



Eighteenth session  
Astana, Kazakhstan, 5 - 8 October 2009  
Provisional agenda item 8

**ROADMAP FOR RECOVERY**  
**TOURISM & TRAVEL: A PRIMARY VEHICLE FOR JOB CREATION**  
**AND ECONOMIC RECOVERY**

(Report of the Secretary General on Sustainable Tourism in Challenging Times)

**Note by the Secretary-General**

Under this item of the provisional agenda, the Secretary-General presents to the General Assembly a document on sustainable tourism in challenging times focusing on the impact of the current global economic crisis on tourism and the actions undertaken by the Organization in this regard, namely the *Roadmap for Recovery*.

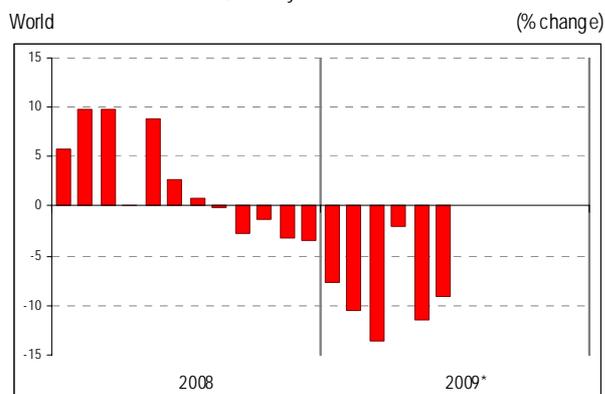
**ROADMAP FOR RECOVERY**  
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## 1. The Impact of the Global Economic Crisis on Tourism

The global economy is undergoing its most severe recession of the post second world war period with damaging consequences for millions of people, businesses and jobs worldwide. Advanced economies have been struggling with recession, and even the emerging economies, which at the beginning seemed to resist better, rapidly had to face the impact of the economic crisis. The latest economic prospects indicate that the world economy may have bottomed out and may be starting to emerge from this unprecedented recession. But experts warn that recovery might be sluggish. Furthermore, unemployment, which rose fast, will take longer to rebound. . The International Labour Organization (ILO) estimates that global unemployment could increase by an additional 29 million (lowest scenario) to 59 million (highest scenario) unemployed people in 2009 versus 2007.

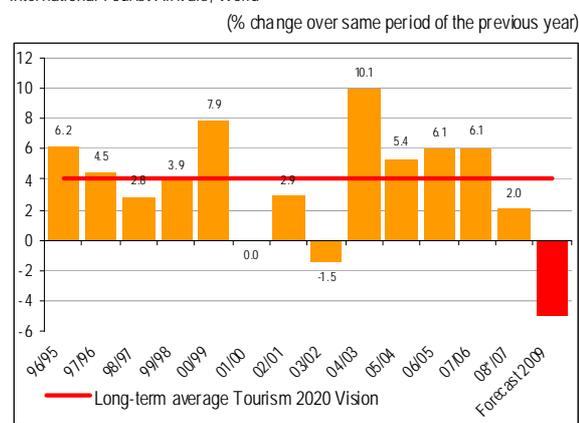
Tourism, though resisting better than other sectors has not been immune to the deteriorating economic situation. After a very sound start, with worldwide growth in international arrivals averaging nearly 6% in the first six months of 2008, demand fell harshly – by 1% between July and December 2008. As expected, this trend has intensified in 2009 – international tourist arrivals fell by an estimated 8/9% during the first six months of this year (an updated estimate will be presented at the General Assembly).

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World



Source: World Tourism Organization (UNWTO) ©

With the exception of Africa, all regions recorded declines in arrivals. Europe and the Middle East have been particularly affected. In many destinations, the performance of the domestic market, though better than that of the inbound markets, has not been sufficient to compensate for the falling international demand. These results reflect the severe impact of the economic crisis that hit advanced economies, i.e. the major tourism source markets, strongly and rapidly spread to emerging markets, which in recent years have been one of the main drivers of global economic and tourism growth.

The economic conditions, combined with the additional uncertainties brought about by the influenza A(H1N1) outbreak last April, are expected to continue impacting tourism demand – at least in the short term. Though decline rates are expected to ease during the remainder of 2009, international tourism is forecast to decrease by between -6% and -4% this year – and if so, this would be the worst result in decades. Growth is projected to be negative in all regions, except in Africa. Domestic markets, highly stimulated by many governments during the crisis, are expected to do slightly better. As in previous crises, tourism earnings are expected to suffer more than arrivals as consumers tend to trade down, stay closer to home and for shorter periods of time. All around the globe, companies, and particularly small and medium enterprises (SMEs), which make up the bulk of the tourism sector, face increasing difficulties as demand declines and access to credit became harder.

## 2. UNWTO Response

As the crisis emerged, UNWTO developed a programme to provide the sector, and Members in particular, with the necessary support to help them better navigate through these hard times. In October 2008, a Tourism Resilience Committee (TRC) was established, under the Chairmanship of the Minister of Tourism of Egypt, HE Mr. Zoheir Garranah, to bring together all UNWTO members and key industry stakeholders.

The Committee aims to provide closer market monitoring, a platform for sharing experiences on crisis impact and response, support for public/private partnerships and coherence between short term and long term action. Moreover, one of the Committee's main aim was to provide guidance in terms of how could the sector overcome the current crisis.

The TRC has met twice to date (in January and March 2009) and will meet again during the Assembly.

Under the guidance of the Committee, the following activities were undertaken (Annex 1 – Report on the Activities of the Tourism Resilience Committee, 2009):

- Interim Updates of the UNWTO World Tourism Barometer to complement regular market monitoring: The *UNWTO World Tourism Barometer* is UNWTO's short term market monitoring report. It is published three times a year (January, June and October). To provide a more update insight into the market situation the Secretariat has prepared during 2009 two Interim Updates of the *UNWTO World Tourism Barometer* (in April and early October);
- Online crisis information platform: As the crisis emerged, UNWTO created an online resource in its website ([www.unwto.org/trc](http://www.unwto.org/trc)) to provide market intelligence, information on the crisis activities and initiatives being implemented by the Secretariat as well as on the crisis response measures implemented by individual countries.

- Online market intelligence platform: UNWTO has been developing a business intelligence solution which will allow UNWTO Members (in an exclusive basis) to access monthly information on key indicators covering destinations as well as sources markets (a presentation of this new platform – the *UNWTO World Tourism Barometer* online – will be done during the 3<sup>rd</sup> Meeting of the Tourism Resilience Committee to be held on the 8<sup>th</sup> October in the framework of the General Assembly)
- Collaboration with stakeholders such as Amadeus, Visa International and Booz & Company to provide new indicators and market intelligence on the impact of the crisis on tourism demand. This includes data on air transport effective and forecast bookings, analysis of the impact of the crisis on the air transport and travel expenditure.
- Database on national stimulus measures for the tourism sector: It includes information covering over 60 countries which have implemented measures in the following areas Fiscal, Monetary, Human Resources, Marketing, Travel Facilitation, Public/private partnerships, Regional Cooperation and Environment<sup>1</sup> (Annex 2 – Stimulus Measures for Tourism Recovery by Country).
- Advocacy of Tourism as a key driver of job creation and economic recovery: In this respect, a message stressing the potential for tourism to support short term stimulus actions as well as the longer term transformation to a green economy, coherent with development and climate imperatives was promoted on the occasion of the G20 meeting in April 2009 ([www.unwto.org/G20.php?lang=E](http://www.unwto.org/G20.php?lang=E)).

In addition, the TRC established a Core Working Group, under the Chairmanship of HE the Australian Ambassador to Spain, Mr. Noel Campbell, to guide the development of a *Roadmap for Recovery*.

At ITB Berlin in March 2009, UNWTO announced a *Roadmap for Recovery*, to be finalized by UNWTO's General Assembly, based on seven action points:

1. Be realistic
2. Embrace change in markets, demand and operating dynamics
3. Harness the power of technology
4. Boost Public/Private Partnership
5. Remind the world that tourism means Jobs, Infrastructure, Trade and Development
6. Help the poorest grow tourism, fight climate change & advance development
7. Put Tourism and Travel at the core of Stimulus Packages & the Green New Deal

Based on the above, and after an intensive work programme, lead by the Core Working Group of the Tourism Resilience Committee, a *Roadmap for Recovery* has been developed.

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<sup>1</sup> The database is available at [www.unwto.org/trc](http://www.unwto.org/trc) and it is updated on a weekly basis.

The *Roadmap* includes a set of 15 recommendations based on three interlocking action areas: **Resilience – Stimulus – Green Economy** – aimed at supporting the tourism sector and the global economy.

### **I. RESILIENCE**

1. Focus on Job Retention and Sector Support
2. Understand the Market and Respond Rapidly
  3. Boost Partnerships and 'Coopetition'
  4. Advance Innovation and Technology
5. Strengthen Regional and Interregional Support

### **II. STIMULUS**

6. Create New Jobs – particularly in Small and Medium Enterprises (SME's)
7. Mainstream *Tourism* in Stimulus and Infrastructure Programs
  8. Review Tax and Visa Barriers to Growth
9. Improve *Tourism* Promotion and Capitalize on Major Events
10. Include *Tourism* in Aid for Trade & Development Support

### **III. GREEN ECONOMY**

11. Develop Green Jobs and Skills Training
12. Respond Effectively to Climate Change
13. Profile *Tourism* in all Green Economy Strategies
14. Encourage Green *Tourism* Infrastructure Investment
15. Promote a Green *Tourism* Culture in Suppliers, Consumers and Communities

The *Roadmap* aims to show the contribution tourism can make to the ongoing global efforts to tackle the economic crisis through the creation of jobs and the promotion of trade flows. It positions *Tourism* as a primary vehicle for job creation and economic recovery and makes the following points:

- ***Tourism is one of the world's top job creators***
- ***Tourism is a lead export sector***
- ***Tourism is a key development agent.***
- ***Tourism can help the transition to a Green Economy***

### 3. The Way Forward - Advancing the *Roadmap*

In advancing the *Roadmap* UNWTO will work closely with its Member States to undertake a series of initiatives designed to help strengthen support for tourism as a key contributor to economic recovery, sustainable development **and, above all, job creation.** The main goal is to promote the *Roadmap* to key decision makers at national, regional and global levels.

National actions will focus on ministries of economy, communication, environment, employment, finance, trade and investment as well as local governments, financial institutions, development agencies, parliaments and key media.

Regional and global actions will be addressed to major players such as the African Union (AU), the Arab League, Mercosur, the European Union (EU), the Association of Southeast Asian Nations (ASEAN), the North American Union (NAU) and the Asia-Pacific Economic Cooperation (APEC), the Organisation for Economic Co-operation and Development (OECD) as well as the G8+G5, the BRICs, the G77, and the G20<sup>2</sup>. Attention will also be given to the UN system and the International Financial Institutions.

History shows that the biggest challenges provide the biggest opportunities. Today world leaders are working together in ways that would have been unimaginable at any time in the past, to coordinate and collaborate on their economies, their climate response and their development agenda.

The current crisis brings several opportunities for the tourism sector:

- to reinforce tourism resilience and economic importance through stronger investment in human resources, in better market knowledge and in technology and innovation;
- to maximize the value of tourism in developing countries where the sector is for many one of the major sources of employment and foreign earnings;
- to rethink the existing growth models and embrace the principles of sustainable development and the transformation to the Green Economy;
- to increase cooperation between all stakeholder as well as regional and sub-regional cooperation.

UNWTO, as the leading organization in the field of tourism, will promote this *Roadmap* and invite all leading decision makers from the public and the private sectors and industry organizations to join and help chart the way forward.

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<sup>2</sup> As an initial example, the Minister of Tourism of South Africa has proposed to lead a UNWTO members' initiative to strengthen the positioning of tourism as a primary vehicle for job creation and economic recovery in the agenda of the G20.

The unpredictable and global nature of the current economic downturn, coupled with the long term challenges of climate change and poverty alleviation, will have a significant, though still not totally clear, impact on consumers and markets. New operating patterns may emerge and changes in markets will surely occur.

Over the last few decades, our industry has experienced various setbacks, faced severe natural and man-made crises and through it all, has demonstrated a remarkable resilience, coming out stronger and healthier than before. In fact, the actual pace of growth has been slightly higher than UNWTO's *Tourism 2020 Vision* forecast. International tourist arrivals showed an average annual growth of 4.3% between 1995 and 2008, compared with the projected 4.1%<sup>3</sup>.

Long term prospects remain positive if the sector is able to address its challenges in a coordinated and effective manner. Demand will continue to be strong based on the continuous expansion of emerging countries – as destinations and as source markets – as well as from growing public and private investment in the sector, and more important, from the fact that travel both for business and leisure purposes has become an integral part of consumers' lifestyle and companies' operations in today's globalized world.

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<sup>3</sup> As part of its program of work, UNWTO is currently undertaking a major update of its long-term outlook with the project *Tourism Towards 2030*.

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## *Roadmap for Recovery*

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# Tourism & Travel

*A Primary Vehicle for  
Job Creation & Economic Recovery*

## ***Roadmap for Recovery***

The *Roadmap for Recovery* is addressed to world leaders and decision makers as they seek to stimulate the global economy, support developing countries and accelerate the transition to a Green Economy.

It aims to show how the *Tourism* sector can contribute to the ongoing actions to respond to the crisis by creating jobs, promoting trade and enhancing development.

The *Roadmap for Recovery* is a set of strategic guidelines based on three interlocking action areas: Resilience – Stimulus – Green Economy – to support the global economy and the Tourism sector.

This document was formulated by UNWTO, who seeks collaborative engagement for its assessment and implementation.

## ***Why Tourism & Travel<sup>4</sup>?***

***Tourism is ...***

### **One of the World's Top Job Creators.**

- Provides more than 75 million direct jobs worldwide<sup>5</sup>.
- Offers fast entry into the workforce, particularly for youth and women in urban and rural communities.

### **A Lead Export Sector, particularly for Developing Countries.**

- 30% of the world's exports of services (1 trillion US\$ a year)<sup>3</sup>.
- Up to 45% of the total export of services in developing countries<sup>3</sup>.

### **A Key for Stimulus and the Transformation to a Green Economy.**

- Contributes directly and through its multiplier effect to global job creation and economic recovery.
- Accounting for a comparatively low share, 5% of CO<sub>2</sub> emissions<sup>3</sup>, *Tourism* is well-positioned and committed to progressively reducing its carbon emissions and contributing to the transformation towards a Green Economy.

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<sup>4</sup> Tourism & Travel' refers to a wide range of domestic and international tourism business and activities which incorporates transportation, accommodation and related services. Hereafter, the term '*Tourism*' will be used.

<sup>5</sup> World Travel and Tourism Council (WTTC): In 2009, Tourism & Travel is estimated to generate 77 million direct industry jobs (2.7% of total employment) and around 220 million direct and indirect jobs (7.6% of total employment).

<sup>3</sup> World Tourism Organization (UNWTO), [www.unwto.org](http://www.unwto.org). As compared to other sectors such as land use and forestry (24%) or manufacturing and construction (13%).

## ***Summary of Recommendations***

### **I. RESILIENCE**

- 16. Focus on Job Retention and Sector Support
- 17. Understand the Market and Respond Rapidly
  - 18. Boost Partnerships and 'Coopetition'
  - 19. Advance Innovation and Technology
- 20. Strengthen Regional and Interregional Support

### **II. STIMULUS**

- 21. Create New Jobs – particularly in Small and Medium Enterprises (SME's)
- 22. Mainstream *Tourism* in Stimulus and Infrastructure Programs
  - 23. Review Tax and Visa Barriers to Growth
- 24. Improve *Tourism* Promotion and Capitalize on Major Events
- 25. Include *Tourism* in Aid for Trade & Development Support

### **III. GREEN ECONOMY**

- 26. Develop Green Jobs and Skills Training
- 27. Respond Effectively to Climate Change
- 28. Profile *Tourism* in all Green Economy Strategies
- 29. Encourage Green *Tourism* Infrastructure Investment
- 30. Promote a Green *Tourism* Culture in Suppliers, Consumers and Communities

## ***Recommendations***

### ***I. Resilience***

#### **1. Focus on Job Retention and Sector Support**

*Tourism* is an economic activity that provides jobs for millions in the sector and in many interlocking industries. Well-trained staff has the skills to move across the workforce. Globally, *Tourism* grows faster than GDP, doubling the jobs created every 10 to 15 years. During the recession it is important for governments and industry to undertake actions to retain the core workforce and maintain training standards. Relevant strategies should recognize the special needs of SME's, particularly in less developed countries.

#### **2. Understand the Market and Respond Rapidly**

Close monitoring and analysis of changing trends and early reaction will help the sector to maintain its competitiveness. It will require increased collaboration, research and information exchange between public and private sectors, international organizations and educational institutions as well as the development of new tools and data analysis. Building networks for tourism knowledge at national, regional and international level should be encouraged. The UNWTO and other organizations should enhance network links and support systems.

#### **3. Boost Partnerships and 'Coopetition'**

Public and private sector partnerships should be strengthened wherever possible to help preserve and create jobs, streamline procedures, simplify regulations and increase productivity. This can extend beyond traditional *Tourism* frameworks into economic, employment and development areas and maximize synergies between national, regional and international stakeholders. In the transformation to a Green Economy and the reduction of barriers to growth, competitors will often have common goals.

#### **4. Advance Innovation and Technology**

Innovation can play a leading role in assisting *Tourism* to adapt to new sustained economic conditions. Areas which could be considered for review and action include border systems, e-visas, air and ground traffic handling, congestion management as well as waste reduction and energy efficiency technologies. Adopting innovative practices and increasing the uptake of technology by all stakeholders should be encouraged. Particular consideration could be given to providing financial support and capacity building for developing countries and SMEs, so that they can benefit from affordable advances in technology and leapfrog development.

### **5. Strengthen Regional and Interregional Support**

There is a special value to geographic linkage. In downturns demand tends to shift closer to home so domestic incentives, which are then regionalised, allow the spread of costs. The same applies to promotion inside and outside the region. The feasibility of regional approaches to visa elimination, transport liberalization, tax moderation and reduce air traffic congestion, are cases in point.

## ***II. Stimulus***

### **6. Create New Jobs – particularly in SME's**

Providing credit lines (including micro credit), special finance plans, loans and skills training, either by sector specific mechanisms or by prioritising *Tourism* in general programs, is of crucial importance for the economic viability of tourism enterprises, particularly for SME's, and for the creation of new jobs. Consideration can be given to specific educational programs and vocational training for the tourism industry with a strong emphasis on ICT, green products/services and quality support activities.

### **7. Mainstream *Tourism* in Stimulus and Infrastructure Programs**

*Tourism* should be of major consideration in stimulus programs – areas such as tax reduction, export promotion, job support or retraining can also benefit the industry. *Tourism* can gain greatly from investment in infrastructure because of its direct effect on jobs in construction and related sectors. High speed trains, port and airport facilities, stations and major highways fall into this category – as does the environmentally sustainable renovation and climate proofing of hotels, attractions and other tourism facilities.

### **8. Review Tax and Visa Barriers to Growth**

Travel taxes should be scrutinized objectively for excessive burdens on travellers/companies. Governments may consider temporary reductions where permanent ones are difficult to achieve. Exemption from visa fees, elimination/simplification of visa requirements and electronic visas, could be considered wherever feasible. Consideration can also be given to the benefits of intraregional collaboration on travel facilitation.

### **9. Improve *Tourism* Promotion and Capitalize on Major Events**

Diversified *Tourism* strategies should avoid dependence on any one activity or market. Foreign visitors are high value exports and must be considered as part of national export promotion action. Marketing programs should address underlying demand shifts for better value/deals as well as competitive realities. Embracing the shift in consumer preferences towards internet and multimedia delivery is fundamental. Partnerships and regional cooperation should be explored to enhance *Tourism* promotion. The benefits offered by the involvement in major events, especially sports, should be explored.

### **10. Include *Tourism* in Aid for Trade and Development Support**

*Tourism* stakeholders should work with aid agencies to support the emerging Aid for Trade Provisions of the Doha Development Round, the specific developing country assistance for the least developed countries within the G20 and similar initiatives and the potential clean development/carbon adaptation funds from the UNFCCC<sup>4</sup> climate negotiations. Development assistance for *Tourism* could be used for capacity building, technology transfer, and green infrastructure/jobs.

## ***III. Green Economy***

### **11. Develop Green Jobs and Skills Training**

As the world shifts to a progressive carbon reduction regime – a fundamental target of the Green Economy – *Tourism* can be a lead change agent to encourage and provide employment in sustainable activities. The key will be to identify Green programs and new associated jobs, as well as to provide the appropriate training. Particular consideration should be given to how this goal can be extended to developing countries in an affordable and viable way. Vocational training, ‘voluntourism’ and alignment with overall tourism green training programs are also important.

### **12. Respond Effectively to Climate Change**

The tourism community should continue to champion carbon neutrality and confront commitments agreed by parties to the UNFCCC to respond to climate change. This should include incentives for adaptation, substantial financial support and low cost technology transfer for the poorest economies. All strategies and the associated financing should help drive sectoral low carbon transport and accommodation, as well as the use of green technology.

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<sup>4</sup> United Nations Framework Convention on Climate Change.

**13. Profile *Tourism* in all Green Economy Strategies**

*Tourism* should be integrated into national, regional and international legislation/regulations that encompass and encourage Green Economy strategies. *It* should also be profiled high in Green employment strategies. Green investment, planning, procurement, fuel efficiency, renewable energy programs must also cover *Tourism*.

**14. Encourage Green *Tourism* Infrastructure Investment**

Transport and buildings are primary green policy and investment targets. Transport infrastructure – e.g. expressways, high speed trains, airports, ports and air traffic management systems – is mostly geared to *Tourism* needs without explicit recognition. The linkages should be made explicit. Climate proofing and sustainable design is often targeted at government buildings but could and should apply equally to hotels, attractions and other tourism facilities.

**15. Promote a Green *Tourism* Culture in Suppliers, Consumers and Communities**

Given the massive impact of consumption in modern society, the ultimate challenge will be to increase public awareness on sustainable *Tourism* and stimulate the transformation towards the production and consumption patterns of a Green Economy. Adjustments in public expectations and a widespread industry participation in credible environmental certification programs are both necessary. *Tourism* must not only be in the change leadership of products/services, but be a beacon for that change through its intensive communications activities. This can be built into internal and external messaging.



## **A N N E X 1**

### **Report on the Activities of the UNWTO Tourism Resilience Committee (2009)**

#### *1. Background*

In October 2008, the UNWTO Executive Council confirmed that despite its long-term confidence in the resilience of tourism, the economic downturn was having a major impact on tourism demand. Recognizing that many challenges lay ahead in 2009, when the economic slowdown was expected to be more widely felt and consumers were expected to further cut back on their travel expenditures, the Council agreed in its 84<sup>th</sup> Session:

- to create a Resilience Committee open to all of its public and private sector Members;
- to support this work with state-of-the-art information, with special focus on air transport and major origin markets;
- to provide UNWTO Members with ICT-based up-to-date information on these impacts and emerging response initiatives.

#### *2. Objectives*

The main objective of the Tourism Resilience Committee is to support UNWTO Members to better endure the challenges posed by the current economic slowdown via:

- close market monitoring of the impact of the current economic slowdown on the tourism sector;
- sharing experiences on the measures and tools being used by public and private sectors to stimulate tourism demand;
- the reinforcement of public/private partnerships, which are crucial in times of crisis;
- not losing sight of the longer-term challenges posed by climate change and sustainable development.

#### *3. Constitution*

3.1 The Committee is open to the participation of all UNWTO Members.

3.2 UNWTO invites other organizations that are considered key players in the sector (such as the European Commission, the International Air Transport Association (IATA), the International Civil Aviation Organization (ICAO) and the World Travel and Tourism Council (WTTC)) to take part in the Committee meetings.

#### *4. Functioning*

4.1 The Committee meets in its full constituency.

4.2 The Committee has a Core Group with the following responsibilities:

- Give guidance to the work of the Committee;
- Contribute to the documents/reports to be prepared for the full meetings of the Committee.

#### 4.3 The Committee's Core Group is constituted by the following members:

UNWTO full Members	Australia, Brazil, China, Egypt, Ethiopia, Greece, Italy, Jordan, Mexico, Morocco, Pakistan and South Africa.
UNWTO Affiliate Members	Accor, Amadeus, AMFORT, Brazilian Confederation of Convention and Visitors Bureaux, Iberia, Federal Association of the German Tourism Industry (BTW) and Visa
Invited global or regional stakeholders (of which some are UNWTO Affiliate Members)	European Commission (EC), Arab Tourism Organization, Caribbean Tourism Organization (CTO), International Congress & Conventions Association (ICCA), International Federation of Tour Operators (IFTO), International Hotel and Restaurants Association (IH&RA), Japan Association of Travel Agents (JATA), Pacific Asia Travel Association (PATA), Travel Industry Association of America (TIA), the International Air Transport Association (IATA), the International Civil Aviation Organization (ICAO) and the World Travel and Tourism Council (WTTC).

Note: Both the meetings of the Tourism Resilience Committee as well as the participation in the Core Group meetings are open to all Members who wish to take part (contact [trc@unwto.org](mailto:trc@unwto.org)).

#### 5. Tourism Resilience Committee Meetings

The Committee has met on two occasions up to date.

- The 1<sup>st</sup> Meeting of the Tourism Resilience Committee was held on the 28<sup>th</sup> of January 2009 in Madrid (Spain) during FITUR. The first meeting aimed at reviewing the impact of the unfolding crisis on tourism and the measures being implemented at national level to overcome the crisis. (The full report of the 1<sup>st</sup> Meeting of the Tourism Resilience Committee is available at [www.unwto.org/trc/meetings/meetings.php?lang=E](http://www.unwto.org/trc/meetings/meetings.php?lang=E)).
- The 2<sup>nd</sup> Meeting of the Tourism Resilience Committee was held on the 13<sup>th</sup> of March 2009 in Berlin (Germany) during ITB. On this occasion, participants shared updated market information on the impact of the global economic crisis on tourism, as well as examples of stimulus packages aimed at the tourism sector developed by the public (Thailand, China, Bahamas and Maldives) and private sectors (Federal Association of the German Tourism Industry – BTW). A major focus of the 2<sup>nd</sup> Meeting of the TRC was the presentation of a draft *Roadmap for Recovery*. The Committee concluded that the role tourism can play in stimulating economic growth and recovery has not yet been fully recognized and that if the sector works together closely, tourism can be one of the first drivers of economic recovery.

The Committee agreed that these points should be reflected in the *Roadmap*. The Committee also called all governments to join and promote the *Roadmap for Recovery*. (The full report of the 2<sup>nd</sup> Meeting of the Tourism Resilience Committee available at [www.unwto.org/trc/meetings/meetings.php?lang=E](http://www.unwto.org/trc/meetings/meetings.php?lang=E)).

After the announcement and debate on the *Roadmap for Recovery* at ITB Berlin, an intensive work programme has been carried out by the Tourism Resilience Committee. In this framework, the Core Group of the TRC met in Madrid on the 21st of May 2009 to review and guide the final document of the *Roadmap for Recovery*, scheduled to be officially presented at the UNWTO General Assembly in Kazakhstan (2-9 October 2009).

- A 3<sup>rd</sup> Meeting of the Tourism Resilience Committee will be held on the 8th of October 2009 in Astana, Kazakhstan (on the occasion of UNWTO's General Assembly). The meeting aims at reviewing the work of the Tourism Resilience Committee to date and setting guidelines for its future activities, focusing particularly on the dissemination and promotion of the Roadmap for Recovery.

## 6. Activities

Under the guidance of the Tourism Resilience Committee, the following activities have been undertaken:

- Interim Updates of the UNWTO World Tourism Barometer to complement regular market monitoring: The *UNWTO World Tourism Barometer* is UNWTO's short term market monitoring report. It is published three times a year (January, June and October). To provide a more updated insight into the market situation, the Secretariat prepared two Interim Updates of the *UNWTO World Tourism Barometer* in 2009 (in April and early October);
- Online crisis information platform: As the crisis emerged, UNWTO created an online resource in its website ([www.unwto.org/trc](http://www.unwto.org/trc)) to provide updated market intelligence, information on the crisis activities and initiatives being implemented by the Organization, as well as comprehensive information on crisis response measures implemented by individual countries;
- Online market intelligence platform: UNWTO has been developing a business intelligence solution which will allow UNWTO Members (on an exclusive basis) to access monthly information on key indicators covering destinations as well as sources markets (this new platform – the *UNWTO World Tourism Barometer* online – will be presented to Members during the 3<sup>rd</sup> Meeting of the Tourism Resilience Committee);
- Collaboration with stakeholders such as Amadeus, Visa International and Booz & Company to provide new indicators and market intelligence on the impact of the crisis on tourism demand. This includes data on air transport effective and forecast bookings, analysis of the impact of the crisis on the air transport and travel expenditure (information available at [www.unwto.org/trc/meetings/meetings.php?lang=E](http://www.unwto.org/trc/meetings/meetings.php?lang=E)).

- Database on national stimulus measures for the tourism sector: This online database includes information on over 60 countries which have implemented tourism stimulus measures in the following areas: fiscal, monetary, employment and human resources, marketing, travel facilitation, public/private partnerships, regional cooperation and environment. The database is available online ([www.unwto.org/trc](http://www.unwto.org/trc)) and is updated on a weekly basis. UNWTO has also produced a report on *Tourism and Economic Stimulus*. The report is also available online ([www.unwto.org/trc](http://www.unwto.org/trc)) and is updated on a monthly basis. (For detailed information on stimulus measures by country see Annex 2 – Stimulus Measures for Tourism Recovery by Country);
- The Roadmap for Recovery: After an intensive work programme, lead by the Core Working Group of the Tourism Resilience Committee under the Chairmanship of HE the Australian Ambassador to Spain, Mr. Noel Campbell, a *Roadmap for Recovery* has been developed as a key output of the work of the Tourism Resilience Committee. The *Roadmap*, which will be officially presented at the General Assembly, sets out 15 recommendations based on three interlocking action areas: **Resilience – Stimulus – Green Economy** – aimed at supporting the tourism sector and the global economy.
- Advocacy of Tourism as a key driver of job creation and economic recovery: In this respect, a message stressing the potential for tourism to support short-term stimulus actions as well as the longer term transformation to a Green Economy, coherent with development and climate imperatives was promoted on the occasion of the G20 meeting in April 2009 (see [www.unwto.org/G20.php?lang=E](http://www.unwto.org/G20.php?lang=E)). Initiatives of this kind will continue to be developed with the aim of advocating tourism's role as a key driver of job creation and economic recovery and the promotion of *Roadmap for Recovery*.

## A N N E X 2

### Stimulus Measures for Tourism Recovery by Country<sup>7</sup>

#### 1. About this document

The current document aims to provide a summary of the response measures developed by countries around the world to mitigate the impact of the global economic crisis on tourism.

The report is part of the activities of the UNWTO Tourism Resilience Committee and includes information on over 70 countries worldwide. The information has been collected through questionnaires, sent to all UNWTO Member States by the UNWTO Secretariat during the months of March, April and August 2009, as well as through continuous research of online sources.

More detailed information on stimulus measures by country is available in UNWTO's dedicated crisis webpage ([www.unwto.org/trc](http://www.unwto.org/trc)). This information is updated on a regular basis. Countries which are not featured in this assessment or in UNWTO webpage on 'Response Actions' are kindly invited to send the corresponding information to the Secretariat ([trc@unwto.org](mailto:trc@unwto.org)).

#### 2. Crisis Measures

The measures, for which information is available, have been classified into eight broad categories.

1. Fiscal measures
2. Monetary measures
3. Human resources/employment measures
4. Marketing measures
5. Travel facilitation
6. Public/private partnerships (PPPs)
7. Regional cooperation
8. Environmental measures

As it is clear from the Table 1 below, most countries have implemented measures in the areas of marketing, and most specifically aiming at the domestic market, and public/private partnerships, as these are the areas where national tourism administrations/organizations have a direct and immediate mandate and can act more rapidly. It also shows that especially in times of crisis, the cooperation and synergy between public authorities and the private sector is highly valuable.

A significant number of countries have also developed measures of fiscal and/or monetary nature recognizing the necessity for tourism businesses to access credit and increase their liquidity in order to keep their operations and maintain jobs.

Finally, travel facilitation measures such as applying visa on arrival, decreasing the cost of visas or, in some cases even, exempting visa requirements for a certain number of source markets are major steps towards the resilience of the sector, and the economic recovery at large.

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<sup>7</sup> Information collected up to 31<sup>st</sup> August 2009.

**Table 1. Summary of Stimulus Measures for Tourism Recovery by Country**

REGIONS	FISCAL	MONETARY	HUMAN RESOURCES/ EMPLOYMENT	MARKETING	TRAVEL FACILITATION	PUBLIC/ PRIVATE PARTNERSHIPS	REGIONAL COOPERATION	ENVIRONMENT
<b>AFRICA</b>								
Morocco	X	X		X		X		
South Africa	X	X		X		X		
Tunisia		X	X	X				
<b>AMERICAS</b>								
Argentina	X	X		X		X		
Antigua and Barbuda	X		X	X				
Aruba				X				
Bahamas	X	X		X		X		
Barbados		X	X	X				
Bolivia		X	X	X		X		
Brazil	X	X		X	X	X		
Canada		X	X	X		X		X
Costa Rica		X		X		X	X	
Dominican Republic				X		X	X	
Grenada	X		X					
Jamaica	X	X	X	X		X		
Mexico	X	X		X				
Nicaragua					X		X	
Saint Lucia				X				
Saint Vincent & the Grenadines	X	X						
United States of America	X			X		X		
Uruguay	X			X		X		

ASIA AND THE PACIFIC								
Australia				X		X		
Brunei Darussalam			X	X		X		
Bhutan	X			X		X		
Cambodia	X			X	X	X	X	
China	X	X		X		X		X
Fiji				X	X	X		
Hong-Kong (China)	X	X		X	X	X	X	X
India	X	X		X		X	X	
Indonesia		X	X	X		X	X	
Iran, Islamic Republic of		X		X	X	X		
Japan				X		X		
Macao (China)	X	X		X		X	X	
Malaysia		X		X				
Maldives	X	X		X		X		
Nepal		X	X	X		X		
New Zealand		X	X	X			X	X
Pakistan	X	X	X	X	X	X	X	
Philippines	X		X	X		X		
Republic of Korea		X	X	X		X		X
Singapore		X	X	X		X	X	
Sri Lanka		X		X			X	
Thailand	X	X	X	X	X	X		
Vietnam	X	X	X	X		X	X	
EUROPE								
Austria		X		X		X		
Belgium		X	X			X		
Bulgaria		X		X		X		
Croatia	X			X		X		
Cyprus	X	X		X				
France	X	X	X			X		

Germany	X	X		X		X		
Greece	X	X	X		X			
Hungary		X		X		X		
Israel	X		X	X		X	X	
Italy		X		X		X	X	
Netherlands	X			X		X		X
Norway	X	X						
Portugal	X	X		X				
Slovakia					X			
Slovenia		X		X				
Spain	X	X	X					X
Tajikistan	X					X		
Turkey								
<b>MIDDLE EAST</b>								
Egypt	X		X	X		X		
Jordan	X			X		X	X	
Oman				X		X		
Qatar		X						
Saudi Arabia	X	X	X	X		X	X	
Syrian Arab Republic	X			X		X		
Yemen	X							

**Table 2. Stimulus Measures for the Tourism Sector by Country (by 21st August 2009)**

Country	Crisis Measures
<b>AFRICA</b>	
South Africa	<p>South Africa is focusing on the development and support of tourism small business, development of tourism and general infrastructure and vigorous marketing aiming at taking full advantage of the 2010 FIFA Football World Cup.</p>
Morocco	<p>A new plan (<i>CAP 2009</i>) has been built end 2008 aiming at keeping Morocco attractive to tourists and deal with the impact of the crisis. The <i>CAP 2009</i> has six main axis:</p> <ul style="list-style-type: none"> <li>◆ Increase inbound tourism by aiming at market that might be less impacted by the crisis such as Eastern Europe and the Middle East;</li> <li>◆ Reinforce the positioning of Morocco abroad;</li> <li>◆ Reinforce and develop domestic tourism;</li> <li>◆ Improve the experience of tourists visiting the country and increase their level of loyalty;</li> <li>◆ Maintain the dynamism of tourism investment;</li> <li>◆ Reinforce the follow-up of the market through the constitution on a 'surveillance unit' and of the work of the Tourism Observatory.</li> </ul> <p>The plan is funded by an increase of 10% (US\$ 13.5 million) in the 2009 budget. Marrakech, Fes, Casablanca and Agadir have been identified as priority regions and two new tourism areas set to be opened (Saïdia and Mazagan). Promotion will aim at markets in Europe, the Gulf region and in Russia and have a strong public/private cooperation basis.</p>
Tunisia	<p>Specific tourism response to the economic crisis includes additional promotional and advertising budget, particularly targeting the European market. In addition, the measures seek the preservation of historical areas, development of products such as cultural festivals and golf courses, as well as the strengthening of international air transport and the establishment of a programme to upgrade hotels.</p> <p>Measures include:</p> <ul style="list-style-type: none"> <li>◆ Additional budget for promotion;</li> <li>◆ Strengthening of the international air transport to Tozeur and the domestic air transport to Tabarka and Tozeur;</li> <li>◆ Establishment of a programme to upgrade hotels whilst carrying out the modernization of vocational training centres in coordination with all parties involved;</li> <li>◆ Conclusion of the ongoing projects and golf courses;</li> <li>◆ Increase in the use of historic and archaeological sites and promote large-scale international festivals;</li> <li>◆ Improvement of the aesthetics of tourist resorts and the cleanliness of their environment.</li> </ul>

AMERICAS	
Argentina	<p>As part of its stimulus package to face the global economic downturn, Argentina has developed no-interest loans to boost domestic tourism. A cooperation agreement has been established between SECTUR, the chamber of credit and debit cards and the business associations of the sector. Through this agreement 500 tourism business including hotels, travel agencies and restaurants, will accept credit card payments with between 3 and 6 instalments without interest. This measure aims at favouring purchases in and toward domestic destinations. Simultaneously, SECTUR will promote the enterprises and products adhered to the agreement.</p> <p>Argentina is also giving fiscal and monetary incentives to the sector:</p> <ul style="list-style-type: none"> <li>◆ In the framework of the programme <i>Blanqueo de capitales</i> those who earmark funds to all types of investments in tourism will benefit from a tax rate differential of 1%;</li> <li>◆ In order to encourage the refurbishment and extension works in the hotel sector, the National Bank has made available a soft credit line of 300 million pesos (US\$ 78 million).</li> </ul>
Antigua and Barbuda	<p>Antigua and Barbuda has implemented an Emergency Economic Plan, launched in November 2008, which seeks to provide some relief to the tourism sector in meeting the cost of its operations, and to protect workers in the industry from being laid off. Some measures include discounting of electricity bills for hotels, establishment of joint marketing strategy and preferential tax rates.</p>
Aruba	<p>As a measure to face the crisis, the Aruban Tourism Authority has decided to reinforce marketing in North America, South America and Europe, mainly by the use of online promotional tools. In this direction, more money has been allocated to increase online promotion. A specialised company will provide 24 hours chat. Aruba is promoting itself in Twitter and Facebook.</p>
Bahamas	<p>The following measures have been taken to stimulate travel to The Bahamas:</p> <ul style="list-style-type: none"> <li>◆ Reduction in airfares by lowering or eliminating airport taxes (a programme of discount in airfares officially effective July 2009 for the island of Grand Bahama, which will be extended later this year to Nassau and Family Islands);</li> <li>◆ Strengthening of the Bahamas tourism industry via infrastructure and capital projects: infrastructure and capital projects include redeveloping the Lynden Pindling International Airport and dredging the Nassau Harbour, which will allow the region to receive the world's largest cruise ships, capable of accommodating 5.000 passengers. Likewise, In May 2009, the Government announced its commitment to maintain capital expenditures for its major projects, such as the New Providence Roads Project, the Nassau Harbour Project the redevelopment of the old City Market site and the upgrade of Marsh Harbour International Airport;</li> <li>◆ Creation of an all inclusive destination concept with buy-in from all major tourism suppliers;</li> <li>◆ Special focus on the North American market capitalizing thus on its proximity to the Bahamas: the aim to is obtain lower air fares and increase airlift by decreasing or eliminating airport costs inclusive of customs and immigration overtime charges. Measures also include a strategy to add new USA gateways, taking advantage of US immigration and customs pre-clearance facilities in New Providence and Grand Bahama. Regarding marketing and promotions, the Ministry has launched advertising campaigns in major markets such as New York, Philadelphia, Boston, and Washington, to promote the country and limit the drop in tourist arrivals.</li> </ul>

Barbados	<p>The Government of Barbados has agreed to provide BDS\$ 15 million (US\$ 7.5 million) to assist failing properties and to maintain employment in the tourism sector. The Tourism Industry Relief Product (TIRP), together with the BDS\$ 20 million (US\$ 10 million) that was already made available to the Barbados Tourism Authority (BTA), aim to mitigate the worse aspects of the current economic crisis as a result of their marketing budget increase.</p>
Bolivia	<p>Bolivia aims to strength community enterprises and its initiatives by providing support to organizational and administrative management. Likewise, it will continue reinforcing promotion and marketing of Bolivia as a destination for rural tourism.</p> <p>Response measures in the area of tourism include:</p> <ul style="list-style-type: none"> <li>◆ Strengthening the community enterprises by providing organizational and administrative management support;</li> <li>◆ Promotion and marketing of Bolivia as a destination for rural tourism.</li> </ul> <p>Transversal policies include:</p> <ul style="list-style-type: none"> <li>◆ Natural resource, environmental and cultural management;</li> <li>◆ Income redistribution policy (<i>Distribución de la Renta Dignidad</i>).</li> </ul>
Brasil	<p>Brazil has a strategy for its short and long term international promotion detailed in its International Tourism Marketing Plan (<i>Plano Aquarela</i>). Its main goal is to build a new image of Brazil as a tourism destination, a country and a market. That long-term strategy has not changed but has been adapted to the new scenarios presented by the current crisis. One of the most relevant measures adopted by Brazil to deal with the crisis is the improvement of the promotional actions in the neighbour countries of South America through a 20% increase in the amounts invested in promotion and marketing in those countries for 2009.</p> <p>Brazil has adopted several initiatives to promote international, neighbouring and domestic tourism, namely:</p> <ul style="list-style-type: none"> <li>◆ Promotional campaigns <i>Brazil Now and Brazil Sensational!</i>: Thanks to the coordinated work of Embratur (the Brazilian Tourism Organization) with the private sector, the promotional campaign <i>Brazil Now</i> was launched in April 2009, offering packages with special prices for South American tour operators. In view of the success of this campaign, entirely developed through internet, Embratur is preparing a second phase by reinforcing negotiations with tourism companies and organizations and including new destinations and markets. Conversely, there is an additional effort to enhance communication and promotion of Brazilian tourism destinations around the world through the ongoing <i>Brazil Sensational!</i> campaign, which uses Internet as the main communication tool.</li> <li>◆ Travel facilitation and decrease of minimum prices for international flights: The Brazilian government has decided not to create any kind of fee that may impose barriers for international tourism flow. Within this framework, the Tourism Minister of Brazil announced on June 2009, in his visit to Colombia, the suppression of passport, visa and vaccination requirement for Colombian nationals, as an initiative to incentive neighbouring tourism. Likewise, the Civil Aviation National Agency (ANAC) has approved the gradual cut of the minimum prices, previously established for all international flights initiated from Brazil. Up until April, these prices have been gradually cuts until they are completely extinguished. It must be highlighted, however, that this fare has not been applied to South American countries since 2008.</li> <li>◆ Incentives to domestic tourism: The Ministry of Tourism has intensified the advertising campaigns to encourage Brazilians to travel inside Brazil all year round, particularly in those days before holydays. The Caixa Econômica Federal, one of the state Banks in</li> </ul>

	<p>Brazil, released a special line of credit to finance domestic trips with interests lower than those of the market, allowing a 10 months term. The goal is to provide easy credit to heat up the domestic tourism market. Since 2007, the Ministry launched a programme to promote travelling for retired people, in collaboration with tour operators and Brazilian travel agencies, with discounts for several destinations during the low season.</p>
<p>Canada</p>	<p>The government of Canada has allocated CAD\$ 800 million (US\$ 726 million) in the federal budget to support the tourism and travel sector, provide stimulus to the industry in these challenging economic times and address several longstanding competitiveness issues. Among the initiatives for the tourism sector are:</p> <ul style="list-style-type: none"> <li>◆ CAD\$ 40 million (US\$ 36 million) over two years to the Canadian Tourism Commission: CAD\$ 20 million (US\$ 18 million) for domestic marketing and CAD\$ 20 million (US\$ 18 million) for emerging markets. According to the Canadian Tourism Commission (CTC), the money will be targeted into partnered marketing programs that will effectively increase tourism revenues to the small- and medium-sized businesses- the backbone of Canada's tourism economy;</li> <li>◆ CAD\$ 100 million (US\$ 91 million) for marquee festivals and events over two years;</li> <li>◆ CAD\$ 150 million (US\$ 136 million) for Canada's national parks system over two years: CAD\$ 75 million (US\$ 68 million) for visitor facilities and CAD\$ 75 million (US\$ 68 million) for national historic sites;</li> <li>◆ CAD\$ 25 million (US\$ 23 million) to create new hiking trails across the country;</li> <li>◆ CAD\$ 407 million (US\$ 370 million) for improvements to passenger rail service in the Montreal to Toronto corridor operated by VIA Rail;</li> </ul> <p>Additional funding of projects which will assist in the development of vital tourism infrastructure include:</p> <ul style="list-style-type: none"> <li>◆ CAD\$ 24 million (US\$ 22 million) over two years for cruise ship tourism;</li> <li>◆ CAD\$ 60 million (US\$ 54 million) over two years for local and community cultural and heritage institutions, i.e. theatres and museums;</li> <li>◆ CAD\$ 140 million (US\$ 127 million) over five years for Northern Economic Development, a substantial portion of which will be directed towards tourism projects.</li> </ul>
<p>Costa Rica</p>	<p>Costa Rica has created an Internet-based digital map for tourists. According to the National Chamber of Tourism (CANATUR) this new service would provide information on Costa Rica's borders and roads, main tourism destinations and available services to a global audience of potential tourists. The initiative seek to develop a more suitable and accessible product to tourists using the Internet to get information about destinations. Conversely, CANATUR has joined forces with the private sector and the Costa Rican Institute for Tourism (ICT) to strengthen sustainable tourism. Under this initiative CANATUR will create the Department for Tourism Sustainability, to assess and unify companies that have or will obtain a Tourism Sustainability Certificate (CTS), as well as to provide the private sector with training and technical assistance on management for social and environmental sustainability, certification standards and marketing of sustainable tourism.</p> <p>The government has also established at the outcome of the crisis, a public/private platform to follow up on market performance and decide on most adequate measures to be undertaken.</p>

Dominican Republic	<p>In a joint cooperation initiative, Puerto Rico and the Dominican Republic will launch multi-destination tour packages available from September 2009, in order to increase European and American visitors and boost passenger traffic. With this initiative the two countries are expecting to attract Europeans who visit the Dominican Republic to Puerto Rico and in the opposite direction, ensuring that Americans who visit the Free Associated State travel to the eastern part of the island. However, the objective is not only to attract tourists from third countries, but additionally to encourage interregional tourism between the countries.</p> <p>In addition, the Committee for the Implementation of a Comprehensive Unified Service System for Investment in Tourism was established in March 2009.</p>
Grenada	<p>The government has provided a 50% tax break to hoteliers during the months of May and June 2009 as a means of ensuring that there will be no hotel and guesthouse closures and guaranteeing at least three days work per week for all permanent staff and use the services of temporary staff as often as possible. The objectives of the 50% waiver on general consumption tax for these months which are traditionally low occupancy months, is to preserve existing jobs in the tourism industry especially in hotels and guesthouses during this economic crisis; and preserve the direct airline services negotiated by the Airlift Committee.</p> <p>The relief, which was negotiated by the Grenada Hotel and Tourism Association, will be applicable during the months of May and June 2009 with the possibility of an extension. However, hoteliers and guesthouse owners accepting the discount must file outstanding financial statements and corporation tax returns. According to the agreement, hoteliers must also disclose the salaries of shareholders and directors, disclose plans to attract visitors to Grenada during the off-season, provide monthly statistics of guests to the Grenada Board of Tourism (copied to the Ministry of Finance) on occupancy levels and a statement on the number of jobs provided by the industry broken down by hotel, names of employees and job categories. A further relief for the period July-September 2009 and possibly October-December 15, 2009 will be considered.</p>
Jamaica	<p>The stimulus measures implemented by Jamaica include:</p> <ul style="list-style-type: none"> <li>◆ Assistance to ground transport operators through a US\$ 50 million loan facility: the loan has been made available by the Tourism Enhancement Fund (TEF) and is designed to assist contract carriage operators with maintaining and purchasing vehicles.</li> <li>◆ Extension of the stimulus package offered to tourism stakeholders to counter the impact of the global economic recession on the sector: the stimulus package, which was in force from January through June and offered a 50% cut in General Consumption Tax (GCT) for the industry (from 8.25% to 4.12%) as well as a loan scheme, and an increased marketing budget. The tax cut is expected to maintain employment rates and keep market incentives in place for the hospitality sector during the fall season, which is traditionally a slow period for tourism.</li> <li>◆ An aggressive multi-tiered national sales programme of trade and consumer promotions to create the highest visibility in key markets (USA, Canada and the UK);</li> <li>◆ An aggressive, comprehensive, and competitive public relations, advertising and promotional plan with an overall goal to incentivize potential visitors and travel partners through their passions.</li> <li>◆ Growing online presence with a marketing strategy aimed at increasing knowledge of Jamaica, its products and services and update consumers quickly and effectively on activities happening on the island.</li> <li>◆ The Jamaica Tourism Board (JTB) has also collaborated with local airline Air Jamaica in a Winter Rescue prize promotion based in New York during January 2009, where Jamaican advertisement on taxicabs were designed to attract New York consumers through</li> </ul>

	the accessibility and value of the destination as a tropical getaway during the challenging economic situation and colder weather period.
Mexico	Mexico's government is implementing extraordinary fiscal and financial stimulus measures, totalling MXN\$ 17.4 billion (US\$ 1.3 billion) aiming at a fast reactivation of the tourism industry. A promotional campaign has been designed to win back the trust of international tourists. In addition, the Secretary of Treasury and Public Credit will offer fiscal incentives to tourism companies, such as a 50% reduction of costs towards the use of air space and cruise ports, as well as a discount of 20% in management quotas paid to the Mexican Institute of Social Security (IMSS).
Nicaragua	Nicaragua is implementing visa facilitation measures such as the elimination of visa requirement for nationals of Costa Rica.
Saint Lucia	The Government of Saint Lucia has increased the resources available for tourism marketing.
Saint Vincent and the Grenadines	The Government of Saint Vincent and the Grenadines has established several measures to support the tourism sector, which include a preferential rate for electricity, tax rebates for hotel and yacht operators and a loan facility for hoteliers.
United States of America (USA)	<p>On May 2009, the United States Senate Committee on Commerce, Science &amp; Transportation approved the Travel Promotion Act of 2009. Through this legislation, a public-private partnership has been created with an annual budget of up to US\$ 200 million to attract international travelers to the USA by better communicating America's security policies and competing for visitors. In addition, the Travel Promotion Act specifies that travel promotion would be paid for by private sector contributions and a US\$ 10 fee on foreign travelers from countries that do not pay US\$ 131 for a visa to enter the country.</p> <p>The legislation requires no contributions from national taxpayers, and is expected to help the United States of America create thousands of new jobs and increase travel and spending by international visitors. The bill also creates an Office of Travel Promotion in the Department of Commerce to coordinate the Department's efforts with the new corporation and expands the existing Office of Travel and Tourism Industries in the Department of Commerce to allow it to research ways to promote international travel to the country.</p>
Uruguay	Uruguay will continue its communication actions, particularly at the regional level, supporting the private sector through promotional activities like participation in trade fairs and on-line promotion. Particular stimulus for Argentina, Uruguay's principal source market, has been implemented. Specifically, the reimbursement of fuel charges for those staying in formal accommodation and taxes discounts in restaurants for credit card payments. In addition, the Government has implemented a system by which tourists can buy national products tax-free. Additionally, real-estate companies' commissions for rentals to non-residents will be included in the services export regime, while the Tax Administration Department (DGI) will keep a record of dwellings offered for seasonal rental.

## ASIA AND THE PACIFIC

Australia	<p>In response to the financial crisis and its expected impacts, Tourism Australia has developed:</p> <ul style="list-style-type: none"> <li>◆ Close market follow-up: the Global Market Monitor provided the industry and its stakeholders with a detailed monthly report on the conditions and performance of each of its key markets. The Monitor is based on visitor and visa data as well as reports from Tourism Australia's international offices, trade partners and industry colleagues.</li> <li>◆ A special domestic tourism campaign encouraging Australian workers to take their leave holiday at home: the programme called <i>No Leave, No Life</i> was launched by the Minister for Tourism in the end of May, to encourage Australian workers to use their stockpiled annual leaves for holidays in Australia. As a support to this campaign a website has been created (<a href="http://www.noleavenolife.com">www.noleavenolife.com</a>) to inform businesses and their workforces.</li> </ul>
Brunei Darussalam	<p>The Brunei Tourism Board has stepped up its promotional Kenali Negara Kitani (KNK) with a new marketing campaign called <i>10 must-do KNK packages for 2009</i>, in an attempt to compensate for the forecasted slowdown in international travel. The campaign includes 10 packages conducted by several organizations and tour operators. The campaign will also launch the KNK Passport to encourage more locals and expatriates living in the country to travel and participate in the campaign. The Tourism Board is also working with the Land Transport Department to extend the public transport system and to make Brunei more accessible for its Bornean neighbours of Kota Kinabalu, Sabah, Pontianak and Kalimantan.</p> <p>The objectives of the KNK (Kenali Negara Kitani) are to make of the tourism industry a key contributor in the country's economic diversification plans and a major provider of employment and business opportunities, as well as to create greater awareness of the many tourism attractions and activities available in the country for both domestic and international tourist. The KNK campaign comprises 3 key concepts:</p> <ul style="list-style-type: none"> <li>◆ Promotion of domestic tourism: The KNK campaign promotes to Bruneians and residents the concept of travelling and doing tourism activities within the country, not only by visiting places of attraction, but also by using the services of tourism providers.</li> <li>◆ Awareness of tourism as a key industry for the future: In line with the country's economic diversification drive, the KNK campaign emphasizes to the public at large the importance of developing, sustaining and embracing the tourism industry.</li> <li>◆ Awareness of tourism as a career possibility: The KNK campaign targets students by highlighting the different interesting and rewarding career options available in tourism.</li> </ul>
Bhutan	<p>Bhutan is collaborating with the private sector to offer discounts and keep the minimum daily tariff for tourists unchanged. The Royal Government of Bhutan deferred the tariff revision from US\$ 200 to US\$ 250 that was supposed to take effect from July 2009 to a later date. The minimum daily tariff has not been changed in approximately 18 years despite rising inflation. Additionally, in order to minimize the impact of the current situation on the arrivals to the country, the Tourism Council of Bhutan (TCB) initiated an industry wide consultation, which resulted in a joint response for the tourism sector. From 1st July 2009, a discount of US\$ 20 will be given on the royalty during peak months, while a discount of US\$ 15 will be given during the off season to tourists after their 9th night in the Kingdom. After reducing the fuel surcharge by US\$ 3, TCB has convinced the national airline Druk Air to re-instate the low season discount. In addition, hoteliers have also agreed to suspend the annual 10% increase of their room tariff.</p>

<p>Cambodia</p>	<p>Cambodia is developing and implementing a short term tourism strategy plan in response to the economic downturn challenge. The main issues considered are facilitation of travel, marketing and promotion, domestic tourism promotion and ASEAN region cooperation. The measures and projects that have been taken and planned to implement are the following:</p> <ul style="list-style-type: none"> <li>◆ Travel facilitation: Facilitation of travelling procedures and transportation for tourists within the regional framework. Cross border tourism with neighboring countries is to be further developed by improving services and hospitality at border check point, including the use of a border pass for Cambodian and citizens of neighboring countries. Moreover, to streamline the procedure for mutual travel, the exemption from entry visa between Cambodia and Vietnam has been signed. Additionally, the Government will provide the Visa – K for Cambodian living overseas to promote Visiting Friends and Relatives (VFR) travel, which will become increasingly popular as travelers look to eliminate costs. In addition, Cambodia and Vietnam have agreed to open six new border crossings to boost trade and travel. Initially, there was just one such gate at the Bavet in Svay Rieng province. However, it is thanks to the new gates, from which three were already opened on July 2009, that Vietnam and Cambodia aim to boost the economy at the border, and cut the time spent by people looking to travel from one country to another or within the ASEAN region, and thus, to attract more tourists.</li> <li>◆ Marketing and promotion: Cambodia is taking measures to secure a sustainable growth and attract tourists during this difficult time of global economic slowdown. In October 2008, the Cambodia new branding campaign was launched to promote the country more widely, to attract more tourists and foreign investors. The strategic marketing plan <i>Cambodia – Kingdom of Wonder</i> is focused on promoting the country as a cultural and natural destination. A joint public and private sector working group has met to evaluate challenges and opportunities facing tourism. The Ministry of Tourism will continue to tap in tourism demand, such as the quest for cheaper travel. In terms of internet and promotional information, core messaging and media partnerships are identified as critical for communication. The Ministry of Tourism will continue to target traditional source markets such as ASEAN and East Asia, emerging markets such as India, Russia and Middle East and also the markets that are less affected by the recent global developments.</li> <li>◆ Domestic tourism promotion: As for the domestic market, the objective is to encourage local visitors to travel locally, to boost tourism numbers and flatten seasonality.</li> <li>◆ Regional tourism cooperation: ASEAN countries benefits from increasing air connectivity particularly on low-cost carriers (LCCs). The expansion of open–skies policies and the expansion of the ASEAN highway are providing significant intra-ASEAN travel. Cambodia encourages and proactively works to attract direct flights and upgrade airports in recognition of the need to increase direct air access into and within the country. The country’s third emerging gateway, the Sihanoukville Airport, has been upgraded to cater to larger aircrafts and was equipped with facilities, which will attract regional direct flights in the near future and at the same time improve the quality of tourism services and products in order to attract more visitors. During their January 2009, the ASEAN Tourism Ministers declared 2009-2010 as the youth travelers’ year within ASEAN region. Considering the seriousness of tourism slowdown, Cambodia is taking the initiative with the ASEAN member states to encourage active youths appreciate the diverse cultures within the region.</li> </ul>
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China	<p>In view of the current situation, the China National Tourism Administration (CNTA) is following the direction of expanding domestic demand and promoting consumption stipulated by the Chinese Central Government. The CNTA is adjusting its development strategy and emphasizing the importance of domestic tourism development. Additional measures have been taken in collaboration with the airline industry, mainly towards tax cuts and promotion. Regarding the Green Economy, 2009 was proclaimed as China's <i>Ecological Tourism Year</i> to meet actual tourism green trends and stimulate the industry's sustainable development.</p> <p>Measures taken by China to boost domestic tourism demand and promote tourism consumption include:</p> <ul style="list-style-type: none"> <li>◆ The <i>National Leisure Tourism Plan</i> which intends to improve the quality of life, promote the leisure industry and contribute to increase the revenues from domestic tourism. Several provinces such as Beijing, Guangdong, Zhejiang, and Shandong have initiated the distribution of 'tourism coupons', expected to stimulate Chinese nationals' travel decisions and bring revenue to tourism related industries.</li> <li>◆ 1.8 billion RMB (US\$ 263 million) to refund the quality guarantee deposit for travel agencies: CNTA will refund the quality guarantee deposit submitted by travel agencies to help tourism enterprises overcome the difficult times. According to this policy, travel agencies can claim a temporary refund of 70% of the quality guarantee deposit which they pay to the CNTA when they set up their business. A period of two years from the 4<sup>th</sup> January 2009 to 31<sup>st</sup> December 2010 was granted for the application of this policy.</li> <li>◆ One billion RMB (US\$ 146 million) to improve tourism infrastructure was allocated by the Chinese Central Government to be invested in tourism infrastructure development projects. The major areas for investment are tourism infrastructure, public service facilities and rural tourism.</li> <li>◆ The Civil Aviation Administration of China (CAAC) introduced 10 measures to respond to the financial crisis and promote the stable development of the industry. These measures cover security monitoring, rectifying and standardizing market order, strictly controlling airplane capacity growth, providing political and financial support to fly routes to remote and underdeveloped areas, monetary policies for the benefit of national airlines, adjusting the pricing of fuel, promoting energy saving actions, enhancing the construction of infrastructure, expanding the scope of air services and facilitating the restructuring of enterprises.</li> </ul> <p>A total of 400 million RMB (US\$ 58 million) will be granted to subsidize 100 fly routes to remote and underdeveloped areas which have market potential, newly developed fly routes operated by exclusive airline companies for three years, remote international fly routes supported by special policies and secondary fly routes. In addition, the CAAC refunded domestic airline companies through the civil aviation infrastructure development fund, paid in the second half of 2008 and exempted the fund for the first half of 2009.</p> <p>The CAAC will continue to implement the policies of investment to selected airlines: exemption of fuel surcharge tax, refund of value added tax to international, Hong Kong, and Macao airlines who consume domestic fuel, exemption from flight check fee for selected airports and to subsidize some small and median airports who exempt landing fees for airlines in 2009. Another 400 billion RMB (US\$ 58 billion) will be invested in airport infrastructure. By 2010, there will be 140 airport projects implemented including 50 new airports, 12 remodeled airports, and 78 expanded airports.</p>
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	<p>In addition, the CAAC has introduced a series of actions to save energy and reduce emission of greenhouse gas, such as optimizing the air space and the structure of flight routes, facilitating the use of direct flight routes to shorten the flight duration and improving the technical procedures for the arrival and departure of airplanes. By applying these measures, the CAAC aims to reduce flying and waiting time by 3 minutes for each flight and, as a result, reduce 200,000 hours every year for all flights, which means savings of 4.5 billion RMB (US\$ 658 million) on energy and fuel cost. More importantly, this reduction of flying and waiting time leads to significantly less emission of greenhouse gas from airline industry.</p> <ul style="list-style-type: none"> <li>◆ China will launch promotional campaigns to major international source markets: More effort will be spent on promoting China's tourism to international markets by organizing road shows and other promotional activities in China's major source markets like Russia, Japan, the USA, Australia and New Zealand.</li> <li>◆ The CNTA declared 2009 <i>China Year of Ecotourism</i> with the aim of developing green tourism and raising awareness of environmentally-friendly travel and tourism concepts. More importantly, through the creation and promotion of ecotourism products, it fights the ongoing international crisis and offers new attractions for tourism consumption. This initiative will also expand domestic consumption in tourism by arousing ecological appreciation among Chinese people. All the provinces in China are actively participating in this campaign, promoting their own green tourism itineraries, and in turn, the industry's sustainable development. The campaign started in March 2009 and ends in February 2010.</li> <li>◆ A cooperation agreement has been signed between two cities, Tianjin and Shanghai, to jointly promote tourism brands. The parties, ready to establish a win-win partnership, will share marketing resources and exchange information.</li> </ul>
Fiji	<p>In order to boost tourism, Tourism Fiji continues to carry out tactical marketing within major source markets, especially Australia and New Zealand, focused on 'great value deals' made even more competitive and attractive by the devaluation of the Fijian dollar. These tactical campaigns have been complimented by the branding of destination Fiji and public relation activities. Press campaigns in overseas countries have been driven with a collective approach with Tourism Fiji's partners, airlines, private sector and wholesalers. For instance, a three weeks stimulus campaign was released in March 2009 by Tourism Fiji and their industry partners. In conjunction with many of the destination's hotel and resorts and Australian wholesaler partners, the US\$ 1 million TV and consumer print campaign revolved around the release of a series of specially-priced, all-inclusive Fiji packages. The packages which had to be booked and paid for during the three week period and is valid for travel until September of this year, includes return air fares to Fiji, all accommodation expenses, airport-hotel transfers plus all meals. The campaign was designed to draw attention to the incredible value Fiji currently offers to Australian travellers. It was also intended to drive business directly into travel agencies and towards wholesale partners in the country, and to increase businesses.</p> <p>On the other hand, an Air Services Agreement (ASA) set to be effective from December 2009 is intended to open up air routes into Asia and to Europe and the USA. In addition, Tourism Fiji has approved American based Continental Micronesia's offer to provide nonstop twice weekly service between Fiji and the American ports of Honolulu and Guam hub. Continental Micronesia's service will not only provide connectivity from eight Japanese cities for Japanese outbound travel, but also provide connectivity from major American economic centres like New York, Houston and Los Angeles to Fiji. This agreement will also provide travellers with flight and pricing options and will give them greater flexibility and accessibility.</p>
Hong Kong,	To enhance the competitiveness of the destination, the government of Hong Kong (China) announced the following measures within the

(China)	<p>its 2008-2009 budget:</p> <ul style="list-style-type: none"> <li>◆ Waiving of the hotel accommodation tax starting from 1 July 2008;</li> <li>◆ Exemption of the duty on wine and alcoholic beverages (except spirits);</li> <li>◆ Earmark an additional HK\$ 150 million (US\$ 19.3 million) for promotion and marketing initiatives to attract more international conventions and exhibitions to Hong Kong (China) over the next five years;</li> <li>◆ Finance development of a world class terminal at the old Kai Tak airport site with the first berth expected to be operational in 2013.</li> </ul> <p>In addition, a budget of US\$ 12.8 million was set to assist organizers hosting more attractive events in Hong Kong (China) in the areas of arts, culture and sports over the next three years. This will help raise the international profile of many home-grown cultural and sports events to build up Hong Kong's position as the events capital of Asia.</p> <p>As consumers take less expensive holidays and switch to short-haul destinations, the destination have re-deployed its marketing resources to focus on short-haul markets and stepped up promotions to attract visitors with new tourism products. Other efforts have been taken including the following:</p> <ul style="list-style-type: none"> <li>◆ Asia's meetings industry hub: Hong Kong (China) will play host to a number of large-scale events in 2009 including Art Hong Kong 2009, SIBOS (an international conference/exhibition on financial telecommunications), Aerospace 2009, WONCA (World Organization of Family Doctors) and the Asia Pacific Regional Conference. The newly-established Meetings and Exhibitions Hong Kong office of the Hong Kong Tourism Board will provide one-stop support for event organisers and will enrich the travel experience of meetings visitors through the arrangement of special cultural programmes.</li> <li>◆ Host of 2009 East Asian Games and other mega events: The Hong Kong 2009 East Asian Games will be held in December. This is one of Asia's showpiece multi-sport competitions, featuring top-class athletes from across the region, with more than 3,500 athletes, competing for 290 gold medals in 23 sporting events. Moreover, the Tourism Board will inject new entertainment elements such as <i>Hong Kong Summer Temptations</i> and <i>Hong Kong Winterfest</i>; and stage brand new events including an Asian music festival and a 10-day wine and dine festival, as marketing platforms for the destination.</li> <li>◆ Easier entry for visitors: Hong Kong (China) is one of the world's most immigration-friendly cities. Travelers from some 170 countries and territories enjoy visa-free access to the city for stays of between seven and 180 days.</li> <li>◆ A further expansion of the Individual Visit Scheme (IVS), which allows residents from 49 Mainland cities to visit Hong Kong (China) without having to join group tours, was announced in December 2008. Furthermore, Hong Kong (China) expects to sign in the near future, a mutual visa-free access agreement with Russia.</li> <li>◆ Ecotourism: The Tourism Board will stage a brand new <i>Hong Kong Hiking Festival</i> in 2009 and roll out high-end green tour itineraries to showcase the city's natural wonders and living culture.</li> <li>◆ Regional Cooperation: The country is enhancing cooperation with Macao (China) and the Guangdong Province of Mainland China to promote multi-destination itineraries. The year 2009 is also designated as the <i>Hong Kong-Japan Tourism Year</i>, during which new tourism products will be promoted, targeting different source markets in Japan.</li> </ul>
India	<p>The Indian government, in collaboration and association with all the stakeholders in the tourism industry, has announced initiatives to reduce the impact of the economic slowdown, through its tourism offices overseas. During the first half of the year, the majority of the plan was focused on marketing and promotion of key Indian destinations in their main source markets, with initiatives such as the Market Development Assistance (MDA) Scheme, the <i>Visit India 2009</i> promotional plan, the organization of road shows and familiarization trips, as well as the participation at major international travel fairs. Continuing with the efforts taken to increase the number of foreign tourist arrivals for the second half of 2009, the Tourism Minister has stressed the importance of reaching out to new and potential source</p>

markets. In this direction, promotional activities have been organized in Scandinavia and Russia for August and September 2009.

Initiatives announced during the first half 2009 include:

- ◆ Expansion and liberalization of the Market Development Assistance (MDA) Scheme of the Ministry of Tourism to promote tourism in the overseas markets and provide increased assistance and financial support to tourism service providers, for the promotion of Medical Tourism and Convention and Conference Tourism.
- ◆ A *Visit India 2009* promotional campaign to encourage visits of foreign tourists to India during the period April 2009-December 2009. Under this scheme, incentives are being offered by airlines, hotels, tour operators, wellness centers and resorts and others, to all tourists visiting the country during the current year.
- ◆ Familiarization tours for overseas, media and travel trade representatives to key destinations in India.
- ◆ Subsidies set by the Ministry of Tourism until March 2010, for the Travel Industry and State Governments in the India Portions, to participate at major international Travel Fairs/Exhibitions.
- ◆ Media and outdoor advertising campaigns in all important cities worldwide. *Incredible India* advertisement has been visible at the International Film Festival at Cannes, the Penn Station in New York, metro station in Singapore, on hoardings in Tokyo, Milan, cable cars in San Francisco, taxis, buses and trams in Tokyo, Milan, New York, Miami, Chicago, London, Seoul, Philadelphia, Toronto, Bahrain and Muscat and many others.
- ◆ A series of road shows organized with the support of their Overseas Offices in key source markets including USA, Canada, UK, Ireland, Japan, Rep. of Korea, Singapore, Malaysia, Australia and Dubai.
- ◆ Liberalization of the conditions for availing External Commercial Borrowing (ECB), for hotels in the corporate segment.
- ◆ Rationalization of Aviation Turbo Fuel (ATF) charges, resulting in substantial reduction in air fares.

In August 2009, the Tourism Minister stressed the importance of reaching out to new and potential source markets, while continuing to work with their traditional source markets. As an initiative in this direction, the Ministry of Tourism in collaboration with the PATA India Chapter, have been organizing a series of Road Shows in Scandinavia and Russia.

Additional actions underway for the development of niche tourism products include:

- ◆ Framing of guidelines for the development and promotion of Caravan Tourism, as well as a Tourism Heliport for destinations in hilly and remote areas which have tourism potential but lack good connectivity.
- ◆ The Ministry will also grant central financial assistance to State Governments or Union Territory Administrations for the construction of one Convention Centre in each State/Union Territory, for promotion of the meetings industry.
- ◆ For providing greater exposure to Wellness & Medical Tourism segment, the Ministry of Tourism is organizing a focused Medical Tourism Road Show in Dubai on October 2009.
- ◆ Adventure Tourism Road Shows are being organized in collaboration with the Adventure Tour Operators Association of India, for a targeted audience in Australia and New Zealand.
- ◆ For promoting tourism in the Buddhist circuit, Indian Railways has launched a special tourist train – the 'Mahaparinirvana'. The train starts from Delhi and the eight day package covers the important Buddhist sites of Bodhgaya, Nalanda, Rajgir, Varanasi, Kushinagar and Sravasti.
- ◆ The Tourism Ministry is aware of the opportunity for showcase India during the Commonwealth Games, scheduled to be held in Delhi in 2010.

	<p>Finally, India and Singapore have signed a Joint Action Plan on Tourism Cooperation in August 2009 aimed at:</p> <ul style="list-style-type: none"> <li>◆ Strengthening joint marketing collaboration in third countries such as ASEAN countries and China.</li> <li>◆ Promote reciprocal visits of media representatives, travel agents and tourism operators, with the aim of creating awareness about tourist attractions in each others' countries.</li> <li>◆ Participating in tourism fairs in India and Singapore, respectively.</li> <li>◆ Considering the organization of a Singapore and an India week at the sidelines of tourism fairs.</li> <li>◆ Promoting and encouraging human resource development in tourism industries by collaborating through exchange programmes for faculties, and by exchanging information on teaching modules and curriculum.</li> </ul>
Indonesia	<p>The efforts taken by the Government of Indonesia in coping with the crisis aim to intensify the initiatives aimed at the short haul market, especially neighboring countries such as Malaysia, Singapore and Thailand, as well as medium haul markets which are connected by direct flights or have new flight connections including Australia, Japan, the Republic of Korea, China, Hong Kong (China) and Taiwan (Pr China). On the other hand, Indonesian and Malaysian tourism authorities are working together to enhanced cooperation in the Asian market. Initiatives include joint promotion, increased flight services, incentives and travel discounts.</p> <p>Main measures taken by Indonesia include:</p> <ul style="list-style-type: none"> <li>◆ Policy on tourism development 2009 <ul style="list-style-type: none"> <li>- The re-launch of the <i>Visit Indonesia Year</i> focusing in 2009 on Marine tourism and the meetings industry but without leaving out other market segments of special interest such as ecotourism and adventure tourism.</li> <li>- The launch of the national programme <i>Kenali Negerimu, Cintai Negerimu</i> ('know your country by travelling across and you will love it') to stimulate domestic tourism.</li> </ul> </li> <li>◆ Marketing strategy <ul style="list-style-type: none"> <li>- Enhancement of marketing and promotion for international and domestic tourism by utilizing printed and electronic media, supporting various international events and supporting Indonesia promotion offices abroad which cover promotion of tourism, trade and investment.</li> <li>- Establishment of 10 representatives of tourism promotion abroad in the cities of Tokyo, Sydney, Kuala Lumpur, Seoul, Singapore, Guangzhou, London, Frankfurt, Dubai and Moscow.</li> <li>- Facilitation of direct promotion of qualified products for special niche market.</li> <li>- Co-marketing with airlines, hotels, travel agents, IT Companies and international tourism organizations.</li> <li>- Focusing on e-marketing and in media promotion campaigns</li> <li>- Organization of events and festivals, namely in cross-border areas to generate foreign tourists.</li> <li>- Setting up of marketing task forces consisting of multi stakeholders based on market priorities.</li> </ul> </li> <li>◆ Destination development strategy <ul style="list-style-type: none"> <li>- Development of 15 destinations other than Bali, focusing on marine tourism, the meetings industry, and culture and sport tourism development.</li> <li>- Facilitation of the development of tourism at priority destinations, for example, by providing supporting funds for improving quality of tourism attractions.</li> <li>- Enhancement of competencies of tourism industries, for example, in developing tourism packages.</li> <li>- Developing tourism attractions with professional approach and sustainable tourism development beyond Java and Bali Island.</li> </ul> </li> <li>◆ Human resource strategy</li> </ul>

	<ul style="list-style-type: none"> <li>- Capacity building for human resource development.</li> <li>- Mapping of human resources development on tourism.</li> <li>- Improvement of recruitment systems for obtaining qualified human resources</li> <li>- Policy of zero unemployment after one year of graduation from tourism schools, under the supervision of the Ministry of Culture and Tourism.</li> <li>- Capacity building and technical assistances for tourism industries in 15 priority destinations: Java and Bali, North and South Sulawesi, North, West and South Sumatera provinces, West Papua and East Kalimantan.</li> </ul>
<p>Iran, Islamic Republic of</p>	<p>Iran (Islamic Republic of) is encouraging domestic tourism by collaborating with the accommodation sector and other tourism businesses to design low cost trips and discounts for domestic tourists and governmental employees. In addition, the government is easing visa requirement procedures and increasing promotion in Iran's target markets.</p> <p>To encourage domestic tourism in the low season and to smooth seasonality, Iran's government has made an agreement with the accommodation sector and other tourism businesses to design and provide low cost trips to Iranians. For governmental employees nationwide, 3,054,175 travel cards were issued so they can benefit from a discount of 20% to 50% on hotels, hotel-apartments and handicraft shops all over the country in any low or high season.</p> <p>Regarding visa facilitation, Iran's government launched an electronic Visa system through which tourists from any nationality can apply for an E-Visa that will be issued within 48 to 72 hours. Up to date, 300.000 E-visas have been issued for international tourists around the world.</p> <p>In order to provide potential international tourists with proper information and efficient promotion of Iran's tourism, Tourist Information Centers have been established in 10 countries, namely in Turkey, Kuwait, Oman, Thailand, Pakistan, Greece, Syria, Republic of Korea, Japan, and Bahrain. Iran's Cultural Heritage, Handicraft and Tourism Organization will continue its participation on international tourism exhibitions all over the world such as JATA, WTM, ITB, BIT and FITUR, to promote Iran in target markets.</p>
<p>Japan</p>	<p>The Japanese government is encouraging the expansion of two-way tourism between Japan and the world, through the auspices of the Tourism Nation Promotion Act. This is the aim of the <i>Visit Japan Campaign</i> and the <i>Visit World Campaign (VWC)</i>. The VWC brings together the Japan Association of Travel Agents (JATA), the Ministry of Land, Infrastructure, Transport and Tourism (MLIT), and related government ministries, tourism offices, airlines, airport authorities and other concerned parties as members of the VWC 20 million travelers promotion special committee (VWC Committee) and establishes the VWC Promotion Office at JATA. The two bodies are tasked with stimulating outbound travel from Japan's regions.</p>
<p>Macao (China)</p>	<p>To deal with the potential impact of the current economic downturn on tourism, Macao (China) is implementing the following measures:</p> <ul style="list-style-type: none"> <li>◆ Suspension of tourism tax (5%) for restaurants.</li> <li>◆ Waive fees for participation in overseas travel trade/consumer fairs for Macau travel industry representatives.</li> <li>◆ Support to travel agencies for the development of overnight heritage tours in Macao (China).</li> <li>◆ Cooperation with airlines &amp; tour operators to develop value-added packages for target market segments (focus on incentives, family, high-spending female, honeymooners and world heritage-conscious segments).</li> <li>◆ Cooperation with airlines to open up more direct flights between Macao (China) and other international cities.</li> </ul>

	<ul style="list-style-type: none"> <li>◆ Station tourist guides and provide free presentations for visitors at World Heritage sites, in order to facilitate world-heritage-conscious audience, and encourage longer length of stay.</li> <li>◆ Encourage and support Professional Conference Organizers (PCOs) to participate and organize meetings in Macao (China).</li> <li>◆ Develop networking opportunities for local companies dedicated to the meetings industry in overseas trade shows.</li> </ul>
Malaysia	<p>Malaysia is focusing its efforts on encouraging local and foreign tourists to visit the country through marketing programs and advertising campaigns. Two main examples are the rebranding of <i>Malaysia My Second Home (MM2H) programme</i> and the <i>Zoom Malaysia</i> campaign aimed at the promotion of domestic tourism:</p> <ul style="list-style-type: none"> <li>◆ The <i>MM2H programme</i> was endorsed by the government and introduced in 2002 specifically to attract foreigners wishing to live a meaningful and affordable life in Malaysia for extended periods. The rebranding of MM2H was officially launched on 23 March 2009 by the Ministry of Tourism with the aim of making it more attractive and effective. The new direction is to attract not only foreigners looking to stay long-term or retire in Malaysia, but also high net-worth individuals looking to invest in Malaysia, either by setting up their business here or by partnering with our local entrepreneurs.</li> <li>◆ <i>Zoom Malaysia</i> was launched in May 2008, aiming at encouraging local and foreign tourists to explore the beauty of the country's rainforests that are rich with unique flora and fauna. It is in line with the Government's efforts to promote Malaysia as an eco-tourism destination. The advertising campaign for SMRT trains, busses and taxis in Singapore ran for six months, beginning January 2009. In March, another two campaigns were launched including livery advertising on AirAsia's aircraft and in the Kuala Lumpur International Airport</li> </ul>
Maldives	<p>The Maldivian government sees the current downturn as an opportunity to explore new ways of expanding the tourism industry. In this regard, traditional sun, sea and sand attractions have been complemented by adding culture, tradition, heritage and historical sites to increase the experience of tourists visiting the Maldives.</p> <p>To attain this objective, 63 new tourism projects have being developed and the islands have been leased to expand the tourism industry across the nation. In addition, for supporting tourism developers facing the current difficulties and raising the capital needed to complete the projects, the government has decided to defer the rental payments due in 2009 to be paid over three years starting from 2010.</p> <p>In partnership with the Maldives government, industry operators are offering services on complementary basis. Tourists visiting some of the resorts are given free transport and additional nights; many of such promotional offers are available in most of the islands' resorts.</p> <p>Furthermore, the government has decided to strengthen its marketing and promotional activities. In this regard, the Maldives had a much stronger participation at BIT Milan in Italy and at ITB Berlin in Germany. The President of the Maldives attended the BIT fair and met with the Italian travel trade to discuss promoting and attracting Italian tourists to the Maldives. A Maldivian Night was held during ITB and travel trade officials and media were invited. As well, during an official visit to the UK, the President discussed the future direction of tourism development in the Maldives.</p>

Nepal	<p>The promotion of domestic tourism is one of the major objectives for <i>Nepal Tourism Year 2011</i> tourism campaign. In addition, the government is working proactively to enhance air connectivity with regional, emerging and potential markets.</p>
New Zealand	<p>Tourism New Zealand is concentrating its efforts on maintaining its profile in its principal source markets by taking advantage of its geographical position, as Australians are expected to be keener to holiday closer to home during the crisis. With this objective, the New Zealand Government provided NZ\$ 2.5 million (US\$ 1.7 million) to Tourism New Zealand, to boost tourism promotion in Australia. The funding will help maintain the country's profile in Australia as Australians plan their winter and summer holidays.</p> <p>Additionally, agreements have been signed with partner countries for further development of tourism. For instance, the agreement signed with the Chinese Government, committing tourism representatives from the two countries to meet regularly to discuss tourism issues, and the Air Transport Agreement with Canada, aimed at removing previous limitations on the frequency of provided flights. As a result, New Zealand and Canadian carriers can operate to and beyond each others' country over any routing. As for China, the agreement strengthens the tourism relationship between the two countries. Additional work will go on to formalise a protocol for handling emergencies affecting nationals while on holiday. Tourism New Zealand is having quiet success with its Approved Destination Status (ADS) monitoring unit – twenty companies are now approved under the voluntary code of conduct and around 70 tour guides have graduated to become the first cohort of official ADS-approved guides. Tourism New Zealand has also worked with the Immigration Service in China to introduce a fast-track visa approval system for 'trusted partner' travel agents selling independent holidays.</p> <p>In the area of marketing and promotion, Tourism New Zealand is focusing on building increased awareness in the medium to long term. In the short term, cheap airfares and a strong US dollar exchange rate, together with the newly launched extension of <i>100% Pure New Zealand</i> campaign (<i>The New Zealand Life Back Promise</i>), are expected to stimulate interest in travel to New Zealand in the US market while in the UK, again the exchange rate and competitive pricing on airfares is maintaining interest.</p> <p>In addition, the national Government is taking many other steps to protect New Zealand from the worst impacts of the downturn. They continue to develop the "Jobs and Growth Plan", a series of initiatives aimed at retaining and growing jobs, including the "Small Business Relief Package" and the "Prime Minister's Job Summit". The "Small Business Relief Package" aims to reduce red tape and make managing cash flows and paying taxes less expensive for small and medium businesses. The Job Summit has been developed, in collaboration with key players in the sector.</p>
Pakistan	<p>Pakistan's main measures have been in the area of visa facilitation and air transport.</p> <ul style="list-style-type: none"> <li>◆ Pakistan's visa policy reflects the government policy of liberalization and openness, with a view to make it a tourist friendly country (TFC): Tourist friendly countries have been increased from 2 to 24 for the grant of Visa on Arrival (VOA) for one month validity and multiple entries, for group travel through designated tour operators. Particularly, group tourists from India will be allowed with a 30-day visa (instead of 14 days) through designated tour operators. Meanwhile, Pakistan missions abroad have been authorized to grant double entry tourist/visit visa with a 32 month validity and stay.</li> <li>◆ As for air transport, within the package of incentives and concessions for tourism development approved by the government of Pakistan, permission for chartered flights was given by the Ministry of Tourism in consultation with the Ministry of Interior. Chartered flights are now allowed on point-to-point basis from Karachi, Lahore, Islamabad and Peshawar. Meanwhile, helicopter chartered flight service is allowed anywhere in Pakistan.</li> </ul>

Philippines	<p>The stimulus plan which is intended to insulate the tourism industry from the impact of the global meltdown includes:</p> <ul style="list-style-type: none"> <li>◆ An aggressive marketing strategy to promote the Philippines as the best and cheapest tourist destination, especially for its target markets (the USA and Japan): the Department of Tourism (DOT), in collaboration with airlines and hotels, has cut the cost of tour packages by half. The new tour packages offer discounts between February and April 2009 to USA and Japan markets. Likewise, for the second half of 2009, the DOT will open two stimulus packages for US market, and further packages are in the negotiation phase.</li> <li>◆ Creation of 3.000 new jobs in support of President Arroyo's programme to provide one million jobs in the first six months of 2009</li> <li>◆ Increase of air capacity: due to the attempt of the Civil Aeronautics Board (CAB) to improve their air agreement between the country and the UK, the DOT has presented on August the newly amended air pact which allows 7 flights per week on a B747 aircraft, accommodating more than 500 passengers, between Manila to several points in the UK, including London, Heathrow, Gatwick and Stanstead.</li> </ul>
Republic of Korea	<p>The following measures have been taken to beat the current downward trend of international travel:</p> <ul style="list-style-type: none"> <li>◆ VISA discount promotion: The Korea Tourism Organization (KTO) and Visa card are working together to present a huge discount promotion from April 2009 to March 2010. Visa users from all over the world are eligible for discounts on a range of merchandise, restaurants, leisure activities, and many more of Korea's attractions. Moreover, visitors will also perceive great discounts due to the downward trend of the Korean won against other foreign currencies. During this period, Visa users can pick up a discount coupon booklet that lists all the discount offers available. Locations where visitors can save money include SK Telecom Roaming Centre's cellular phone rental service at Incheon International Airport, shopping centers throughout Seoul's downtown areas, cosmetics shops, amusement parks, restaurants, cafes, hotels and duty free shops. With at least 60 different offers available, visitors will be able to enjoy the benefits from the moment they arrive to Korea. Visitors who make purchases with a visa card, and present the discount coupon booklet, will receive discounts from 5% up to 50% at the participating stores and locations.</li> <li>◆ Shift to domestic tourism: KTO plans to develop and promote high-class domestic tourism products, including golf tourism and school excursions, in order to meet effectively the demands of those who opt to explore domestic destinations instead of international ones.</li> <li>◆ Meetings industry development: The meetings industry has been included as a value-added service industry by the Korean government. Last December, the KTO reorganized its organizational structure to allow the Korean Meetings industry to have more autonomy by specifically promoting the existing bureaus to headquarters and doubling the budget of the headquarters for 2009 over the previous year's budget. Main projects for 2009 are largely divided into three categories: meetings industry infrastructure development, promotion of the country as a meetings host destination, and additional projects to attract more international events. Some of the undertaken initiatives include a basic statistical survey to obtain comprehensive information about the meetings industry; the establishment of a five-year development plan; training of meetings experts and specialists; and the creation of an integrated information system designed to be a source of information and networking among the related businesses.</li> <li>◆ Development and promotion of green tourism: Korea has been active in tackling its energy and environmental shortcomings under a programme entitled <i>Low-Carbon, Green Growth</i>. In an initial effort to extend greenhouse gas reduction to the tourism sector and adopt environmentally friendly measures, the KTO launched a Green Tourism Team in December 2008 with the mandate to oversee and enforce environmental protection and preservation, the promotion of green tourism in Korea and to prevent the degradation of</li> </ul>

	<p>the nation's environmental resources through unsustainable tourism practices. Moreover, the KTO will proactively promote existing green tourism attractions such as Korean Demilitarized Zone, the Suncheon Bay, the Upo Marshlands, the Tidelands of the West Sea and Damyang, and will develop new environment friendly tourism products such as the Gyeongin Canal, a waterway designed to run from Incheon to Seoul. Comprehensive leisure facilities will be located and constructed in connection with these attractions with the funding from the Korean government. In addition, new historical walking courses with the 'storytelling' concept will be developed.</p> <p>Furthermore, the government is committed to the sustainable development of the tourism industry in the long run. For instance, the KTO made a lead to map the Green Growth Policy (GGP) for the industry with the support of the Korea Culture and Tourism Institute. Long term objectives of GGP are to unify tourism with green technology, transform the tourism industry structure and make an eco-friendly value chain of tourism. A series of short term plans have been proposed under the GGP framework including:</p> <ul style="list-style-type: none"> <li>- Development of a low-carbon energy saving accommodation;</li> <li>- Establishment of an eco-system for green travel industry;</li> <li>- Application of green technology in the theme park industry;</li> <li>- Support of zero energy green events;</li> <li>- Promotion of eco-friendly tourism projects;</li> <li>- Enhancement of the understanding of green tourism through PR activities and education.</li> </ul>
<p>Singapore</p>	<p>Singapore introduced four main initiatives to help the tourism sector through these challenging times:</p> <ul style="list-style-type: none"> <li>◆ <i>The Building on Opportunities to Strengthen Tourism (BOOST) Campaign</i>: This S\$ 90 million (US\$ 62 million) initiative aims to increase travel to Singapore and includes tactical marketing campaigns in collaboration with industry partners. The campaign proposes six key elements – the demand of travel to Singapore, the government's funding support to the sector, the sector's capabilities, outreach to Singapore residents, partnership with the industry and the future of the sector. Measures under <i>BOOST</i> include tactical marketing campaigns as well as enhanced assistance schemes, developed in collaboration with tourism industry leaders and partners. The 2009 <i>Reasons to Enjoy Singapore</i> year-long global marketing campaign, which features special offers, is part of the promotional push aimed at 8 key source markets (Indonesia, Malaysia, China, India, Vietnam, UK, Germany and Australia). In the UK, the campaign focuses on the promotion of Singapore as a 'must-see' stopover destination and includes partnerships with a number of operators.</li> <li>◆ <i>Increase financial support to the tourism sector</i>: The direct assistance to the tourism sector includes the waive of license fees for travel agents and tourist guides, the reduction of participation fees in overseas leisure and meetings industry tradeshows, and duty and GST exemption on wine for approved wine exhibitions and conference events. Different types of tourism enterprises are also eligible for other financial schemes, such as the Local Enterprise Finance Scheme, the New Bridging Loan Programme, the Micro Loan Programme, and the Loan Insurance Scheme Plus. Corporate tax policies include the reduction of the corporate tax rate from 18% to 17%, Enhancement of Loss Carry-Back Relief Scheme, Existing Capital Allowance Regime, and Tax Deduction for Renovation and Refurbishment Expenses.</li> <li>◆ <i>Meetings industry development</i>: The BEiS scheme which was approved from 1 March 2009 to 28 February 2010 aims to support and defray the cost of meetings and events. Under this programme the government proposes to maintain the calendar of events and</li> </ul>

	<p>improve its content to ensure the events competitiveness, a Special Assistance Scheme for Value Events (SAVE) to grant overseas marketing of smaller events, a business and events pipeline for support players' overseas business development under the ambit of Alliance Development Scheme and a more aggressive funding support for strategic events.</p> <ul style="list-style-type: none"> <li>◆ Workforce resilience schemes: To help both employers and employees cope with manpower and employment challenges during the economic downturn Singapore's government implemented a series workforce resilience schemes. By applying those schemes, when the economy recovers, the companies will have a more capable and competitive workforce better able to seize new opportunities. The Training Industry Professionals in Tourism Plus (TIP-iT Plus) programme will help to incentivize strategic companies with new or expanding tourism products, whose development requires new or specialized skills. From the 1 March 2009, the scheme will fund training conducted locally by overseas trainers and support the absentee payroll of trainees. Additionally, the government presents the Skills Programme for Upgrading and Resilience (SPUR), a two-year programme leveraging on the extensive Continuing Education and Training (CET) system built over the years, which offers financial incentives in the form of course fee subsidy and compensation for workers' absence during the period of training. When companies send their workers for training under SPUR, they will save more on manpower costs which will in turn help save jobs. On the other hand, the Job Credit Scheme encourages all business to preserve jobs during the downturn. Employers will receive a 12% cash grant on the first S\$ 2,500 (US\$ 1.730) of each month's wages for each employee on their CPF payroll for a year. Additionally, the GEMS-Plus (Go-the-Extra-Mile-for-Service) three-year plan, which follows from the GEMS movement that was launched in 2005, aims to further strengthen Singapore's service standards. Some S\$ 100 million (US\$ 69 million) will be set aside to support and drive initiatives which focus on three main areas over the 3-year period: service capability development under CCI (Customer-Centric Initiative), research and thought leadership and promotion, publicity and recognition for service.</li> </ul>
Sri Lanka	<p>Sri Lanka's main strategy relies on hotel room capacity increase through the development of the Kalpitiya and Dedduwa resorts. An additional 4.000 rooms are expected to be added to the inventory by 2010, with another 1.000 rooms in other areas of Sri Lanka. In turn, the room capacity may be increased by another 6.000 rooms by the year 2016 with the creation of care service resorts, in order to take advantage of the new demand trend of ageing population and enhanced purchasing power.</p> <p>On the other hand, Sri Lanka has been included in an Asian Development Bank funded project to link and promote tourism sites in South Asian countries, especially for eco-tourism and pilgrimage tourism. The project was conceived as an interlinked series of sub-regional tourism investments in five countries: Bangladesh, Bhutan, India, Nepal and Sri Lanka. The project is aimed at better positioning South Asia, especially 'multi-country' circuits in specific target markets, as well as improving cross-border travel. The participating countries also aim to ensure better management of natural and cultural heritage sites of tourism importance in the region and increase the participation of communities in tourism development. As part of the project, the South Asia Tourism Marketing Program is meant to promote the region's ecotourism and Buddhist attractions.</p>
Thailand	<p>Thailand's Government has been continuously approving and implementing tourism stimulus measures to help promote domestic and international travel, as well as to restore the country's image during these challenging times. This has resulted in immediate and medium term initiatives that have been discussed in collaboration with tourism stakeholders: governmental authorities, tour operators, travel agencies, tourism council members, Board of directors of airlines, airport authorities, immigrations, customs departments and commercial banks in the face of the current challenge. Stimulus measures by the Thai government include:</p> <ul style="list-style-type: none"> <li>◆ Promotional campaigns: Additional tourism marketing measures include special campaigns along with stepped-up online marketing.</li> </ul>

Campaigns include the *Thailand Talk to the World* project that involves making a 90-second vignettes of Thai tourism for global media like CNN and BCC World, the *Welcome Back* project, involving media briefings in major trade shows and arranging a Thailand Road Show in China, India, Russia, and America and the *Partner on Demand* campaign, which entails working with industry partners to launch special packages and advertise in local media. Other campaigns incorporate website marketing such as *Thailand Real Time*, for organizing online promotional events and *Thailand Super Deal*, where tourists can find Thailand's best deal packages from hotels, tour operators, airlines, shopping centers, etc.

- ◆ Fee discounting for visitors to Thailand's national parks: Visitors are given a discount of 50% on the entrance fees to national parks, which includes historical sites, wildlife reserves, and marine national parks. The application period of this discount has been extended from its initial 3 months period (February to May 2009).
- ◆ Waiving of visa fees: The Thai government has waived visa fees for all types of tourists travelling to Thailand during the period from 5 March to 4 June 2009. In turn, the government has agreed to extend the exemption of the visa fee for tourist visa applications until the 4 March 2010. The exemption applies to all applicants for a visa on arrival at all international airports in Thailand, as well as those applying at Thai embassies abroad for stays longer than the period for which they are normally eligible.
- ◆ Tax reductions and exemptions for the private sector: For hotel operators, business tax exemption will be effective for the year 2010. There is also a reduction in the deposit amount for electricity usage, equivalent to 1.25 times of electricity usage guarantee for 'good recorded' hotel operators. Approximate rate is based on the past 3 month record.
- ◆ Fiscal and momentary support: The Micro Finance or Micro Credit scheme was issued, with the cooperation of all financial banks in Thailand and the Small and Medium Entrepreneur Bank. Lending period will be for two years with -3% of Median Low Rate (MLR) of interest, -1% from cooperated banks and -2% from the budget allocated by the government. In order to reach those who are really affected by this economic downturn, the sector was requested to be divided into four groups: Hotels, Restaurants, Tour Operator and others. Each group is chaired by one of the Presidents of tourism associations. The President of the Thailand Tourism Council chairs the diverse groups. Each group has to first screen its members and non members who need to ask for this special loan. They have to prove that their businesses are affected by the global economic downturn in 2009 and that they did not have debts previous to the crisis. The project was launched nationally on 17 March 2009 in Bangkok, during which all commercial banks and those concerned opened their booths for the soft loan project. A monitoring committee was set up to follow up the best performances, transparency and efficiency of the Micro-Credit scheme. Regarding recent financial aid approval, the Thai Cabinet has given clearance to the Small and Medium Enterprise Development Bank of Thailand (SME Bank) to offer loans to smaller tourism operators, totaling a THB\$ 5 billion (US\$ 147 million). Of that amount, THB\$ 3 billion (US\$ 88 million) has been allocated to help tourism SMEs currently in debt to the banks. This will help to subsidize the loans given by banks by paying an equivalent of 2% interest for a period of 2 years. Another THB\$ 2 billion (US\$ 59 million) loan was set up for SMEs in the tourism industry which are in debt to government-owned financial institutions. This fund will help pay 2% for repayment of the loan by SMEs for a period of 2 years. Soft loans were set, with a low interest rate from government financial agencies with 0% interest, for a fixed amount of time, followed by a flexible payment return plan. Banks and financial institutions will be requested to show leniency in their approach towards loans given to hotel and or tour operators who are not financially secure. In addition, the government has allowed the companies to file the amount paid for seminar fees within the country and the allowance as an expense and to be calculated as double this amount.

- ◆ Promotion of domestic tourism: Domestic travel has also been on the agenda. A further US\$ 4.4 million has been allocated to bring 2.000 youths from each of the 75 provinces, in total 153.000 people, to travel around Thailand during April to June 2009. They have to be guided by professional tour agencies, use private tour coaches, stay in hotels, have their meals in restaurants and use certified guides. The project aims to encourage Thais to travel within Thailand and generate income in time of crisis. Also, to incentivize domestic meetings and seminars held outside Bangkok, organizers will be able to reduce tax payment by showing their seminar expenses. Additionally, the Convention and Exhibition Bureau has published a directory of the meetings industry venues in the country with information about business facilities in the five geographical areas of Thailand, aiming to boost awareness and confidence in Thailand as a dynamic business event destination.
- ◆ Reduction of landing and parking fees:
  - 50 % reduction of landing and parking fee at all airports under supervision of Department of Civil Aviation for scheduled flights and chartered flights until September 2009
  - 20 % reduction of landing and parking fee at all airports under supervision of Airport Authority of Thailand for scheduled flights until September 2009
  - 50% Reduction for chartered flights at Airports in Chiang Mai, Chiang Rai, Hat Yai and Don Muang until October 2010

To ensure smooth operation of the new international airport, the draft Act on Safety and Security was promulgated. The measures also include planning and conducting rehearsals of airport emergency plans.
- ◆ A new Transit Passenger model: In February 2009, the Transit Passenger model was launched. Travelers changing planes in Bangkok will be facilitated within a shorter time and will be able to leave the international airport for tour programmes, arranged by the Association of Thai Travel Agents (ATTA) in cooperation with the Tourism Authority of Thailand (TAT). Under this initiative, a package tour was introduced in June 2009, for transfer passengers making a stopover of 6 to 12 hours at Suvarnabhumi International Airport to take short tours of Bangkok and the surrounding area.

Furthermore other stakeholders have also been very active. Thai Airways International, the national airline, and Bangkok Airways, the country's leading privately-owned airline, have introduced special promotional campaigns to boost international and domestic travel within, to and from Thailand. Also at local level, the Bangkok Metropolitan Administration (BMA) has announced Bangkok's *Smile Card project* which will be launched in August. The BMA will introduce a boat pass, add information booths, and designate certain roads as walking streets. The *Smile Cards* are part of a wider campaign that tags Bangkok as a *City of Smiles*. About 100,000 Smile Cards are to be produced for tourists to pick up at BMA information booths. It will offer discounts for attractions, shopping, dining, night sightseeing, spa, golf, massage and medical treatment.

Finally, the Ministry has drafted the strategic plan 2010-2012 in order to stimulate tourism. Currently, a budget of THB\$ 16.9 billion (US 497 million) has been allocated for the plan but it might be increased to THB\$30 billion (US\$ 882 million) to be compatible with the plan. This strategic plan consists of infrastructure development, developing variety of activities in order to promote and rehabilitate tourism, security plan to secure tourism, staff development, market system development and image building.

Vietnam	<p>In order to attract tourists, the Government of Vietnam has set a tourism stimulus package with some preferential programmes of declining value added tax (VAT) and extending tax payment duration. Additionally, the Ministry of Culture, Sports and Tourism set up a tourism promotional campaign throughout the country. The campaign is focused on the reduction of tour prices, the development of new tourism products inside the country, on cooperating with neighbouring countries to package the international tours, as well as on the promotion of domestic tourism.</p> <p>According to the Vietnam National Administration of Tourism (VNAT), further efforts should be made to boost the number of domestic tourists. To do this, the VNAT proposes a strategic shift of the tourism sector to more aggressively lure local travelers. However, Vietnam's main strategy still relies on the sector's promotion campaigns, conducted in coordination with other sectors, including aviation and hotels, which aim to minimize the risks posed by both the financial crisis and the A(H1N1) flu outbreak.</p> <p>From August until the end of the year 2009, the tourism sector will attach special importance to deploying a series of national tourism promotion programmes and responding to programmes for the thousand-year Thang Long-Hanoi anniversary and national tourism year 2010. In addition, the Vietnamese government has recently given joint ventures green light to organize outbound tours and allowed, on a pilot basis, certain hotels to keep their entertainment venues open until 2 a.m.</p> <p>At the regional cooperation level, Cambodia and Vietnam have agreed to open 6 new border crossings to boost trade and travel. Initially, there was just one such gate at Bavet in Svay Rieng province. However, it is thanks to the new gates, from which three were already opened on July 2009, that Vietnam and Cambodia aim to boost the economy at the border, and cut the time spent by people looking to travel from one country to another or within the ASEAN region, and thus, to attract more tourists.</p> <p>Regarding air transport, Vietnam Airlines inaugurated Cambodia's new national carrier Cambodia Angkor Air on July 2009 at Phnom Penh International Airport. The new national carrier of Cambodia is a joint venture between the Cambodian government and Vietnam Airlines, Vietnam's national carrier. Cambodia owns a 51% stake in the company, and Vietnam owns the remainder.</p> <p>The same is happening within the country, where the departments of Culture, Sports and Tourism in four northern provinces (Ha Giang, Tuyen Quang, Cao Bang and Bac Kan) have signed a cooperation agreement to boost tourism development, expecting that accelerating coordination will help improve their appeal. Accordingly, the territories will help each other to take full advantage of each province to develop tourism, build tourism management and development mechanisms, and cooperate in developing tours, human resources, infrastructure, telecommunications and tourism promotion. As well, they will organize an annual 'tour of heritage sites' programme (first in Ha Giang, then Tuyen Quang, Cao Bang and Bac Kan).</p>
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EUROPE	
Austria	<p>A specialized bank (the Austrian Tourism Development Bank), which is owned by the three largest Austrian banks, facilitates investment and improves liquidity of the tourism industry. In view of the economic crisis well-proven instruments have been expanded and new ones have been developed together with the Austrian Federal Ministry of Economy, Family and Youth and the Federal Ministry of Finance. Amongst these instruments to be implemented for a period of maximum two years are:</p> <ul style="list-style-type: none"> <li>◆ Subsidized loans to tourism SMEs;</li> <li>◆ Bank guarantees with an increased/doubled liability (guarantee) limit of the Tourism Development Bank (€ 250 millions to € 500 millions in total, with a maximum of € 4 millions per company);</li> <li>◆ Small grants for certain investments, i.e. non-refundable grants are given to tourism enterprises (TOP Tourismusförderung);</li> <li>◆ Micro credits have been introduced as a new instrument for small investments (up to € 50,000) 2.5% interest rate per year;</li> <li>◆ Bridge financing for maximum 2 years to stimulate investment in restructuring measures for those enterprises that are affected by the crisis. Companies which have been stable in economic terms in 2008 can extend their debit limit for a specific period of time based on a government guarantee. The state aid for bridge financing is not applicable for companies in difficulties.</li> </ul> <p>Regarding marketing campaigns, the country is investing an additional sum of € 4 million geared towards the domestic market but also neighboring markets such as Germany, Italy, Switzerland and the Czech Republic, to maintain and activate demand and especially address these markets, which will be more resilient to the crisis.</p>
Belgium	No measures specifically aimed at the tourism sector have been undertaken in Belgium. However the Flemish Recovery Plan consists of general stimulus aiming to strength the granting of credit lines to businesses, activate labor market policy, as well as to strengthen and accelerate public and private investments.
Bulgaria	Bulgaria has launched an upgrade of the airport of its second biggest city of Plovdiv in an attempt to lure tourists and boost cargo transport as the global economic downturn bites. The government will spend 40 million leva (US\$ 26.4 million) to build a new terminal and almost double plane stands to unclog traffic and increase the airport's capacity to 500.000 passengers annually.
Croatia	Croatia has increased the cooperation between the public and private sectors for tourism promotional activities. There are five major areas of co-promotion which include special promotional programmes for shoulder seasons, main seasons (different in value), air-destinations and domestic tourism. Additionally, the funds for promotion have been increased (almost 60% compared to last year) and there will be more presence in the global and other media. Croatia is also advancing in the area of travel facilitation with the abolition of tourist visas for Russians and Ukrainian nationals and tax cuts on hotels.
Cyprus	The government of Cyprus has put together a fiscal programme to address the actual downturn. Cyprus President announced a € 300 million financial package in a bid to boost the Mediterranean island's flagging tourism and construction sectors. Around € 51 million are earmarked for tourism, which includes tax and airport landing fee reductions. At the same time, a scheme to encourage Cypriots to holiday at home was also introduced.

<p>France</p>	<p>One of the main measures implemented in France has been to set VAT of restaurants down to 5.5% effective from the 1st July 2009. This initiative is the culmination of a work undertaken for several months which resulted in an agreement reached by France within the European Union, to allow member countries to apply reduced rates in certain sectors. In the future, the VAT reduction will be returned to the sector and allocated to develop business and employment in catering according to a contract signed between the state and professional organization (contrat d'avenir pour la restauration). According to this, the savings generated by the tax cut will be entirely reflected on the sector. By this agreement, the professional organizations committed to:</p> <ul style="list-style-type: none"> <li>- lower prices in 10 menu categories, so the reduction will be visible to the customers;</li> <li>- job creation through an enhancement of 40.000 supplementary places among temporal and training jobs;</li> <li>- improvement of the employee's conditions, especially in terms of remuneration, professional training and social security issues; and</li> <li>- continuation of the modernization of the sector.</li> </ul>
<p>Germany</p>	<p><u>Measures taken by the tourism sector</u></p> <p>Due to their experience with previous crises (terrorist attacks, the SARS epidemic, the Gulf War, etc.), tour operators have learned how to deal with unpredictable situations. They exercise flexibility in capacity planning and can react promptly to fluctuations in demand. Accordingly, capacities for 2009 have been planned conservatively. Providers of tourism-related services are continuing to invest in their products, although they are certainly placing a priority on cost effectiveness. They expect that the tourism sector will emerge from the crisis in a stronger position and will quickly resume the growth that characterized previous years.</p> <p>In the area of promotion, the German National Tourist Board (DZT) has fine-tuned its tourism marketing by adopting the motto <i>Affordable Hospitality – Great Deals, Easy Booking</i>. The DZT aims to draw foreign tourists' attention to the inexpensive travel opportunities available in Germany. A special new marketing campaign for domestic and international travelers by the German National Tourist Board (GNTB) will focus on Germany's excellent value for money.</p> <p><u>Measures taken by the Federal and Länder governments</u></p> <p>At the global level, the Federal Government's first stimulus package (Konjunkturpaket I), that was adopted on 5 November 2008, supports investments and contracts targeting companies, private households and municipalities. Furthermore, measures were taken to secure financing and liquidity for companies in order to bolster investment financing. The second stimulus package (Konjunkturpaket II), known as the <i>Pact for Employment and Stability</i>, was adopted on 14 January 2009. The main elements of this package include the promotion of investment for the purpose of modernizing the country; labor market policies that prevent layoffs; tax relief and support for families; support for the automotive industry and innovative companies; the securing of credit for businesses; and the introduction of limits on government borrowing. The Federal Government has earmarked a total of roughly €80 billion for the two stimulus packages.</p> <p>In addition to the Federal Government's two stimulus packages, the Länder have also taken measures to secure growth and jobs. The credit and guarantee programmes operated by the promotional and guarantee banks of the Länder have been revised or re-launched in response to the current crisis. The Länder have increased the funding available for guarantees or are prepared to do so if necessary. They have also decided to fast-track infrastructural investments and have adopted additional investment programmes. And in numerous Länder, companies seeking advice can contact telephone hotlines to obtain the information they need.</p> <p>All of these support measures are available to companies in the tourism sector.</p> <p>The Federal Government's tourism policy guidelines address the primary challenges that will face the tourism sector in the future,</p>

	<p>particularly demographic shifts, climate change, and the increasing pressure of competition due to globalization processes. These guidelines aim to optimize the policy conditions for Germany's tourism sector. At the same time, they constitute an appeal to the tourism industry to tailor their offerings to a changing clientele by ensuring high quality, promoting relevant skills and qualifications, and developing new products and services.</p>
Greece	<p>The measures introduced by the Greek Tourism Ministry are aimed at promoting Greece abroad, improving workers' benefits and training, helping tourism businesses cut costs, improving tourism infrastructure, services and businesses, and injecting liquidity into the sector by means of financial aids and tax reduction.</p> <p>Measures taken by Greece include:</p> <ul style="list-style-type: none"> <li>◆ Increase of 50% of advertising budgets for this year's promotion campaign abroad.</li> <li>◆ Cut of municipal taxes for a period of one to two years: these include the Uniform Property Tax on buildings and land, which is reduced from 0.6% to 0.033% of the property's value for the years 2009 and 2010; a one-year suspension of a fee levied by banks on the sum of loans taken out by tourist enterprises; and a tariff levied by local government for the stay of travelers, which is reduced from 2% to 0.5%. The lost revenue for local government will be compensated for by an increase in funds from vehicle road taxes.</li> <li>◆ Return of any VAT due by the local tax offices.</li> <li>◆ Support to the tourism businesses through capital guarantee in collaboration with the Guarantee Fund for Small and Very Small Enterprises (T.E.M.P.M.E). Tourism enterprises will also be able to get start-up capital with fully subsidized interest, up to the sum of € 350,000 from the Guarantee Fund.</li> <li>◆ Implementation of a large investment plan through the NSRF (National Strategic Reference Framework), which provides funding for activities involving tourist infrastructure, services and enterprises.</li> <li>◆ Payment of subsidies due to the tourist enterprises included in the Investment Law under the Public Investment Programme. In addition, tourism enterprises will be eligible for funding under the <i>Programme for Reinforcing Liquidity in the Economy</i>.</li> <li>◆ Strengthen domestic tourism by increasing the number of state-subsidized 'social tourism' tickets offered via the Labor Housing Organization (OEE) by 21%, after last year's increase of 41%.</li> <li>◆ Transformation of the Hellenic Chamber of Hotels into a Tourism Chamber.</li> <li>◆ Special policies to attract Chinese visitors: the new policies will allow Chinese travelers to get a tourist visa more easily. The Greek government is also encouraging Chinese travelers, but especially newly-married couples, to apply for a tourist visa directly, and travel by themselves.</li> <li>◆ Installation of Wi-Fi systems in airports, busy tourist areas and in archaeological sites: this initiative will be continued in other areas to facilitate communications for the visitors and at the same time help them to be fully informed about the history and culture of Greece.</li> </ul> <p>In terms of human and other resources, the government has decided to deal with the long-standing problem of regulating the operation of hotels, to convert the seasonal unemployment benefit into an employment benefit, to run a training programme combining theoretical and on-the-job training, in which the enterprises participating will be obliged to employ 30% of those trained.</p> <p>The Ministry also plans to propose another draft law in Parliament, by September 2009, envisaging a stricter supervision of casino operations and the upgrading of the Greek National Tourism Organization's offices abroad, and the opening of new offices in South Africa, Poland, Ukraine and India. Furthermore, the government is preparing a package of special benefits to any body that will choose</p>

	<p>Greece for organizing conferences. The package will include free movement of delegates by public transport and in special cases even subsidize the cost of the conference center.</p> <p>Additional aid measures have been proposed in collaboration of the Ministers of Transport and Tourism together with the Civil Aviation Authority:</p> <ul style="list-style-type: none"> <li>◆ The first and most important is the decision to suspend the collection of fees in regional airports from early April until the end of September, including course fees and accommodation of aircraft on the ground, virtually eliminating regional airports' fees of between 10 to 12 euro per person, and subsequently reducing costs airlines and tour operators.</li> <li>◆ Reforming airports during the tourist season, to show the best possible image of the country.</li> <li>◆ Preparing, along with the Civil Aviation Authority, some actions for the development of air sports in the country, especially ultra light aviation, parachuting, hang-gliding, paragliding, and model aircraft. The idea is to develop the appropriate aero clubs and necessary infrastructure targeting this specific type of tourism, to increase tourist flows as well as alternative forms of tourism.</li> <li>◆ Working on a comprehensive plan for developing general aviation airports, which are small airports that can host a sophisticated infrastructure to host Lear jets.</li> </ul>
Hungary	<p>The state administration of tourism, the Ministry of Local Government (MoLG) attaches great importance to the utilization of EU funds eligible for tourism development in order to improve the attractiveness of the tourism supply of Hungary and make it more competitive. The MoLG promotes investment initiatives in the field of tourism by elaborating and implementing investment promotion programmes (conferences, brochures, providing assistance).</p> <p>The Hungarian National Tourist Office, Magyar Turizmus (MT), elaborated its new marketing strategy (2009-2011) and marketing plan (for 2009) with consideration of the impacts of the financial and economic crisis. Based on these considerations the HNTO continuously analyzes the demand of domestic and foreign tourists as well as travel habits and monitors the trends in tourism statistics. HNTO will focus its activities on the domestic market and on the neighboring countries and short-haul destinations.</p>
Israel	<p>Despite the economic crisis Israel will keep developing marketing campaigns around the globe and reinforcing campaigns in specific markets. It will study the necessity of making adjustments in tourism messages and in target audiences, focusing on maintaining the existing marketing channels. Consequently, two promotional campaigns have been launched to target tourists from France and the USA.</p> <p>In this respect, in May 2009 the Tourism Ministry launched a NIS\$ 3 million (US\$ 800 thousand) campaign in France aimed at increasing the number of French tourists to the country. Also in July 2009, the government launched a multi-year campaign to encourage travel of Jewish and non-Jewish persons from USA to Israel. For this purpose, a NIS\$ 38 million (US\$ 10 million) budget was assigned to increase activities and partnerships with Jewish organizations, as well as joint efforts with other Israeli government ministries.</p> <p>As for human resources policy, Israel has decided to help companies maintain employment and avoid firing professionals from the tourism industry in order to be able to react properly in times of recovery. On the other hand, the country is making additional efforts for tourism facilitation. For instance, on July 2009, the Prime Minister of Israel announced the cancellation of plans to impose a 16.5% VAT on the purchase of foreign tourist services in Israel, proposed by the Treasury as part of the Economic Law of Arrangements. He had also agreed to waive the addition of VAT on fruit and vegetables.</p>

	<p>Moreover, after the experience of a bilateral agreement signed between Israel and Russia by which visa requirements for both Israeli and Russian tourists have been cancelled, Israel is currently considering the possibility of signing a similar visa-free agreement with Ukraine.</p>
Italy	<p>Response measures by the Italian Government are as follows:</p> <ul style="list-style-type: none"> <li>◆ Social help to lower income families: this measure envisages special discounts for holidays in Italy during the low and mid season, so as to help families going on holidays and, at the same time, keep the hotel industry working in the off-peak season.</li> <li>◆ Marketing partnership with France and Spain: this partnership involves co-marketing operations aimed at building common travel products and attracting, as a unique destination, tourists from emerging and long haul markets.</li> <li>◆ The Government has negotiated with five major Italian banks terms of access to credit facilities, up to a total amount of 1.6 billion Euros, for SMEs operating in the tourism sector.</li> </ul>
Netherlands	<p>The government wants the Dutch aviation industry to become more competitive by becoming more sustainable. This means cutting costs and being innovative. Thus, as part of the economic stimulus, the government has taken the decision to abolish the recently introduced departure tax, which added a cost of between € 11 to € 45 for each passenger departing from Dutch airports for flights within and outside Europe. Additionally the aviation industry has also undertaken to cost cuts. For instance, KLM has decided that effective immediately it will stop charging the tax to its passengers: The tax will no longer apply on flights leaving from 1 July 2009. Passengers who have already purchased a KLM ticket that departs on or after this date will be refunded their ticket tax without being charged any administrative costs.</p> <p>Regarding sustainability, the government will stimulate measures to limit nuisance and quieter, cleaner flights. The Netherlands is already known in sustainable aviation thanks to its fuel policy and on-board weight reduction measures. Additionally, it will collaborate with industry players to launch a knowledge and innovation agenda in summer 2009, with the aim of making Schiphol the world's first climate-neutral airport by 2040, both on the ground and in the air.</p> <p>On the other hand, the Netherlands is strengthening advertising efforts. For instance: the <i>cityzapping</i> campaign launched by the Netherland Board of Tourism &amp; Conventions (NBTC) to promote the country as a multiple city destination, considering the short distance between the cities and train transport offer; and previous examples of NBTC collaboration with Expedia to launch a large-scale and ground-breaking online marketing campaign to highlight that Holland offers great value for money and great vacations as well, and the joint promotion with the Amsterdam Tourism &amp; Conventions Board (ATCB), offering a total of 1.001 free hotel nights to tourists for sprint time booking.</p>
Norway	<p>No measures specifically aimed at the tourism sector have been undertaken in Norway. However the Norwegian Government has presented a general stimulus package consisting of some fiscal and monetary policy as well as some stimulus oriented to carry on investment in infrastructure. The Norwegian general stimulus package includes:</p> <ul style="list-style-type: none"> <li>◆ Change of tax regulations to improve the liquidity of industrial companies;</li> <li>◆ Increased municipal budgets to make it possible to renovate and build new schools, nursing homes and churches, etc;</li> <li>◆ Increased communications budget to undertake maintenance and investments in railways, roads and harbours nationwide;</li> <li>◆ Establishment of a Norwegian State Finance Fund to strengthen the banks' core capital;</li> <li>◆ Establishment of a Norwegian State Bond Fund Norway's central bank has also repeatedly reduced the interest rate.</li> </ul>

<p>Portugal</p>	<p>To deal with the potential impact of the current economic downturn on tourism, Portugal has developed specific measures for the tourism sector such as:</p> <ul style="list-style-type: none"> <li>◆ Hard selling campaigns with tour operators and airlines from the traditional main markets;</li> <li>◆ Domestic tourism advertisement campaign;</li> <li>◆ € 500 million credit line in benefit of tourism industry;</li> <li>◆ € 50 million credit line in benefit of restaurants.</li> </ul>
<p>Slovakia</p>	<p>The Ministry of Economy of the Slovak Republic established the Monitoring Committee of Global Crisis Impacts on Entrepreneurs, whose main task is to monitor the current situation and the impacts of the financial and economic crisis on small and medium-sized enterprises; particularly, in the field of employment, effectiveness of management, sales possibilities and export capability. The committee is intended to propose and recommend specific measures to minimize the possible negative effects.</p> <p>Subsequently, in January 2009, the Government set up the Council for Economic Crisis, with the task to alleviate the impacts of the global economic crisis. Additionally, in order to suggest and adopt effective measures, the Ministry of Economy, together with the Slovak Tourist Board, are monitoring the situation in the tourism sector and collecting information from relevant subjects. For example, self-governing regions, tourism associations and entrepreneurs in the field of tourism.</p> <p>On the other hand, the package of measures approved by the Slovak Government in February 2009 comprises a territorial limitation for holiday stays exclusively on the national territory to the public force organs and pensioners paid with the state's budget. By this measure the government aims to support domestic tourism thanks to a better use of existing capacities and to increase domestic consumption.</p> <p>The Government of the Slovak Republic also intends to introduce a system of holiday checks in Slovakia as an important tool of supporting domestic tourism in accordance with the New Tourism Development Strategy and the State Tourism Policy of the Slovak Republic, adopted in 2007. The aim of this measure is to stimulate domestic tourism demand, make tourism more accessible to domestic population, increase the participation of domestic people in tourism activities and enhance the occupancy rate in Slovak accommodation facilities. However, some issues relating to the taxation of these checks still have to be addressed.</p>
<p>Slovenia</p>	<p>The measures adopted by Slovenia specifically for the tourism industry are mainly marketing oriented. Firstly, the Government has earmarked an additional budget of €1.5 million for joint marketing communication campaigns for the tourism industry and local/regional partners, with up to 60% of the amount financed by the Ministry of Economy. Moreover, further marketing activities have been focused on the domestic market, and more information about the crisis influences has been prepared for those involved directly or indirectly in the tourism sector. However, priority measures to tackle the economic crisis focus on strengthening bank liquidity to reinforce the business' access to investment funds for development projects, which will also benefit the tourism sector.</p> <ul style="list-style-type: none"> <li>◆ Strengthening the investment cycle for the development of tourism infrastructure within the framework of the promotion of tourism entrepreneurship and competitiveness. This includes: <ul style="list-style-type: none"> <li>- Further support for small and medium-sized enterprises;</li> <li>- Investment in public tourism infrastructure;</li> <li>- Support for the development of sustainable management in tourism companies and destinations;</li> <li>- Promotion by increasing the quality of tourism products and services;</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>- Promotion of innovation;</li> <li>- Development of human resources to meet the needs of the tourism sector;</li> <li>- Support for the preservation and implementation of sustainable development in tourism (balanced and harmonized structural policies and implementation of measures to increase competitiveness in Slovenian tourism).</li> </ul> <p>◆ Strengthening activities related to promotion and marketing. The Slovenian Tourist Board is working in close cooperation with the tourism industry to:</p> <ul style="list-style-type: none"> <li>- Organize more marketing communication campaigns (co-financed by the tourism industry) in traditional markets, particularly in neighboring countries and in markets less affected by the crisis;</li> <li>- Organize more expert meetings, educational workshops and study trips for the purpose of improving professionalism and the knowledge needed for the planning, design, management and marketing of tourism services;</li> <li>- Provide further training in tourism destination management;</li> <li>- Set up an incubator network with the aim of promoting innovation in tourism;</li> <li>- Launch additional advertising campaigns intended for the general public in domestic and foreign mass media;</li> <li>- Intensify public relations activities (additional study trips for journalists);</li> <li>- Strengthen the thematic consumer campaign <i>Taste Slovenia</i> in the short and medium haul markets;</li> <li>- Take a more active approach in the development of new air routes in cooperation with the national airline;</li> <li>- Intensify the promotion in the domestic market within the framework of the campaign <i>home sweet home</i> taking advantage of the trend of increased holiday-making by Slovenes in their own country;</li> <li>- Strengthen e-marketing and website advertising in the domestic and neighboring markets;</li> <li>- Strengthen the monitoring of the market and the provision of information to key stakeholders on overall developments in tourism in Slovenia, and at the European and international level (EC, UNWTO, ETC, OECD).</li> </ul> <p>Additional actions have been implemented in the fields of the labor market, lifelong learning and social security; infrastructure, energy and environment for sustainable development; and improvement of the benefits from the Cohesion Funds, which will also benefit the tourism sector.</p>
Spain	<p>The State Secretariat for Tourism of Spain has made available a financial help of € 1.000 million under the <i>Plan Renove</i> (Plan Renew), in order to finance investments to renovate tourism infrastructures in the country. In addition, the Secretariat is offering € 2 million on direct subsidies through the Support Programme for Innovating Companies in the tourist sector, to companies that present plans for innovation aimed at improving their competitiveness.</p> <p>The <i>Plan Renove</i> is part of the Spanish stimulus programme for economy and employment recovery, known as <i>Plan E</i>, which includes all the measures taken by the Government to sustain economic activity and to lay the foundations for sustainable growth in the future. Through it the Spanish government aims to promote the rehabilitation of tourism facilities, adding value and therefore improving the quality and the sustainability of the tourism infrastructure.</p> <p>Tourism accommodations units and travel agencies are obtaining credits for the renovation and modernization of their infrastructures (at an interest rate well below the open market). The first leg of the plan, offering € 400 million, financed 1.000 projects, entailing a final investment of € 800 million. Furthermore, the <i>Plan E</i> is meant to benefit other sectors such as construction and ancillary industries, by creating jobs and boosting the multiplier effect of tourism. In the medium term, it is expected to improve the country's attractiveness,</p>

	<p>promote sustainability and an efficient use of energy, help environment preservation, favor the introduction of new technologies and improve management and marketing.</p> <p>Additionally, through the Support Programme for Innovating Companies in the tourism sector, the State Secretariat for Tourism is offering €2 million for direct subsidies to companies that present plans for innovation aimed at the improvement of their competitiveness. The aim of this programme is to encourage competitiveness through innovation, also in times of economic downturn.</p>
Tajikistan	<p>The Ministry of Foreign Affairs of Tajikistan has simplified visa application process whilst the Ministry of Internal Affairs has approved an extension of stay for tourists without registration. Moreover, some taxes applied to tourists where abolished, for instance, those related to accommodation and to the use of nature.</p>
Turkey	<p>Turkey's Ministry of Culture and Tourism is collaborating with the private sector to overcome the impact of the current crisis on tourism. Activities include co-advertising campaigns, on-line campaigns, familiarization tours, workshops and road shows in the country's main source markets.</p> <p>Still, the Ministry of Culture and Tourism of Turkey is confident in the strength of domestic and short-haul tourism. Thus, the government is taking measures such as holiday credits and discounts on early booking for domestic tourism and enhancing cooperation with neighboring countries with common cultural tights, like for instance, the Balkans and Middle East countries on the Caucasus. Additionally, the Ministry stresses on Turkey's experience on all inclusive products and its high quality-price ratio. Moreover, the Ministry is analyzing a variety of stimulus to develop Turkish tourism sector as follows:</p> <ul style="list-style-type: none"> <li>◆ Tax concession</li> <li>◆ Incentives renovation</li> <li>◆ Employment facilitation</li> </ul>

## MIDDLE EAST

Egypt	<p>Egypt's strategy for overcoming the global economic crisis includes strengthening partnerships with scheduled airlines, joint marketing initiatives with trade, systematic gathering and analysis of feeder market intelligence and encouraging industry to value-add rather than decrease prices.</p> <p>As over 85% of travel to the country is generated by air, the Ministry of Tourism is proactively working to strengthen its alliance with the airline industry. The key measures being taken are:</p> <ul style="list-style-type: none"> <li>◆ Introduction of a new formula for take-off and landing fees for new operators and encouraging the reduction of those fees for existing operators to and from all airports in Egypt;</li> <li>◆ Strengthening partnerships with scheduled airlines from all our source markets so that they maintain their load capacities to Egypt;</li> <li>◆ Working on marketing campaigns with the airlines – by advertising in their in-flight magazines, and providing them with material for their in-flight entertainment programs;</li> <li>◆ Supporting incentive programme for charter flights and low cost carriers operating to all airports in main tourist destinations that are currently operating below full capacity</li> </ul> <p>Further, the Ministry is systematically gathering and analyzing market intelligence and aggressively pursuing its key tourism markets by reaching out to them in person. It is also strengthening ties with its partners in the tourism trade and intensifying joint (co-marketing) activities as well as increasing its global promotional budgets.</p> <p>Developing a tactical and segmented approach rather than a generic approach to marketing and conducting roundtable discussions with Egypt's private sector to assess impact and determine appropriate actions are other measures being taken by the Egyptian Ministry during the crisis. The Ministry is proactively encouraging the industry to use alternative promotional tools and value-added packages to appeal to consumers on tighter budgets, instead of slashing prices. It is taking stock of the industry's internal strengths and weaknesses, and focusing on training, skills, and human resource development within the tourism sector. It has also announced that it will withhold all additional new taxes that affect the decision to travel. Negotiations with the banking sector are also being held to enable debt re-scheduling and loan facilitation for serious tourism investors and businesses in need of a helping hand.</p>
Jordan	<p>In Jordan, the government has approved a number of measures to boost tourism in the Kingdom, including a drop in Royal Jordanian ticket prices and a reduction on hotel rate sales tax from 14% to 8%. The new measures also include streamlining entry procedures for citizens from India, China, and Romania.</p> <p>In the area of marketing, the Jordan Tourist Board (JTB) was instrumental in bringing tour operators and agency representatives from the USA, Canada and South America to the first Jordan Travel Mart early 2009 in an effort to increase tourist traffic from these markets, particularly from Brazil, Chile and Argentina that are growing markets. Jordan hopes to lure more Latin American tourists with the unveiling of a new marketing campaign later in 2009. The cross-media effort will put a strong emphasis on e-marketing. The JTB has been at the forefront of promoting the country's main attractions, diverse tourism products and appeal as a year-round holiday destination, and the authority has now honed its approach to target tourists with specific tastes. In addition to the South American</p>

	<p>market, the JTB is looking at expanding its geographical representation to include China and India. It has recently launched two websites targeting tourists from China and Hong Kong (China).</p>
<p>Oman</p>	<p>The Ministry of Tourism of Oman has launched its largest ever marketing campaign in the Gulf Cooperation Council (GCC) countries on February 22, 2009 under the banner <i>Partnership Oman</i>. Running for 4 months, the campaign is a joint initiative by the Ministry of Tourism, Oman Air and is supported by Oman's major hotels and resorts. The GCC is Oman's largest tourism market and has seen significant growth in visitor arrivals by both air and road in recent years. The Ministry will also specifically develop the Saudi Arabia market which is seen to have untapped potential.</p> <p>As part of the campaign, the Ministry of Tourism, Oman Air, and major hotels are running trade briefings in all GCC markets. Various promotion activities at major shopping malls across AGCC countries have been initiated to reach out to discerning travelers. At key malls across the GCC, customers will be able to watch video presentations about Oman as a unique tourist destination as well as pick up literature about Oman's Short Breaks. The campaign coincides with the Oman Air's ongoing expansion aimed at boosting connectivity. By the end of March 2009, Oman Air will operate around 120 services per week to GCC city gateways, a vast improvement its current schedules.</p>
<p>Qatar</p>	<p>Qatar is supporting investment on tourism infrastructure and the development of sustainable events. Qatar's Tourism and Exhibitions Authority has recently launched a new strategy to grow the tourism industry in Qatar by 20% in the next five years. The goal is to develop an upscale destination reputed for quality and excellence, by guiding the development of sustainable events and supporting infrastructure. The State is making a total investment of US\$ 17 billion over the next five years on tourism infrastructure, including the construction of luxury hotels, resorts and other leisure facilities.</p>
<p>Saudi Arabia</p>	<p>In Saudi Arabia, the government has massively stepped up its role in supporting its hospitality and tourism sector, with a new national tourism plan set to be published this year. The Saudi Finance Ministry prioritized the promotion of tourism in the 2009 budget, boosting its allocation by 11% to SR385 million (US\$ 102 million), following a 56% raise to SR347 million (US\$ 93 million) in 2008.</p> <p>Further, the Saudi government has approved bank financing to process loans to fund heritage projects for small and medium size enterprises.</p> <p>In May 2009, the Arab Tourism Ministers attended a meeting in Yemen, where they discussed plans of action for promoting tourism among Arab countries. They also discussed a proposal to issue a unified visa for foreign tourists wishing to visit any of the Arab states, similar to the Schengen visa in Europe. According to the Prince Sultan bin Salman, Chairman of the Saudi Commission for Tourism and Antiquities (SCTA), there is a need to promote inter-Arab tourism and achieve tourism integration as a step toward the economic integration of Arab states.</p> <p>On the other hand, the SCTA is focusing its efforts towards domestic tourism. Their main objective is to be able to provide domestic tourist with the same international standards of tourism services and prices consistent with such levels of service. Accordingly, some measures have been proposed by the SCTA to boost jobs in the sector. First, the Commission is looking to establish tourism professional associations to take responsibility of developing human resources. Second, the creation of a committee for supervising the <i>On-Job training programme</i>, in collaboration with the Human Resources Development Fund and the Ministry of Labor for Labor Affairs.</p>

	This programme aims to hire qualified job seekers for a training period in order to alleviate the job market.
Syrian Arab Republic	<p>Syria is taking three main measures to overcome the economic crises:</p> <ul style="list-style-type: none"> <li>◆ Easing entry visa restrictions to Iraqi tourists: Damascus is easing entry visa restrictions to Iraqi tourists after 17 months of strict regulations. The Syrian Immigration Department's new regulations require tourists to be part of a group and enter the country only through Damascus International Airport. Further, tourists should have a return ticket, at least SYP\$ 1,000 in cash and should leave their passports at the tourist office after arrival.</li> <li>◆ Increasing flights by the national carriers to attract more regional tourists: in a bid to attract more regional tourists, Syrian Arab Airline has increased flights to the Arabian Gulf to Dubai, Abu Dhabi, Sharjah and Doha</li> <li>◆ Improved destination marketing and promotion of the destination: the Ministry of Tourism, along with Syrian Airlines, is also participating in a number of tourism fairs and exhibitions in Europe as part of its marketing and promotion campaign for Syria.</li> </ul>