How can emerging destinations make an impact in a crowded marketplace?

STRATEGIES FOR GROWTH
Robert Travers MTS
Some case studies

- ALBANIA
- GEORGIA
- VIETNAM
ALBANIA arrivals 2010-2015
Europe’s last frontier
Spectacular landscapes
Unique history
The crowded marketplace

arrivals (millions): expenditure (USD millions)
Challenges

- Highly seasonal
- Tourism concentrated on the coast
- Most visitors from neighbouring countries/diaspora
- Rural decline
- Poor access
Strategic approach

- UNESCO World Heritage Sites
- New National Museums
- Road access upgrades
Berat
Gjirokaster
Marubi National Museum of Photography
Georgia
Georgia arrivals 2009-2014
Challenges

- Low spend per visitor
- 70% of visitors from 4 neighbouring markets
  - Azerbaijan
  - Armenia
  - Turkey
  - Russia
- Seasonality
Strategic approach

- Improving access to the country
- Incentives for branded hotels
- Diversification
  - Wine tourism (Kakheti)
  - Food tourism
  - Winter tourism
  - Wellness
  - Gaming
Vietnam
Vietnam arrivals 2010-2015
Challenges

- Mass tourism
  - Massive domestic market
  - China
- Limited systems for destination management
- Limited marketing targeting higher spending segments
- Overtourism on some locations
- Environmental pressures
Strategic approach

- Responsible tourism programme (EU funded)
  - Extensive training for Government, industry
  - Establishment of destination management mechanisms in key tourism destinations
  - Establishment of a high level Tourism Advisory Board
  - PPP approach to marketing
**Overall objective**

“To mainstream responsible tourism principles tourism sector to enhance competitiveness and achieving the Socio–Economic Development

**Programme purpose**

“To promote the delivery of environmentally and responsible tourism services as part of Vietnam’s strategy.”

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**Result**

Direct contribution of Vietnam’s Tourism to GDP is 4.3% in 2011 and 6.6% in 2015

28.5% increase of awareness of Vietnam as a responsible tourism destination

(Vietnam’s Lodging Industry Hotel Survey 2014 & 2013 - Grant Thornton Vietnam)
RT POLICY GUIDELINES

Results:
• RT Policy Guidelines developed
• Guidelines endorsed by VNAT, handover to DCSTs/DCSTs/DoT’s of 63 provinces and round table meeting with ITDR for future dissemination.

Impact
• Responsible tourism a key priority in provincial tourism strategies and programmes
• Declaration of Ministry of Tourism to Responsible Tourism (ACMECS Ministerial Declaration on Responsible Tourism Sept.2016)
• Increased awareness with tour operators in promotion/marketing opportunities
Results:

- 66 officers trained in RT Mgt in UK, Holand & RT management course in Malaysia
- RT Management Training for Government Officials Officials from 63 Provinces Provinces (568 pax)
- Hotel management training training programme 4 & 5 & 5 star Vietnamese hotels
- Support Organisation and Personnel dept. VNAT/DCST in tourism management HR database

Impact

86% of beneficiaries have changed their perception, attitude or behaviour as a result of RT management training (Impact survey 2016)

Enhanced capacity in management skills 5/4 Vietnamese hotels
**RT SEMINARS & FAM TRIPS**

Results:
- RT trainings of 6,481 stakeholders from communities, protected areas, heritage sites, accommodation and operators
- RT good practices fam for 128 participants

Impact
- Increased awareness of benefits of responsible tourism in development of sector among Government officials, community and business sector
- Increased awareness with tour operators in promotion / marketing opportunities
6,481 Responsible Tourism Participants

Community 2,153
Accommodation 1,312
Authority 1,197
Protected Areas 206
Craft Villages 238
Travel 200
Cultural Heritage 148
RT Trainer 33
RT Marketing for SMEs 994
Thank you for listening

Robert Travers