

# HDC

Hotel & Destination Consulting

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## **A Roadmap for Competitive Development of Ukrainian Travel & Tourism Industry**

### **Strategic Workshop**

October 16, 2019

# Agenda

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<b>09:30h</b>	<b>Workshop start / Introduction</b>
<b>10:00h</b>	<b>Analytical Findings and Procedures</b>
<b>11:00h</b>	<b>Strategy Framework</b>
<i>11:25h</i>	<i>Coffee Break</i>
<b>11:40h</b>	<b>First phase of strategy framework and measures</b>
<i>13:00h</i>	<i>Lunch Break / Finger Food</i>
<b>13:30h</b>	<b>Second phase of strategy framework and measures</b>
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<b>15:15h</b>	<b>Third and fourth phase of strategy framework and measures</b>
<b>16:00h</b>	<b>Wrap up</b>

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# Slot 1

## Workshop start / Introduction

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- Workshop welcome notes / EBRD motivation and objectives
- Introduction to the project / tasks and procedures



9:30 – 10:00



Denis Torkhov, EBRD  
Zoran Kasum, HDC

## EBRD introduction

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EBRD has initiated “A Roadmap for Competitive Development of Ukrainian Travel & Tourism Industry” project that consists of:

- independent and professional assessment of Ukrainian tourism system;
- set of recommendations for increasing its competitiveness, identification of strategic priorities and set of priority actions;
- identification of financing opportunities aimed at SMEs that are in accordance with strategic priorities.

This paper is intended to structure further dialog between industry players, government, international institutions and other stakeholders, and to provide a meaningful framework for future development of tourism and HoReCa (Hotels, Restaurants and Cafes), as well as other tourism related SMEs in Ukraine.

# Tasks and procedures

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- Analysis of the existing Tourism Development Strategy for Ukraine;
- Analysis of Ukrainian Law on Tourism;
- Stakeholder interviewing process including:
  - 55+ personal interviews with the leading stakeholders of Ukrainian tourism;
  - 20+ telephone interviews;
  - 30+ mail inquires and semi-structured interviews.
- Site inspection of the key tourist sites in Kyiv, Odesa and Lviv;
- **Analysis of the general situation** in Ukraine
- **Analysis of the economy and taxation system** based on secondary data;
- **Assessment of Ukrainian general competitiveness** based on consultants' observations and analysis of secondary data (competitiveness related reports by international institutions);
- **Analysis of the Ukrainian tourism market** with additional emphasis on the key destinations based on the available statistical data (National Statistics, Destination development departments of Kyiv, Odesa and Lviv);
- **Analysis of the Ukrainian tourism management and marketing system**, outlining the key regulatory foundations, processes and communications and their comparisons to international best practices;
- **Evaluation of the tourism economy** of Ukraine based on official statistics estimates from the various international sources, related pilot projects conducted in Ukraine and expert opinions;

## Tasks and procedures

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- Where applicable, HDC has applied comparisons of Ukrainian situation, tourism and economy with the following countries based on similar size, historical development or tourism product:
  - Best tourism performers: France (similar size), Germany (similar size and product), Canada (potential product similarities, large country with relatively small population);
  - Potential competitors: Poland (similar size, similar tourism product, historically related) Romania (comparable size, partly similar product), Bulgaria (made a substantial tourism development cycle over the last 30 years);
- Evaluation of the hotel industry performance based on the official statistics and data gathered through the interviews with hotel industry stakeholders;
- Evaluation of the Ukrainian tourism value chain according to a tailor-made adoption of the original model, where the model has been evaluated by four experts of the consortium together with additional 12 evaluators that have been selected from the interviewed stakeholders;
- Evaluation of the tourist products of Ukraine, according to an HDC tailor-made product evaluation model;

**Based on the all above analysis deducted proposal of high-level guidelines as a platform of discussion with stakeholders**

# Goals and Expectations

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## Goal of the workshop

**To involve top level professionals in tourism sector in Ukraine in order to come up with the consolidated version of the National Roadmap for Competitive Tourism Industry**

## Expectations from the workshop

- ✓ **to verify main findings**
- ✓ **to check the solutions are appropriate, and**
- ✓ **to provide feedback on the proposed specific measures**

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# Slot 2

## Analytical Findings

- 
- Overview of findings & Conclusions (45 min)
  - Reflections and opinions (15 min)



10:00 – 11:00



**Branko Bogunović, HDC**  
**Zoran Kasum, HDC**

# Ukraine is a spacious Eastern European country



...historically embracing both Eastern and Western influences

...highly centralised with sometimes unclear divisions of jurisdictions between government levels

...with unstable and volatile economic growth since its independence

...fairly attractive, but unexplored since tourism never became priority

...and with underdeveloped transport infrastructure hampering development

## Economy is finally set for a stable growth



Source: National Statistics of Ukraine, World Bank, EBRD

...Agriculture very significant (12% of GDP), but volume oriented

...IT is one of the most competitive sectors

...Banking sector is weak, while commercial lawns are inaccessible for most

...Most SMEs operate under flat taxation opportunities

Ukrainian economy is characterized by the large share of state-owned enterprises, moderate inflation, volatile historic performance and issues with corruption and law enforcement

# Ukrainian competitiveness is improving

General competitiveness  
rank: 85<sup>th</sup> (2019) ↓2

*World Economic Forum*

**KEY ISSUES:**

Institutions

Macro economic stability

Financial stability

T&T competitiveness  
rank: 78<sup>th</sup> (2019) ↑7

*World Economic Forum*

**KEY ISSUES:**

Safety and security

Environmental sustainability

Treatment of natural  
resources

Doing business rank: 71<sup>st</sup>  
(2019) ↑5

*World Bank*

**KEY ISSUES:**

Resolving insolvency

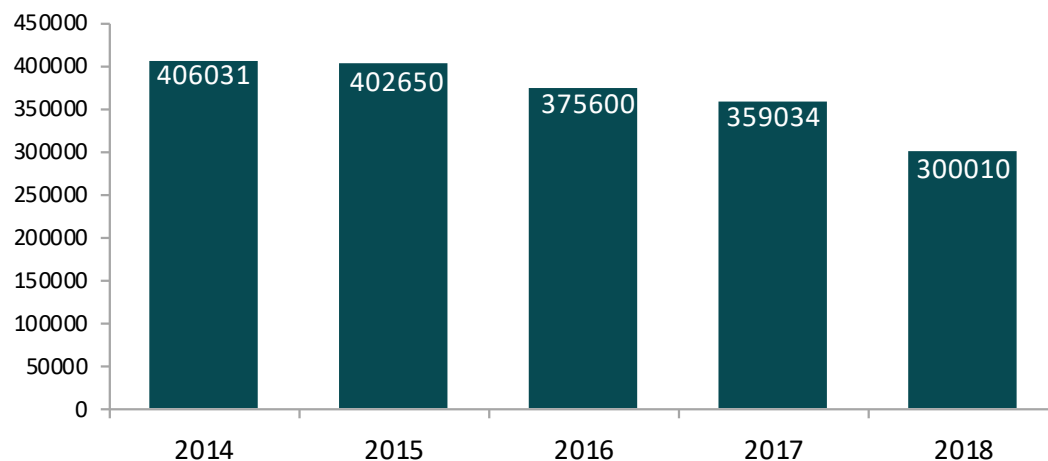
Getting electricity

Trading across borders

The main remaining issues are related to governance and organisation of the country, law enforcement, financial system and structure of the economy (high proportion of SOE's)

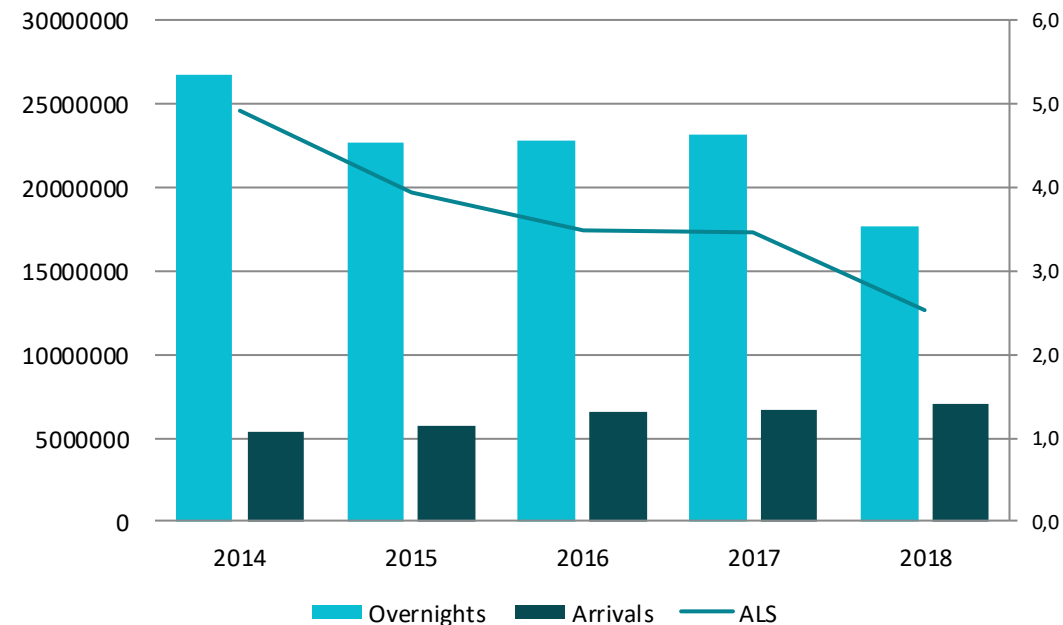
# Tourism in Ukraine is stagnating

Ukraine - number of beds in period 2014 - 2018



Source: State statistics service of Ukraine – data on accommodation objects

Ukraine- tourism traffic in period 2014-2018



However, its statistical coverage doesn't allow for any sensible analysis and decision making

## Economic effects of tourism are highly disputed

Estimation of economic impact of Ukrainian tourism for 2015			
	in thousands UAH	in thousands USD	% share
Accommodation	48.731.214	2.215.055	27.7%
Catering	8.969.952	407.725	5.1%
Transport	47.780.022	2.171.819	27.2%
Railway	4.289.432	194.974	2.4%
Road	6.023.363	273.789	3.4%
Water	0	0	0.0%
Air	37.467.227	1.703.056	21.3%
Vehicles rental	10.820.352	491.834	6.1%
Tourism agents / intermediation	11.233.065	510.594	6.4%
Culture	16.808.666	764.030	9.6%
Sport and recreation	11.844.716	538.396	6.7%
Retail	n/a	n/a	n/a
Activities	n/a	n/a	n/a
Other consumer products	19.792.684	899.667	11.2%
<b>TOTAL</b>	<b>175.980.671</b>	<b>7.999.121</b>	<b>100%</b>

*Institute of tourism, FPU*

Pilot TSA from 2015 has not been accepted as valid, official data (direct effects) are less than 50% of TSA

# International comparison of tourism related indicators

International comparison of tourism related indicators with selected set of countries						
	beds / population	airport passengers / population	international tourists	international receipts (US \$ billions)	share of tourism in GDP (direct)	T&T competitiveness rank
<b>Global leaders</b>						
France	0,077	2,96	86.917.700	60,7	3,9%	2nd
Germany	0,041	2,97	37.451.500	39,8	3,5%	3rd
Canada	0,053	2,70	20.794.100	20,3	2,0%	9th
<b>Potential competitors</b>						
Poland	0,020	1,19	18.258.000	12,8	1,9%	42nd
Romania	0,017	0,94	2.760.100	2,5	1,5%	56th
Bulgaria	0,050	1,81	8.883.000	4,0	3,1%	45th
Russian Federation	0,011	1,39	24.390.000	8,9	1,2%	39th
<b>Ukraine</b>	<b>0,007</b>	<b>0,48</b>	<b>14.229.600</b>	<b>1,3</b>	<b>1,4%</b>	<b>78th</b>

Ukraine is behind by nearly all relevant parameters

# Tourism management system in Ukraine



...Vertically aligned following the overall organisation of the State

...Lacking financial and management capacity, especially on the Central level

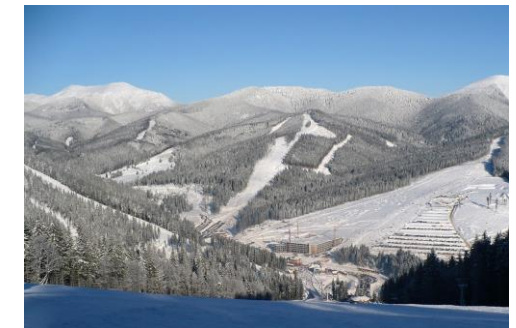
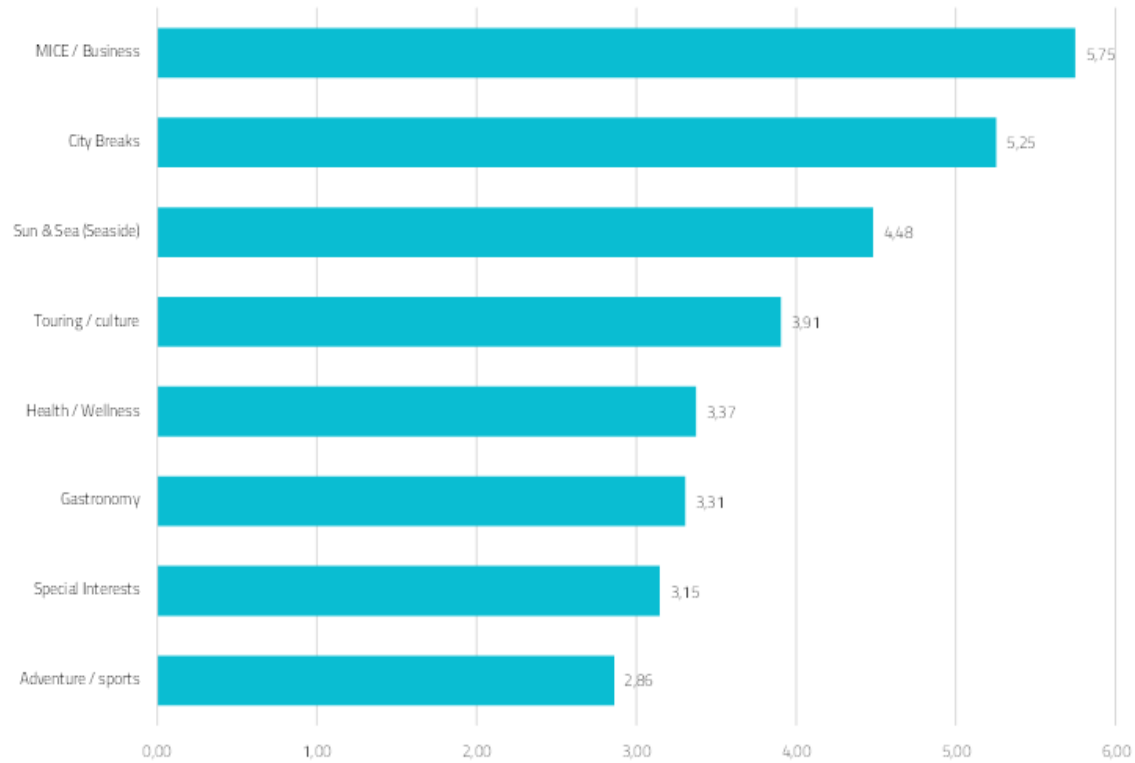
...Regulatory framework needs improvement, but law enforcement is even larger issue

...Inclusion of private sector is only consultative

...There are some good practices corresponding to international benchmarks on destination levels

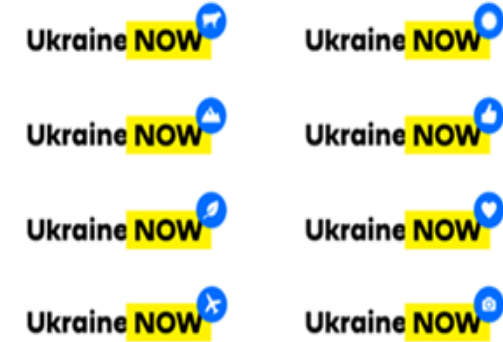
Ukrainian system of tourism management needs to enter process of realignment to contemporary international practices (NTO – RMO – DMO structure supported by the smart regulator)

# Products / destinations



City breaks and MICE are near international competitiveness, sun and beach needs some improvements, while touring / culture can be enabled in the short – mid term

# Ukrainian brand infrastructure



Regardless on the quality of creative ideas, brand infrastructure has never been completed, brand hasn't been adequately researched, internationally promoted or managed

# Tourism value chain analysis of Ukraine



...Tourism value chain is the internationally accepted model of tourism system evaluation (UNWTO)

...Evaluation has been performed by panel of Ukrainian tourism experts and project Consultants

Marketing (information and presentation), accessibility and tourism infrastructure are the weakest points in the chain

## Key issues (as confirmed by stakeholders)

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- **Tourism isn't perceived as an important sector** - organisation, regulation and law enforcement are neglected;
- **Tourism marketing is poor** due to the organisational solution (lack of human and financing capacity);
- Ukraine still suffers from the **poor international image** in terms of safety and security;
- The system of **statistical coverage of tourism** data doesn't provide enough information for planning and decision making;
- **Tourism taxation** is income wise treated as any other tax (i.e. it is not a separated budget inflow that is redirected back to tourism management or promotion);
- **Private sector in tourism** isn't formally included in tourism management (only minor consultative role);
- **Internal transport system** is identified as a bottleneck for developing any economic activity (i.e. prevents functional activation of the large portions of the territory).

Systemic and regulatory setup/buildup is the obligatory step for any further development

## Typical challenges of SME HoReCa

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- The biggest challenge SME HoReCa faces is lack of analysis of its data and a lack of effective organisation mostly it is focusing on daily operations only making the best of the existing situation instead of improving this.
- The reason SME HoReCa does not do so, is that it often lacks the understanding of the differentiation and correlation between Operations and Investment. A typical example of such discrepancy is “Fire & Safety” (NFPA 101 or SNIP).
- To overcome, SME HoReCa needs, at first, training and ongoing support to understand their hotels or restaurants as a business and to look beyond daily operational challenges, to also improve the long term value of their business.
- The EBRD Tourism Study focuses on a National macro economical approach. SME HoReCa must do the same, per hotel or restaurant based on a micro economical plan.
- EBRD helps SME HoReCa with implementation and training of Business Planning, Monitoring & Forecasting, based on USALI (Uniform System of Accounts 11<sup>th</sup> version).
- This starts, at first, with a PESTLE and SWOT, so that the actual and desired status can be mapped.
- SME HoReCa which implement and embrace such approach can identify areas for improvement, achieve quick wins such as an increase in cash flow and also qualify themselves as credible borrowers to lenders/banks or external investors so the hotels can grow their business.

## Business Advisory for SME HoReCa

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- EBRD provides sponsored International & Local Business Advisory to SME Horeca. The sponsor in most cases being the EU, sponsoring up to 90% of the advisory project cost.
- EBRD International Advisory is provided over 12-18 months, during which time an International Team of Advisors & Experts provides up to 50-60 days of Advisory delivered over 5-8 visits during which Training & Workshops are held.
- EBRD focus is on small mediums size privately owned Hotels & Restaurants and Resorts, both city hotels & holiday resorts and Eco Hotels (remote off the track rural hotels with a focus on experience tourism such as sports and agriculture).
- EBRD competence team includes Senior International Advisors & Experts in Online Marketing & Sales, MICE/Corporate & GDS Sales & Distribution, Business Planning, HR Management including Recruitment, GDPR (Data Privacy Legislation), Fire & Safety, HACCP in the Kitchen, Spa Management, Profitable F&B Management, Development of Greenfield/Brownfield Hotels, and many other subjects.
- Further details: <https://www.gransier.com/ebrd-asb-ia-hospitality-advisory-consultancy-services/> (username and password is the same: EBRD)
- Click [here](#) (use password EBRD) to play a video testimonial of an EBRD Client in Chisinau, Moldova, which has increased its gross operating profit (Year on Year) over 90%, facilitated by means of an EBRD ASB IA Project.

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# Slot 3

## Strategy Framework

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- Strategy outline (15 mins)
- Reflections and opinions (10 mins)



11:00 – 11:25



**Branko Bogunović, HDC**  
**Zoran Kasum, HDC**

## Strategy Pre-conditions

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- Resolution of the conflict / peaceful solution
- Consequentially, credit ratings increase and decrease of inflation and interest rates
- GDP growth not lower than global average
- Tourism position within the Government placed among strategic sectors
- Global tourism without major turmoil or shocks

## **4 PHASES OF DEVELOPMENT MEASURES IN TOURISM**

# Strategy Outline

## FRAMEWORK SETUP (2020 - 2021)

- o **Establishment** of an internationally competitive system of **national tourism marketing** that can utilize identified quick wins;
- o Set-up **new legislative and organisation framework**;
- o **Initiate** long-term **capacity building** processes.

## AWARENESS BUILDING (2022 - 2025)

- o **Improvement** of international **tourism image**;
- o Promotion and commercialization of leading destinations with the **emphasis on MICE and City break** products;
- o **Creation of planning framework** and institutional preconditions for development of further tourism products and capital investments.

## CAPITAL INVESTMENT AND PRODUCT DEVELOPMENT (2026-2029)

- o **Capital investments** and intensive **product development**;
- o Construction of **major tourism and transport infrastructure**;
- o Fully operational **three level tourism organisation (national – regional - local)**.

## QUALITY ASSURANCE AND DIFFERENTIATION (2030-onwards)

- o Establish **quality management** framework and mechanisms;
- o State-of-the-art **brand management** and marketing practices;
- o Product **differentiation**.

# 30 measures in first two phases of tourism development



	FRAMEWORK SETUP (2020 - 2021)	AWARENESS BUILDING (2022 - 2025)
<b>Regulation</b>	<b>4</b>	<b>5</b>
<b>Accessibility</b>	<b>1</b>	<b>3</b>
<b>Branding</b>	<b>1</b>	<b>2</b>
<b>Marketing</b>	<b>4 (3)</b>	<b>3</b>
<b>Competitiveness</b>	<b>2</b>	<b>3</b>
<b>Investments &amp; General Business Conditions</b>	<b>1</b>	<b>1</b>

**Third and fourth phase have common measures but number and details of them is depending on the realisation of the first two phases**



11:25 – 11:40

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# Slot 4

## First phase of strategy framework and measures

- Proposal Outline (60 mins)
- Opinions and Reflections (20 mins)



11:40 – 13:00



Branko Bogunović, HDC  
Zoran Kasum, HDC



# M1 - Creation of National Tourism Organisation



## Measure description

- National Tourism Organisation – agency in charge of international promotion and brand management of Ukraine
- Usually in PPP ownership, frequently regulated by special law
- MOTIVATION: Key institutional step for the improvement of national marketing system

## Key Issues

- Management & ownership structuring
- Financing sources
- Phasing
- Recruitment



## Key steps

- Forming expert council – 1<sup>st</sup> quarter 2020
- Guidelines – 2<sup>nd</sup> quarter 2020
- Regulation on NTO – 3<sup>rd</sup> quarter 2020
- Adoption of the law regulation / formation of NTO – end of 2020

## EXAMPLES FROM THE WORLD

	Annual budget in mio. EUR (2017)	Foreign offices
Poland	12	14
Austria	53	20
Croatia	37	15

Source: Web pages of respective national tourism organisations / offices

- Co-ownership model is used in Austrian National Tourism Organisation - budget is made up of membership fees from the Federal Ministry of Science, Research and Economy (75 %) and the Austrian Federal Economic Chamber (25 %)
- Fixed quotas for private sector are used in Croatia - private sector tourism council members are chosen on 4 years by the Board and they are part of key decision making in the Croatian National Tourism Board (CNTB).

## In charge

Ministry of youth, culture and sport

# M2 - Reorganisation of tourism management in regional and local level



## Measure description

- Regional management organisations (RMOs) create and manage regional tourism competitiveness („Developer“)
- Destination management organisations (DMOs) handle tourists and operations („Operator“)
- Both are co-managed by private and public sector entities, financed directly by tourism taxes / membership fees / other contributions
- Usually follow administrative borders, but not necessarily
- Founded by decisions of regional/local stakeholders, overhead costs as % of total budget usually limited

## Key Issues

- Bottom up vs top-down approach
- Financing sources
- Division of functions
- Existing best practices / organisations should remain as intact as possible



## Key steps

- Forming expert council – 1<sup>st</sup> quarter 2020
- Guidelines – 2<sup>nd</sup> quarter 2020
- Regulation on NTO – 4<sup>th</sup> quarter 2020
- Adoption of the law regulation / formation of NTO – mid 2021

## EXAMPLES FROM THE WORLD

- Silesia tourism region (Poland / Czech Republic) - <http://www.silesiatourism.com/en/>
- Tuscany web page <https://www.visittuscany.com/en/>

## In charge

Ministry of youth, culture and sport

# M3 - Other tourism related legal adjustments



## Measure description

- Revision and enhancement of laws, bylaws and rulebooks regulating accommodation objects, intermediaries and other tourism related supply;
- The first phase of reorganization of tourism related statistics;
- Initiation of capacity building processes for the tourism management system;
- Revision of land regulation / tourism zoning;
- Introducing legally binding standards for tourism planning documents.

## Key Issues

- Timing of system setup
- Management capacity / labor intensity
- Stakeholder inclusion / management



## Key steps

- Organisation build up (Department of tourism within the Ministry) – 1<sup>st</sup> quarter 2020;
- Drafting of new laws, bylaws and rulebooks / standards of planning documents in tourism – 3<sup>rd</sup> quarter of 2020;
- Verification phase (public debate if mandatory) – 4<sup>th</sup> quarter of 2020;
- Adoption of new legislation – mid 2021.

## EXAMPLES FROM THE WORLD

- UNTWO tourism master plan guidelines: <https://cooperation.unwto.org/technical-product/tourism-development-master-plans-and-strategic-development-plans>
- Turkey tourism development strategy until 2023 <https://www.ktb.gov.tr/Eklenti/43537,turkeytourismstrategy2023pdf.pdf?0&tag1=796689BB12A540BE0672E65E48D10C07D6DAE291>

## In charge

Ministry of youth, culture and sport

# M4 - Enhancement program for MICE and City break products



## Measure description

- Formation of National Convention Office in charge of consolidating and packaging supply, establishing initial marketing and sales;
- Adaptation of the major city destinations that will be a target of the initial awareness building / marketing campaign – designation and decoration of the key zones, cycling/hiking tracks, tourism signalisation, facades, marketing infrastructure, city cards, extending events, destination management companies....

## Key Issues

- Deciding on / qualifying key destinations
- MICE convention supply structure / value chain
- Marketing infrastructure buildup



## Key steps

- Formation of National Convention Office (Ministry of youth, sport and culture) – 1<sup>st</sup> quarter 2020;
- Adaptation plans for city destinations – 2<sup>nd</sup> quarter of 2020;
- Adaptation of destinations - 2<sup>nd</sup> quarter 2021.

## EXAMPLES FROM THE WORLD

- German Convention Bureau  
<https://www.gcb.de/>
- Zagreb advent  
<http://www.adventzagreb.com/?lang=en>

## In charge

Ministry of youth, culture and sport / Tourism authorities in destinations

# M5 - Initial enhancement in transport accessibility



## Measure description

- Subsidizing air connections for the selected priority destinations – in order to support initial marketing push
- Standardisation / categorisation of taxi service for major destinations that will increase the feeling of convenience and safety for the guests
- Enhancing traffic accessibility and signage to the key points of interest within major destinations

## Key Issues

- Target markets (marketing plan)
- Controlling standards for digital transport platforms
- Deciding on attraction priorities for destinations



## Key steps

- Program of airline subsidies – (Ministry of infrastructure / State Aviation Service of Ukraine) – mid 2021;
- Standardisation / categorisation of taxi service for major destinations (city authorities in major destinations) – end of 2020;
- Enhancing traffic accessibility and signage to the key points of interest (city authorities in major destinations) - 1<sup>st</sup> quarter of 2021.

## EXAMPLES FROM THE WORLD

- Airport Improvement Programs (AIP) - <https://www.faa.gov/airports/aip/> - Federal program for enhancement of airports nationwide in USA
- Highway Improvement Programs - [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/461023/N150227\\_-\\_Highways\\_England\\_Planning\\_Document\\_FINAL-lo.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/461023/N150227_-_Highways_England_Planning_Document_FINAL-lo.pdf) - Highways England
- Taxi Improvement Programs - <https://cpv.vic.gov.au/about-us> - Commercial Passengers Services Victoria in Australia

## In charge

Ministry of infrastructure / State aviation service, city authorities in major destinations

# M6 - Development of Ukrainian tourism brand



**Measure description**

Finalising professional branding infrastructure for Ukraine:

- Drafting branding strategy – goals/tasks, research, positioning and communication strategy, branding brief
- Pitch for creative solutions and decision-making procedure
- Finalising creative solution and production of marketing materials

**Key Issues**

- Organisation setup / speed and quality
- Branding brief quality / goals
- Research / verification on phase and final solutions



**Key steps**

- Definition of the task group, budgeting and ToR – 1<sup>st</sup> quarter 2020;
- tender and contract award for Branding Strategy – 2<sup>nd</sup> quarter of 2020;
- Production of the Branding Strategy and Branding Brief – 4<sup>th</sup> quarter of 2020;
- Invitation for the creative agencies and contract award – 1<sup>st</sup> quarter of 2021;
- Production of the creative work, brand manual – mid of 2021.

**EXAMPLES FROM THE WORLD**

- Tourism Australia Brand Manual - <https://training.roomstovet.eu/images/docs/HR/Tourism-Australia-Brand-Guidelines.pdf>

**In charge**

Ministry of youth, sport and culture (or NTO)

# M7 - Operational / transitional marketing plan for 2021-2022



**Measure description**

Planning tool for the initial marketing efforts and campaign in 2021 and 2022:

- The mix of marketing actions to be executed per year and per market;
- Budget distribution and technical specification of the actions;
- Technical terms of reference for those actions susceptible of conducting a public tender and outsourcing;
- The road map of implementation and the metrics to measure performance.

**Key Issues**

- Determining market potential;
- Selection of targets;
- Channel selection and management.



**Key steps**

- Definition of the budgeting and ToR (within Ministry)– 1<sup>st</sup> quarter 2020;
- Tendering process and contract award – 2<sup>nd</sup> quarter of 2020;
- Production of the Operational (transition) marketing plan (and taking into consideration Branding strategy recommendations)– 4<sup>th</sup> quarter of 2020;

**EXAMPLES FROM THE WORLD**

**Contents**

1. Executive Summary.....	3
2. Introduction.....	9
3. Strategic Foundations – Summary .....	18
4. Outcomes, Investment and 2010/11 Position .....	22
5. Strategic Foundations - Detail .....	27
6. Market Plans .....	41
7. At a glance work programme .....	61
8. Scaling the plan to \$89m.....	63

**In charge**

Ministry of youth, sport and culture (or NTO)

# M8 - National tourist and road signalisation



## Measure description

- National Tourist (Brown) signalisation plan – standards, rules, priorities, jurisdictions, action plan;
- Implementation of the first phase of tourist and traffic signalisation in the key destinations - brown signalisation for all collective accommodation objects, road signs in English language in the central zones of key destinations, major public parking lots, including the information on payment machines and general conditions of parking.

## Key Issues

- Implementation jurisdictions;
- Coordination / standard maintenance;
- Smart model of integration of the existing signalisation.



## Key steps

- National tourism signalisation plan (Ministry of youth, sport and culture with the approval of Ministry of Infrastructure) – end of 2020;
- Implementation of the first phase of tourist signalisation and traffic signalisation in the key destinations (city authorities in major destinations) – mid 2021.

## EXAMPLES FROM THE WORLD



VisitScotland.org guidelines for tourism and road signalisation - <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/supporting-your-business/brown-signpost-guide-april2016.pdf>

## In charge

Ministry of youth, sport and infrastructure, Ministry of transport, city / regional authorities

# M9 - Plan for tourist information centres



## Measure description

Contemporary tourist information centers are today more than just providers of local destination information - they promote other nearby and nationwide attractions and points of interest, promote local identity /products, contain F&B outlets, exhibition places, etc.

The measure includes:

- Drafting concept and design standards for tourist information centers in Ukraine – major centers/ roadhouse / retreat, minor centers
- Completion / redesign of the first set of the existing tourist information centers

## Key Issues

- Determining market potential / needs
- Coordination with other measures (primarily branding)
- Digitalisation of supply



## Key steps

- Drafting concept and design standards (Ministry of youth, sport and culture via engagement of professional architects) – end of 2020;
- Completion / redesign of the existing tourist information centres (city authorities in major destinations) – 3<sup>rd</sup> quarter of 2021.

## EXAMPLES FROM THE WORLD



iSite New Zealand as benchmark for network of tourism information centres –

<https://www.tourismnewzealand.com/tools-for-your-business/i-site-new-zealand/>

## In charge

Ministry of youth, sport and infrastructure, Ministry of transport, city / regional authorities

# M10 - Creating financing opportunities for tourism related SME's



**Measure description**

Defining targets, terms and mechanisms and institutional setup that enable easier financing for tourism related (and other) SMEs:

- Drafting of the project teaser for the initial communication with potential donors. This action assumes previous analytics and cross-ministry harmonisations on priority targets in terms economic sectors and company profiles;
- Communications and negotiations with possible donor institutions and local commercial banks;
- Final packaging of credit lines and market launch.

**Key Issues**

- Institutional mechanism / transparency / credibility for donors
- Targets
- Terms and administration



**Key steps**

- Drafting of the project teaser for the initial communication with potential donors (Ministries of Finance, Economic and Trade, Youth, Culture and Sport) – mid 2020;
- Communications and negotiations (Ministries of Finance, other Ministries) – end of 2020;
- Final packaging of credit lines and market launch mid-2021.

**EXAMPLES FROM THE WORLD**

- Croatian Bank for Reconstruction and Development – special tourism lines for loans and investments - <https://www.hbor.hr/en/tema/tourism/>
- Croatian Agency for SMEs, Innovation and Investments established by the Government of the Republic of Croatia with the purpose of enhancing SME development and promoting investment and innovation - <http://www.investcroatia.hr/projects/>

**In charge**

Ministry of finance, ministry of economic development and trade,  
Ministry of youth, sport and culture

# M11- Product packaging for MICE and City break products



## Measure description

- Professional product development / packaging process for the products with the greatest competitive potential:
- Internal marketing and communication efforts/ Identifying all potential providers of goods and services and potential partners;
  - Negotiating terms and conditions of participation in product packages;
  - Creating thematic packages for city break products such as seasonal, romantic, city tour, gastro, fun & nightlife and similar;
  - Creating list of additional offers for MICE guests;
  - Translation, marketing materials, promo offers.

## Key Issues

- Team management and coordination
- Stakeholder inclusion / credibility
- Terms / product stability



## Key steps

- Forming teams for product packaging – 1<sup>st</sup> quarter 2020;
- Internal marketing and calls for participation – 2<sup>nd</sup> quarter of 2020;
- The initial round of negotiations and identifying interested parties - 4<sup>th</sup> quarter of 2020;
- Drafting product packages – 1<sup>st</sup> quarter of 2021;
- Production of marketing materials, finalising of the packages – 2<sup>nd</sup> quarter of 2021.

## In charge

National Convention office and city tourism departments in cooperation and under supervision of Ministry of youth, sport and culture and NTO

## EXAMPLES FROM THE WORLD

**Short breaks in England**

Strike out on long country walks through summer meadows and shady woods and stay over in classic English pubs to sample real ales and tasty regional grub. Plan an adventure with the kids in a canvas cottage or whisk your loved one away on a romantic city break. Discover a different side to an English seaside resort or cut your way around a foodie city, we have hundreds of ideas for short breaks in England.

**In this section**

- Family breaks and holidays
- Romantic breaks and getaways
- Countryside breaks
- City breaks and holidays
- Activity breaks and holidays
- Coastal and seaside breaks
- Foodie breaks and holidays
- Weekend breaks
- Bank holiday breaks
- Seasonal breaks
- Literary heroes
- English Gardens

Choose from hundreds of short break ideas...

**October events**

Find the best events, festivals and experiences in England this month – ideal for planning your short break. From huge music festivals to delicious seafood celebrations, England is the place to be this October.

Visit England packages on offer - <https://www.visitengland.com/short-breaks-england>

# M12 – Event support program



## Measure description

Program for supporting events in order to enhance destination attractiveness and customer experience starting with:

- Support for 5 major urban events with the main criteria in commercial appeal;
- Support for 10 minor events with the main criteria in internationally relevant innovation.

The above structure should be followed for 2021 and 2022, while the following support system should be adapted based on the results of previous supports and trends on the tourism market.

## Key Issues

- Ukrainian vs international perspective
- Transparency - managing pressures and bias
- Danger of fragmentation
- Long-term orientation



## Key steps

- Forming teams for product packaging – 1<sup>st</sup> quarter 2020;
- Internal marketing and calls for participation – 2<sup>nd</sup> quarter of 2020;
- The initial round of negotiations and identifying interested parties - 4<sup>th</sup> quarter of 2020;
- Drafting product packages – 1<sup>st</sup> quarter of 2021;
- Production of marketing materials, finalising of the packages – 2<sup>nd</sup> quarter of 2021.

## EXAMPLES FROM THE WORLD

Examples of some events started through support of public sector:

- EXIT festival, Serbia - <https://www.exitfest.org/en/>
- InMusic festival, Croatia - <https://www.inmusicfestival.com/en>
- Oktoberfest, Germany - <https://www.oktoberfest.de/en>
- Fringe Festival, Scotland - <https://www.edfringe.com/>

## In charge

Ministry of youth, sport and culture (donor and supervisor), city destination management departments (co-donors, project managers)

# M13 – Initial Marketing Campaign



## Measure description

Initial marketing campaign should be the first professional and organised step of promoting Ukraine as tourist destination with the following objectives:

- Create awareness that Ukraine is a tourism nation, with key destinations and positive values;
- Improve the image of the country in terms of safety and security;
- Establish relationships with major news cast, press, bloggers, influencers and the leading international online/offline tourism lifestyle magazines;
- Promote available products / packages of Ukrainian destinations aiming the increase of sales.

## Key Issues

- Own effort vs outsourcing
- Scope vs effect
- PR vs marketing
- Online vs offline



## Key steps

- Deciding on the budgets, production of PR and marketing brief – 1<sup>st</sup> quarter of 2021;
- PR and marketing agencies' pick – 2<sup>nd</sup> quarter of 2021;
- Start of campaign – 3<sup>rd</sup> quarter of 2021.

## EXAMPLES FROM THE WORLD

Some of the famous bloggers:  
 Dan Flying Solo - <https://www.danflyingsolo.com/>  
 A Broken Backpack - <https://abrokenbackpack.com>  
 A Lilli's Travel Plan - <https://www.lilistravelplans.com>  
 Advertorial in online travel magazine - <https://www.wanderlust.co.uk/discover/discover-canberra/content/canberra-on-the-rise/>  
 Advertorial in newspapers - <https://www.telegraph.co.uk/travel/destinations/north-america/canada/articles/why-you-should-visit-canada/>

## In charge

National tourism organisation, outsourced marketing and PR agencies

## Reflections and Opinions

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**We would like to hear your opinion on Phase 1  
and proposed measures**



13:00 – 13:30

# Agenda

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09:30h	Workshop start / Introduction
10:00h	Analytical Findings and Procedures
11:00h	Presentation of the Strategy
11:25h	<i>Coffee Break</i>
11:40h	First phase of strategy framework and measures
13:00h	<i>Lunch Break / Finger Food</i>
<b>13:30h</b>	<b>Second phase of strategy framework and measures</b>
15:00h	<i>Coffee Break</i>
15:15h	Third and Fourth phase of strategy framework and measures
16:00h	Wrap up

# Slot 5

## Second phase of strategy framework and measures

- Proposal Outline (60 mins)
- Opinions and Reflections (30 mins)



13:30 – 15:00



Branko Bogunović, HDC  
Zoran Kasum, HDC

# Second phase proposal outline

AWARENESS BUILDING  
(2022 - 2025)

NUMBER AND NAME OF THE MEASURE		CATEGORY	IMPLEMENTATION			
			2022	2023	2024	2025
<b>Long term development processes</b>						
14.	Second phase of tourism statistics adjustment	Regulation				
15.	Second phase of tourism system reorganisation	Regulation				
16.	Planning framework for the most attractive tourist attractions	Regulation				
17.	Education system adjustments	Regulation				
18.	Beach Management Program	Regulation				
19.	Second phase of tourism related transport development	Accessibility				
20.	National plan for development of biking and hiking infrastructure	Accessibility				
21.	Initiative for development of cruising product	Accessibility				
22.	Tourism Marketing Plan for Ukraine 2023 - 2027	Marketing				
23.	Marketing plans for the key destinations and regions	Marketing				
24.	Product packaging for Sun & Beach product	Marketing				
25.	Establishing longitudinal market research on brand of Ukraine and its destinations	Branding				
26.	Brand infrastructure for leading regions and destinations	Branding				
27.	Program of reconstruction / revitalization of city districts and smaller settlements	Competitiveness				
28.	"Ukrainian Premium" program	Competitiveness				
29.	National program for development of culture related tourism infrastructure	Competitiveness				
30.	Meeting and conference facilities planning	Investments and General business conditions				

Regulation

Accessibility

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M14. Second phase of tourism statistics adjustment

### Measure description

- Accommodation as the basis for all statistics (accommodation register)
- Pilot Tourism Satellite Account
- Attractions as the basis for covering day visitors

### Objectives

- Precise and exact accommodation-based statistics
- Clear division of overnight tourists / day visitors / other border crossings

### Responsibility

- State Statistics service of Ukraine
- Ministry of youth, culture and sport

### International practices

New Zealand Statistics – Tourism Satellite Account for 2018 - <https://www.stats.govt.nz/information-releases/tourism-satellite-account-2018>  
New Zealand Statistic Viewer - [http://nzdotstat.stats.govt.nz/wbos/Index.aspx?url=/tools\\_and\\_services/nzdotstat.aspx&gclid=CO\\_2jlemmL4CFUMQ7Aod1gcA\\_g](http://nzdotstat.stats.govt.nz/wbos/Index.aspx?url=/tools_and_services/nzdotstat.aspx&gclid=CO_2jlemmL4CFUMQ7Aod1gcA_g)

## M15. Second phase of tourism system reorganisation

### Measure description

- Formation of tourism chamber / other major association of private sector
- The first RMOs according to international practices
- The first DMOs according to international practices

### Objectives

- Unification / formalisation / coordination of private sector in tourism
- The first organisation run by joint private-public sector councils

### Responsibility

- Major private sector stakeholders
- Regional / local authorities
- Ministry of youth, culture and sport

### International practices

USA, Chamber of Commerce – travel & Tourism - <https://www.uschamber.com/travel-and-tourism>  
New Zealand Regional tourism System - <https://rtnz.org.nz/destinations1>  
Zagreb, Croatia tourism board - <http://www.infozagreb.hr/&lang=en>

Regulation

Accessibility

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M16. Planning framework for the most attractive tourist attractions

### Measure description

- Tourism Master plans for the selection of the most attractive destinations
- Coastal / mountain destinations, national parks, previously popular tourist destinations with outdated facilities
- Precondition – transport network in place or could be completed shortly

### Objectives

- Selection of the priority sites (2022)
- Tourism Master plans for the sites in place (2023)
- Investor search and project structuring (2024)
- Project preparation (2025).

### Responsibility

- Ministry of youth, sport and culture, external consultants

### International practices

Tourism Master Plan Kakadu National Park, Australia - <https://www.environment.gov.au/system/files/resources/67d35c60-4e1a-48f5-94aa-fa878e3acf28/files/tourismmasterplan.pdf>

## M17. Education system adjustments

### Measure description

- Preparation of Ukrainian education system and workforce for increased tourism activity;
- Increasing quotas, adjusting curriculums, requalification programs, lifetime education programs in tourism

### Objectives

- More workforce in tourism;
- Higher skills;
- Increased international cooperation and knowledge transfer.

### Responsibility

- Ministry of Education and Science
- Ministry of youth, sport and culture

### International practices

Cornell Hotel School typical curriculum - <https://sha.cornell.edu/admissions-programs/undergraduate/academics/degree-requirements/curriculum/>  
 Ecole hôtelière de Lausanne (EHL) MBA curriculum - <https://www.ehl.edu/en/programs/graduate-degree-programs/master-in-global-hospitality-business>  
 SDA Bocconi School of Management - <https://www.sdabocconi.it/en/home>

Regulation

Accessibility

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M18. Beach management programme

### Measure description

- Introducing international standards in beach management, design, environmental conservation, modernisation;
- New concession models and terms.

### Objectives

- Selection of the priority sites (2022) / Tourism Master plans for the sites in place (2023) / Investor search and project structuring (2024) / Project preparation (2025).

### Responsibility

- Enhancement of beach standard;
- Clear and competitive terms for entrepreneurs;
- Optimisation of economic effects.

### International practices

Montenegro, public company for coast management -  
<http://www.morskodobro.com/>

And they have recently developed national plan for beach management

EU Bucharest Convention on the Protection of the Black Sea -

[https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/index\\_en.htm](https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/index_en.htm)

as EU framework for beach management

Regulation

**Accessibility**

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M19. Second phase of tourism related transport development

### Measure description

- Connecting newly planned sites / destinations
- Introducing / enhancing airport hubs
- Widening phase 1 urban destinations

### Objectives

- Convenient solutions for transport of visitors to selected destinations
- 2-3 new airport projects
- Solutions for convenient transport of visitors for points of interest in 50km ring of the urban destinations

### Responsibility

- Ministry of transport
- Ministry of youth, culture and sport

### International practices

Newcastle airport Master plan -  
<https://www.newcastleairport.com/media/1289/new-master-plan.pdf>

Intermodal Passenger Transport in Europe - European forum on intermodal passenger travel [http://www.rupprecht-consult.eu/uploads/tx\\_rupprecht/LINK\\_Guidance\\_Brochure.pdf](http://www.rupprecht-consult.eu/uploads/tx_rupprecht/LINK_Guidance_Brochure.pdf)

## M20. National plan for development of biking and hiking infrastructure

### Measure description

- Hiking / biking are the most common and differentiated types of tourist activity
- Introducing planning framework for setting standards for building and equipping such infrastructure

### Objectives

- Types of trails, technical, safety and maintenance standards for trails on national level;
- Regional plans for priorities;
- First set of priority trails.

### Responsibility

- Ministry of youth, sport and culture;
- Ministry of transport;
- Regional and local authorities

### International practices

Germany, National Cycling Plan - <https://nationaler-radverkehrsplan.de/en/federal-initiatives/national-cycling-plan-nvp-2020>  
Finland, National Action Plan for Walking and Cycling -  
[https://julkaisut.vayla.fi/pdf3/Is\\_2012-02\\_summary\\_web.pdf](https://julkaisut.vayla.fi/pdf3/Is_2012-02_summary_web.pdf)  
United Kingdom National Cycling Routes -  
<https://www.sustrans.org.uk/national-cycle-network/>

Regulation

**Accessibility**

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M21. Second phase of tourism related transport development

### Measure description

- Ukraine has considerable coastline length and navigable rivers compared to cruising product
- Outline of the plan for development of cruising infrastructure.

### Objectives

- Drafting of national plan for development of cruising product (2023);
- Development kick-off for 3-5 thematic cruising routes (2024 – onwards).

### Responsibility

- Ministry of transport
- Ministry of youth, culture and sport
- Regional and local authorities

### International practices

Cruise Lines International Association (CLIA) – source for latest info on the markets and trends in cruising product - <https://cruising.org/>

New South Wales Cruise Development Plan -  
[https://www.industry.nsw.gov.au/\\_\\_data/assets/pdf\\_file/0020/169013/NSW-Cruise-Development-Plan.pdf](https://www.industry.nsw.gov.au/__data/assets/pdf_file/0020/169013/NSW-Cruise-Development-Plan.pdf)

Regulation

Accessibility

Branding

**Marketing**

Competitiveness

Investments and  
General Bus Cond

## M22. Tourism Marketing plan for Ukraine 2023 - 2027

### Measure description

- Planning framework for tourism marketing of Ukraine for the next period
- Enhanced existing products, new products, new markets, new channels

### Objectives

- Production of Strategic Marketing Plan for Tourism of Ukraine for the period 2023-2027
- Systematic approach to markets, products and market segments

### Responsibility

- National tourism organisation
- Other tourism related stakeholders

### International practices

Tourism Australia national promotion plan -  
<http://www.tourism.australia.com/content/dam/assets/document/1/6/z/e/w/2005448.pdf>

Tourism Malaysia Integrated Promotion Plan -  
[https://www.tourism.gov.my/pdf/uploads/activities/TM\\_PROMO\\_PLAN\\_2018-2020\\_FA.pdf](https://www.tourism.gov.my/pdf/uploads/activities/TM_PROMO_PLAN_2018-2020_FA.pdf)

## M23. Marketing plans for the key destinations and regions

### Measure description

- Tourism regions / destinations will start to emerge and strengthen
- Process of differentiation between markets and products will intensify

### Objectives

- Unification / formalisation / coordination of private sector in tourism
- The first organisation run by joint private-public sector councils

### Responsibility

- Marketing plans for the leading destinations – 2023;
- Marketing plans for the leading regions – 2025

### International practices

Melbourne City (Australia) marketing strategy -  
<https://www.melbourne.vic.gov.au/SiteCollectionDocuments/melbourne-city-marketing-strategy.pdf>

Visit California Marketing plan (USA) - <https://industry.visitcalifornia.com/-/media/industry-site/pdfs/publications/cttc-5-year-strategic-plan-final.pdf>

Regional Marketing Plan Lamark County (Canada) -  
<http://www.lanarkcounty.ca/AssetFactory.aspx?did=7549>

Regulation

Accessibility

Branding

**Marketing**

Competitiveness

Investments and  
General Bus Cond

## M24. Product packaging for sun and beach

### Measure description

- Product development process to be initiated after the first phase of beach management programme
- Identifying providers, marketing materials, packages, etc

### Objectives

- Push on domestic market by 2024
- First product packages (for new Sun & Beach product) on international market by 2026

### Responsibility

- Tourist departments / DMOs of coastal destinations
- Ministry of youth, culture and sport, tourism departments;

### International practices

TUI summer packages for Croatia in 2020 -  
<https://www.tui.com/ferienangebote/sommerferien/suchen/hotels/Kroatien/1022?useExtendedFilterDefaultValues=true&startDate=2020-06-22&endDate=2020-09-13>

Valamar Hotel Company(Croatia) Summer Deals 2020 -  
<https://www.valamar.com/en/holiday-deals-croatia>

Visit Tuscany Summer Ideas (What to do) -  
<https://www.visittuscany.com/en/ideas/10-things-to-do-at-the-beach-this-summer/>

Regulation

Accessibility

**Branding**

Marketing

Competitiveness

Investments and  
General Bus Cond

## M25. Establishing longitudinal market research on brand of Ukraine and its destinations

### Measure description

- Market surveys on target markets. This typically requires engagement of global market research company;
- Internet search of most frequently associated attributes with Ukraine and its destinations.

### Objectives

- Longitudinal brand research in place from 2023 as a basic tool for brand management

### Responsibility

- State Statistics service of Ukraine
- Ministry of youth, culture and sport

### International practices

New Zealand Statistics – Tourism Satellite Account for 2018 - <https://www.stats.govt.nz/information-releases/tourism-satellite-account-2018>

New Zealand Statistic Viewer - [http://nzdotstat.stats.govt.nz/wbos/Index.aspx?url=/tools\\_and\\_services/nzdotstat.aspx&gclid=CO\\_2jlemmL4CFUMQ7Aod1gcA\\_g](http://nzdotstat.stats.govt.nz/wbos/Index.aspx?url=/tools_and_services/nzdotstat.aspx&gclid=CO_2jlemmL4CFUMQ7Aod1gcA_g)

## M26. Brand infrastructure for leading regions and destinations

### Measure description

- Creating new / improving the existing brand infrastructure for the leading destinations and the first regions
- First step in differentiation on the international scene

### Objectives

- Destination brands in place at the end of 2024
- Regional brands in place at the end of 2026

### Responsibility

- Regional and destination tourism management organisations / tourism departments

### International practices

Region Alberta Brand Toolkit - <https://taprdsccdn.azureedge.net/cms/-/media/IndustryHub/files/programs-tools/industry-brand-toolkit/alberta-tourism-brand-industry-toolkit>

The Hague Brand - <https://www.brandthehague.nl/>

Regulation

Accessibility

Branding

Marketing

**Competitiveness**

Investments and  
General Bus Cond

## M27. Program of reconstruction / revitalization of city districts and smaller settlements

### Measure description

- Program aimed at increasing spatial aesthetics / reconstructing historic sites, settlements and rural areas;
- „Sense of arrival“ programs for key destinations, signage, facades

### Objectives

- Comprehensive plan until 2024
- Implementation and negotiations with donors and other partners from 2025 onward

### Responsibility

- Ministry of youth, culture and sport
- Ministry of regional development, building and housing

### International practices

City of Zagreb had large increase of tourist inflow from 2013 (entering EU) onwards and the government of the city started doing several Master plans to transform unused areas of the city into new city blocks for business, living and guests of the city.

The short overview of the projects (in Croatian) -

[https://www.zagreb.hr/UserDocsImages/gu%20za%20strategijsko%20plani%20ranje/2\\_PROJEKTI%20UREDAA\\_SJEDNICA%20PVGZ.pdf](https://www.zagreb.hr/UserDocsImages/gu%20za%20strategijsko%20plani%20ranje/2_PROJEKTI%20UREDAA_SJEDNICA%20PVGZ.pdf)

## M28. Brand infrastructure for leading regions and destinations

### Measure description

- Establishing the line of exclusive Ukrainian products and services
- The initiation of quality control in tourism
- Setting rules, procedures and labels

### Objectives

- Launch of “Ukrainian premium” label – start of 2025
- First branded / protected products and services – start of 2026

### Responsibility

- Ministry of youth, culture and sport, Ministry of agriculture

### International practices

Types of tourism labels in France: <https://www.france-voyage.com/cities-towns/labels.htm>

Regulation

Accessibility

Branding

Marketing

**Competitiveness**

Investments and  
General Bus Cond

## M29. Program of reconstruction / revitalization of city districts and smaller settlements

### Measure description

- Plan for utilizing culture heritage sites, building contemporary museum and interpretation centers
- Guidelines for conservation
- Favoring contemporary concepts (edutainment, interaction, VR, AR)

### Objectives

- 100% of increase in attendance at cultural objects in Ukraine (2022 – 2025);
- 10 new museums and/or interpretation centres (2022 – 2025).

### Responsibility

- Ministry of youth, culture and sport

### International practices

Long night in the museums – event organised once per year where all the museums have free entry and are open up to midnight – example Vienna - <http://www.visitingvienna.com/entertainment/events/night-of-the-museums/>

Historic Scotland, agency that takes care of all historic venues in Scotland and is financed through ticketing as well as through memberships (which have benefits – free entrance etc) - <https://members.historic-scotland.gov.uk/>

Regulation

Accessibility

Branding

Marketing

Competitiveness

Investments and  
General Bus Cond

## M30. Meeting and conference facilities planning

### Measure description

- MICE facilities have significant economic impact on destinations – therefore usually public projects
- Measure includes identification, preparation, design and project preparation for at least three facilities up to contemporary standard

### Objectives

- 3 planned and architecturally designed convention / exhibition facilities;
- Prepared locations for investments.

### Responsibility

- Ministry of youth, culture and sport, National Convention office

### International practices

Convention center Dublin

<https://www.theccd.ie/>

Astana EXPO 2017 Congress center

[https://expo2017astana.com/en/page\\_id=53](https://expo2017astana.com/en/page_id=53)

## Reflections and Opinions

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**We would like to hear your opinion on Phase 2  
and proposed measures**



15:00 – 15:15

# Agenda

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09:30h	Workshop start / Introduction
10:00h	Analytical Findings and Procedures
11:00h	Presentation of the Strategy
11:25h	<i>Coffee Break</i>
11:40h	First phase of strategy framework and measures
13:00h	<i>Lunch Break / Finger Food</i>
13:30h	Second phase of strategy framework and measures
15:00h	<i>Coffee Break</i>
<b>15:15h</b>	<b>Third and fourth phase of strategy framework and measures</b>
16:00h	Wrap up

# Slot 6

## Third and fourth phase of strategy framework and measures

- Proposal Outline (30 mins)
- Opinions and Reflections (15 mins)



15:15 – 16:00



**Branko Bogunović, HDC**  
**Zoran Kasum, HDC**

## Third phase proposal outline

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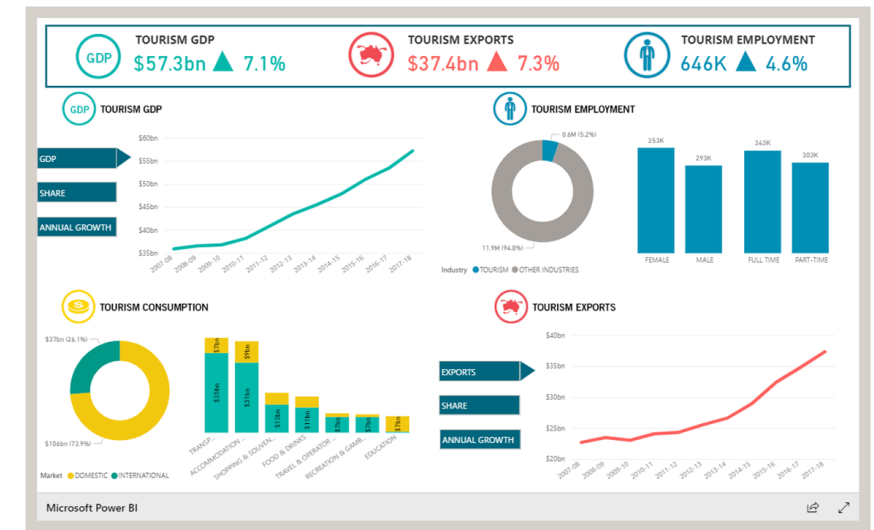
### **CAPITAL INVESTMENT AND PRODUCT DEVELOPMENT (2026-2029)**

- **REGULATION AND MANAGEMENT**
- **ACCESSIBILITY**
- **MARKETING**
- **COMPETITIVENESS**
- **INVESTMENTS AND GENERAL BUSINESS CONDITIONS**

Mainly add-on measures and activities onto previous phases

# Regulation and management

- **3<sup>rd</sup> phase of tourism statistics** reorganisation:
  - eVisitor system (digital register of all accommodation objects with data on visitors and their basic characteristics on a daily basis);
  - Regular TSA on national level (performed by Ukrainian institutions).
- **3<sup>rd</sup> phase of tourism reorganisation** - vertical system of RMO's (regional management organisations), DMO's (destination management organisations) and TIC's (Tourist Information Centres);
- Continuation of tourism **marketing and master planning** for the remaining attractions;
- Strengthening and updating of **tourist inspections**, which will especially be demanding in the field of private accommodation



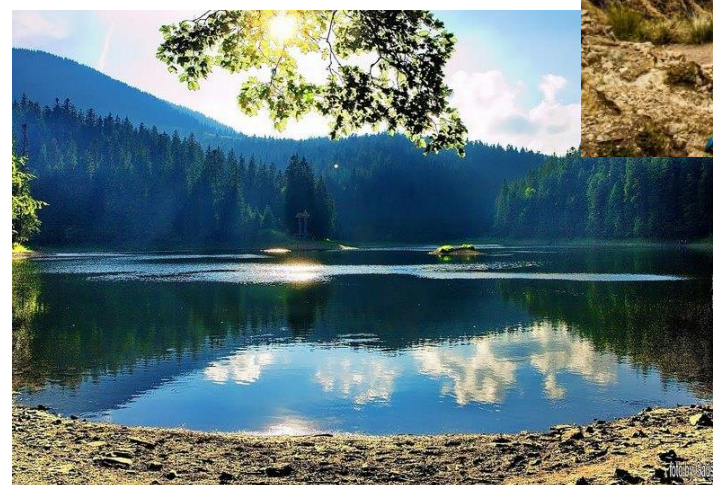
# Accessibility

- Development of **hiking and biking trails** (1<sup>st</sup> phase) in line with the national program outlined in the 2<sup>nd</sup> phase, where priority is to enhance **tourism value chains of 1<sup>st</sup> and 2<sup>nd</sup> tier destinations;**
- Development / reconstruction of regional transport hubs (**railways / airports**) for the purposes of new product development;
- Development of **sea and river cruises infrastructure** according to national programme outlined in the second phase of tourism development



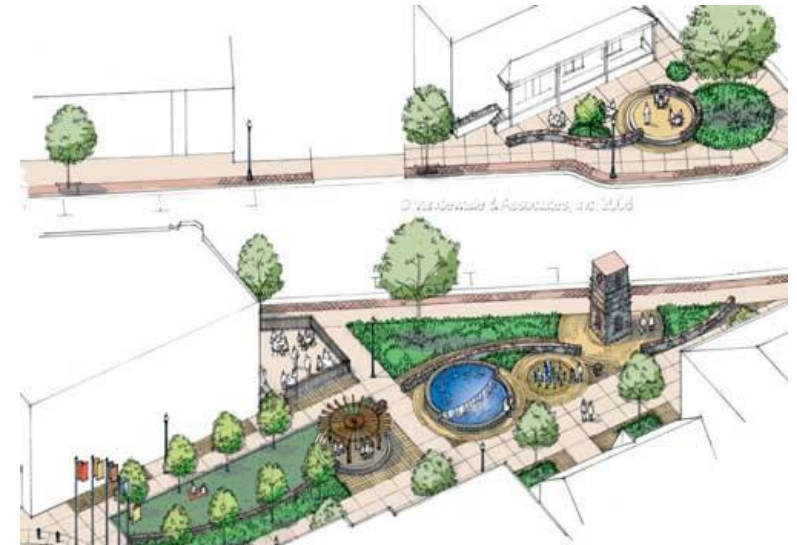
# Marketing

- Product development and packaging activities for **touring / culture** products;
- Product development and packaging activities for **nature / wildlife and active and adventure** products;
- New **tourism marketing plan for Ukraine 2027 – 2031** to be completed in the 3<sup>rd</sup> quarter of 2026.



# Competitiveness

- Introduction of new environmental treatment standard **“Green Ukraine”** and intensive internal promotion;
- Programs for **enhancement** of spatial aesthetics in rural areas including accessibility to green areas (**entrances, paths, architectural barriers, information, timetable, doors and fences, lighting, etc.**)



# Investments and general business conditions

- Adapting **taxation system in tourism** (tourist taxes, VAT for accommodation and catering services, other related taxations) to international competitive level.
- Creation of **fund for subsidizing interests for loans on selected accommodation and tourist infrastructure projects;**
- **Public investments:**
  - Construction / reconstruction of up to 3 meetings, conference and exhibition centres;
  - Major tourist infrastructure for selected destinations – national parks, museum, interpretation centres, other cultural attractions and related transport infrastructure.



Special bus for volcanic ground, Iceland



Expo Mazuri, Poland



Bridge over the glacier river, New Zealand



Electric powerhouse museum, Odde, Norway

# Investments and general business conditions



**Tourism infrastructure master plan, New Zealand**

## Fourth phase proposal outline

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### **QUALITY ASSURANCE AND DIFFERENTIATION (2030-onwards)**

Public management is concentrated in creating and maintaining intelligent business environment with following objectives in this phase:

- Regional Tourism satellite accounts
- Introduction in international gastronomy organisations, guidebook and standards (Michelin etc)
- “Destination dashboard” initiative
- Finalisation of digital transformation of tourism supply
- National / regional / local system of intermediation build-up

## Reflections and Opinions

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**We would like to hear your opinion on Phase 3  
and Phase 4**

# Agenda

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09:30h	Workshop start / Introduction
10:00h	Analytical Findings and Procedures
11:00h	Presentation of the Strategy
11:25h	<i>Coffee Break</i>
11:40h	First phase of strategy framework and measures
13:00h	<i>Lunch Break / Finger Food</i>
13:30h	Second phase of strategy framework and measures
15:00h	<i>Coffee Break</i>
15:15h	Third and fourth phase of strategy framework and measures
<b>16:00h</b>	<b>Wrap up</b>

# Slot 7

## Wrap up

- End conclusions and thank you note



16:00 – 16:30



Denis Torkhov, EBRD  
Zoran Kasum, HDC

## Steps further

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- Feedback from workshop
- Conference in November
- Availability of the final document

Thank you!

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