suitable countries to invest in, and do trade with. In respect of tourism, COMCEC's role can be in communicating success stories to the investment and business community both in COMCEC countries and outside. These examples should be drawn both from well-established destinations and those that are achieving strong growth, illustrating the attraction of such destinations to tourists and successful tourism product ventures.

Community-based Tourism Programmes

COMCEC is already highly active in supporting community-based tourism as a means of empowering local communities and increasing their share of the benefits from tourism. It is clear that community-based tourism, taken to the level of "inclusive tourism" (see Benin case study 4.1.8), is a model with considerable future potential in COMCEC's LDC members in particular. Working with governments and through international agencies, as appropriate, COMCEC can assist in facilitating, coordinating and spreading the benefits of this approach to tourism product development.

[90] Making Cooperation Work COMCEC STRATEGY for Building an Interdependent Islamic World. COMCEC Tourism Working Group. April 2013.

Marketing Strategies

In order to achieve its stated output of supporting the “development of effective marketing strategies for raising awareness of the existing tourism destinations of the COMCEC region”, it is proposed that COMCEC should study the possibility of facilitating the design and implementation of joint marketing and promotional campaigns on behalf of the three regional groupings of members. The models of the European Travel Commission and the Caribbean Tourism Organization should be examined as part of this study.

APPENDICES

APPENDIX 1-GOVERNMENT TOURISM MINISTRIES AND OTHER AGENCIES

Country	Government Office Responsible for Tourism	Specialist Agency for Tourism Product Development	Specialist Agency for Destination Marketing
Afghanistan	Ministry of Information, Culture and Tourism	Ministry	Ministry
Albania	Ministry of Tourism, Cultural Affairs, Youth and Sports	Ministry	Ministry
Algeria	Ministry of Tourism and Handicrafts	Algerian National Tourism Office	Algerian National Tourism Office
Azerbaijan	Ministry of Culture and Tourism	Ministry	Ministry & Azerbaijan Convention Bureau
Bahrain	Ministry of Industry and Commerce	Tourism Affairs (within MOIC)	Tourism Affairs (within MOIC)
Bangladesh	Ministry of Civil Aviation and Tourism through the Multi-ministerial National Tourism Council	Bangladesh Tourism Board (NTO)	Bangladesh Tourism Board/ Bangladesh Parjatan Corporation
Benin	Ministry of Culture, Handicrafts and Tourism	Ministry	Ministry
Brunei-Darussalam	Ministry of Industry and Primary Resources	Tourism Department (in MOIPR)	Tourism Department (in MOIPR)
Burkina-Faso	Ministry of Culture, Arts and Tourism	National Tourism Office of Burkina Faso	National Tourism Office of Burkina Faso
Cameroon	Ministry of Tourism and Leisure	Ministry	Ministry
Chad	Ministry of Tourism Development	Ministry	Ministry
Comoros	Ministry of Transport and Tourism	Ministry	Ministry
Cote d'Ivoire	Ministry of Tourism	Ministry	Ministry
Djibouti	Ministry of Youth, Sports, Recreation and Tourism	Ministry	Ministry
Egypt	Ministry of Tourism	Egyptian Tourism Authority	Egyptian Tourism Authority
Gabon	Ministry of Tourism	Ministry	Ministry
Gambia	Ministry of Tourism and Culture	Gambian Tourism Board	Gambian Tourism Board
Guinea	Ministry of Commerce, Industry, Tourism and Handicrafts	Ministry	Ministry
Guinea-Bissau	Ministry of Tourism and Crafts	Directorates of Tourism Activities and Enterprises, and Tourism Fund (under MOTC)	Directorate of Marketing and Promotion (under MOTC)

Guyana	Ministry of Tourism	Guyana Tourism Authority	Guyana Tourism Authority
Indonesia	Ministry of Tourism and Creative Economy	Ministry	Directorate General for Tourism Marketing (under MOTCE)
Iran	Culture, Heritage, Handicrafts and Tourism Organisation	Iran Tourism Development Corporation	Iran Tourism and Touring Organisation
Iraq	Ministry of Tourism and Antiquities	Ministry	Tourist Board of Iraq (under MOTA)
Jordan	Ministry of Tourism and Antiquities	Ministry	Jordan Tourism Board
Kazakhstan	Ministry of Industry and New Technologies	Tourism Industry (under MOINT)	Tourism Industry (under MOINT)
Kuwait	Ministry of Commerce and Industry	Tourism Sector (under MOCI)	Tourism Sector (under MOCI)
Kyrgyzstan	Ministry of Culture, Information and Tourism	Tourism Department (under MOCIT)	Tourism Department (under MOCIT)
Lebanon	Ministry of Tourism	Ministry	Ministry
Libyan Arab Jamahiriya	Ministry of Tourism	Ministry	Ministry
Malaysia	Ministry of Tourism and Culture	Ministry	Malaysia Tourism Promotion Board (under MOTC)
Maldives	Ministry of Tourism, Arts and Culture	Ministry	Maldives Marketing and Public Relations Corporation
Mali	Ministry of Handicraft and Tourism	Ministry	Ministry
Mauritania	Ministry of Trade, Industry, Handicraft and Tourism	Ministry	Ministry
Morocco	Ministry of Tourism	National Tourism Organisation (under MOT)	National Office of the Tunisian Tourism (ONTT)
Mozambique	Ministry of Tourism	Mozambique Tourism Authority	Mozambique Tourism Authority
Niger	Ministry of Tourism and Handicrafts	Niger National Tourism Office (under MOTH)	Niger National Tourism Office (under MOTH)
Nigeria	Ministry of Culture and Tourism and National Orientation	Nigerian Tourism Development Corporation	Nigerian Tourism Development Corporation
Oman	Ministry of Tourism	Ministry	Ministry
Pakistan	Ministry of Foreign Affairs	Pakistan Tourism Development Corporation	Sports and Tourism Wing of MOFA

Palestine	Ministry of Tourism and Antiquities	Ministry	Ministry
Qatar	Ministry of Business and Trade	Qatar Tourism Authority (under MOBT)	Qatar Tourism Authority (under MOBT)
Saudi Arabia	Supreme Commission for Tourism and Antiquities	Supreme Commission	Supreme Commission
Senegal	Ministry of Senegalese Overseas, Handicrafts and Tourism	Directorates for the Study and Planning of Tourism, and Tourism Regulation and Structure (under MOSOHT)	National Tourism Promotion Board (under MOSOHT)
Sierra Leone	Ministry of Tourism and Cultural Affairs	National Tourist Board of Sierra Leone	National Tourist Board of Sierra Leone
Somalia	Ministry of Tourism	Ministry	Ministry
Sudan	Ministry of Tourism, Antiquities and Wildlife	Ministry	Ministry
Suriname	Ministry of Transport, Communications and Tourism	Suriname Tourism Foundation (under MOTCT)	Suriname Tourism Foundation (under MOTCT)
Syrian Arab Republic	Ministry of Tourism	Ministry	Ministry
Tajikistan	Committee of Youth Affairs, Sports and Tourism under the Government of the Republic of Tajikistan	Committee	Tourism Authority of Tajikistan
Togo	Ministry of Culture, Tourism and Leisure	Ministry	Ministry
Tunisia	Ministry of Tourism	National Office of the Tunisian Tourism (under MOT)	National Office of the Tunisian Tourism (under MOT)
Turkey	Ministry of Culture and Tourism	Ministry of Culture and Tourism	Ministry of Culture and Tourism
Turkmenistan	Ministry of Tourism	Ministry	Ministry
Uganda	Ministry Of Tourism, Wildlife and Antiquities	Ministry	Uganda Tourism Board
United Arab Emirates	National Council for Tourism and Antiquities – federal	Dubai Department of Tourism and Commerce Marketing; Abu Dhabi Culture and Tourism Authority	Dubai Department of Tourism and Commerce Marketing; Abu Dhabi Culture and Tourism Authority
Uzbekistan	Ministry of Culture, Sports and Tourism	Ministry	Ministry
Yemen	Ministry of Tourism	Ministry	Yemen Tourism Promotion Board

APPENDIX 2 COMCEC MEMBER COUNTRIES BY REGION AND STAGE OF TOURISM DEVELOPMENT

COMCEC REGIONAL GROUPS

Arab Group (22)
Algeria; Bahrain; Comoros; Djibouti; Egypt; Iraq; Jordan; Kuwait; Lebanon; Libya; Mauritania; Morocco; Oman; Palestine; Qatar; Saudi Arabia; Somalia; Sudan; Syria; Tunisia; United Arab Emirates; Yemen.

Asian Group (16)
Afghanistan; Albania; Azerbaijan; Bangladesh; Brunei; Indonesia; Iran; Kazakhstan; Kyrgyz Republic; Malaysia; Maldives; Pakistan; Tajikistan; Turkey; Turkmenistan; Uzbekistan.

African Group (17)
Benin; Burkina Faso; Cameroon; Chad; Cote d'Ivoire; Gabon; Gambia; Guinea; Guinea-Bissau; Mali; Mozambique; Niger; Nigeria; Senegal; Sierra Leone; Togo; Uganda.

Others (2)
Guyana; Suriname.

COMCEC COUNTRIES ACCORDING TO STAGE OF DEVELOPMENT

Least Developed Countries in the COMCEC Region[91]

Arab Group (6)
Comoros; Djibouti; Mauritania; Somalia; Sudan; Yemen.

Asian Group (2)
Afghanistan; Bangladesh.

African Group (13)
Benin; Burkina Faso; Chad; Gambia; Guinea; Guinea-Bissau; Mali; Mozambique; Niger; Senegal; Sierra Leone; Togo; Uganda.

COMCEC COUNTRIES ACCORDING TO STAGE OF TOURISM DEVELOPMENT

Established destinations with major tourism sectors (11)
Turkey; Malaysia; Saudi Arabia; Egypt; Morocco; the United Arab Emirates; Indonesia; Tunisia; Jordan; Lebanon; Maldives.

Countries where tourism is in the growth stage of the tourism area life cycle (26)
Albania; Algeria; Azerbaijan; Bahrain; Bangladesh; Brunei; Cameroon; Cote d'Ivoire; Gambia; Guyana; Iran; Kazakhstan; Kyrgyz Republic; Kuwait; Mozambique; Nigeria; Oman; Pakistan; Palestine; Qatar; Senegal; Sierra Leone; Suriname; Uganda; Uzbekistan; Yemen.

Countries in the early stages of tourism development (16)
Benin; Burkina Faso; Chad; Comoros; Djibouti; Gabon; Guinea; Guinea-Bissau; Mali; Mauritania; Niger; Somalia; Sudan; Tajikistan; Togo; Turkmenistan.

Countries in the rebuilding phase after conflict (4)
Afghanistan; Iraq; Libya; Syria.

[91] United Nations Economic and Social Council

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