



WTO's Ministerial Conference on Public - Private Partnerships in Tourism Development

Presentation of Mr. José Luis Zoreda
Chief Executive Officer
Exceltur " Spanish Alliance for tourism Excellence "

Bahrein 22nd. September 2003

What is EXCELTUR :



- ☆ *A non profit association of the 30 biggest & leading Spanish tourist companies*
- ☆ *Includes airlines , railways, cruise companies , city and resort hotels TTOO & TTA*
- ☆ *They represent a turnover of 18.000 €*
- ☆ *Over 200.000 Jobs*
- ☆ *Direct Investments in 45 countries and commercial relations with over 175 countries.*
- ☆ *80% of the Spanish Air transport*
- ☆ *Over 50% of the 4& 5 stars Hotel properties*
- ☆ *65% Of distribution*



WHY WAS



INCORPORATED ???

Because even though we will receive over 53 million tourists in 2003, some strong structural changes are happening :

At worldwide level

- Changes in consumer patterns
- Globalization / Desintermediation / Internet
- Impact of Low Cost Carriers in Europe
- Growing emerging competition

At Spanish level

- High dependance from few, markets and operators
- Low product diversification
- Main competitive strategy based on price
- Overall Yield is not growing
- Mature destinations associated to commodities



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrain



VISION OF EXCELTUR

That tourism becomes a national priority

To reposition our industry so tourists perceive in Spain differential experiences

That tourism keeps its multiplying effect as the main driver of the spanish economy

That spanish touristic destinations improve their socio-economic yield .

That Spain keeps its leadership setting up new tourism models and innovative standards

That public –private sectors improve their cooperation and governmental authorities improve their efficiency and competitiveness



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrain



TWO MAIN OBJECTIVES

Improve the Socio-economic perception of Tourism

Raise the levels of competitiveness



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrein



Improve the Socio-economic perception of Tourism

Develop a new monitoring system to analyse the evolution of tourism and measure the economic impact on our national and regional economy.

To stimulate a business culture more sensible and corresponsibile with social , cultural and enviromental issues



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrein



Raise the levels of competitiveness

To estimate a more homogenous and competitive legislation.

To encourage business and destination transformations to make them more sustainable for facing future challenges and opportunities.

To encourage the best market intelligence and benchmarking of products and destinations to facilitate decision making.

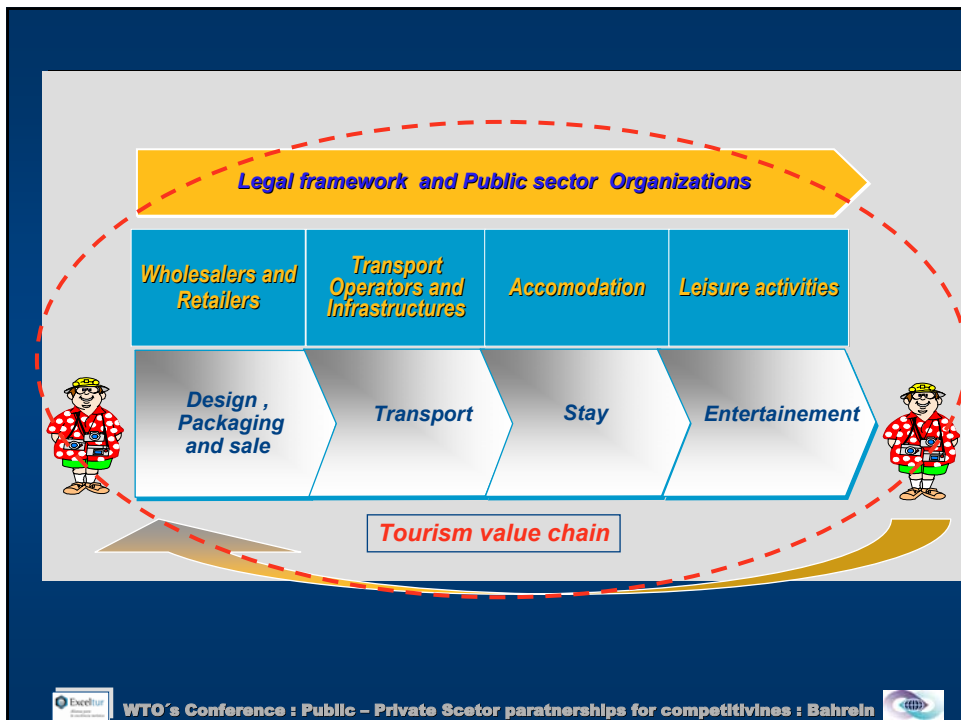
To improve the self esteem of those involved with tourism and attract the best talent to our industry.

To attract the interest and best understanding of our industry among financial institutions .

To extend and consolidate the image and business opportunities of the Spanish tourism industry abroad



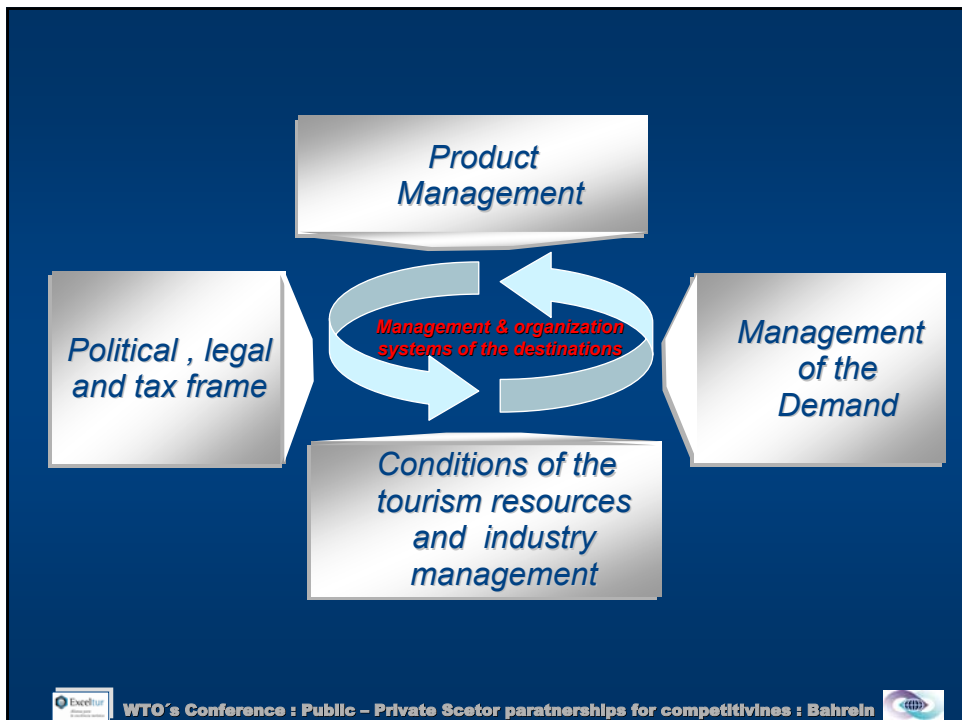
WTO's Conference : Public – Private Sector partnerships for competitiveness : Bahrain



WTO's Conference : Public – Private Sector partnerships for competitiveness : Bahrain



10 Key competitive issues for the Spanish Tourism Industry



10 KEY RECOMENDATIONS OF EXCELTUR TO IMPROVE THE COMPETITIVENESS OF SPANISH TOURISM

1. Only sustainable growth of our hotel and residential plant , in paralell to the appropriate additional local infrastructures ,avoiding over construction as self financing strategy for municipalities
2. Reinforce our quality strategy and undertake pilot projects for a complete repositioning of some mature destinations built on the 60's – early 70's .(RENOVE for SME 's):
3. A new Information and intelligence system for the Spanish Tourism Industry. (SIIT)
4. Change the focus of Marketing and promotion to more targetted market segments , according to new product lines and with a better diversification of distribution channels.
5. Strong institutional support for the consolidations of the most relevant spanish brands abroad.
6. New I +R +D specific Plan for the tourism industry
7. Atract , retain and educate the best talent for the tourism industry .
8. A national agreement among the different spanish autonomic regions in order to have the most homogenius legal conditions and the most coordinated marketing in order not to overlap efforts and confuse the consumer.
9. To establish new public – private sector tourism organizational schemes allowing for a broader vision , a more professionalized management and higher levels of commitment and invovement by the private sector.
10. Recuperate a transversal vision of tourism among the central government establishing at Ministers level a Tourism coordination committe.



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrain



Final consideration :

THE SPANISH TOURISM SECTOR IS UNDOUBTLY A WORLDWIDE LEADER AND AS SUCH OBLIGED TO FOLLOW THE STRATEGY OF THE LEADERS CONTINUOUSLY REINVENTING THEMSELVES AND AMONG OTHERS STRENGTHENING AND REDEFINING THE SCOPE OF PUBLIC – PRIVATE COOPERATION

“The best way to predict our touristic future is to start building it today ”

Thank you for your attention



WTO's Conference : Public – Private Scetor paratnerships for competitivines : Bahrain

