



## About UNWTO

- A specialized agency of the United Nations
- Global forum for tourism policy issues and a practical source of tourism know-how
- Promotion of responsible, sustainable and universally accessible tourism
- Mainstreaming tourism in the global agenda
- 157 Member States, 6 territories and + 500 Affiliate Members



[www2.unwto.org/en/content/who-we-are-0](http://www2.unwto.org/en/content/who-we-are-0)



a specialized Agency of the United Nations

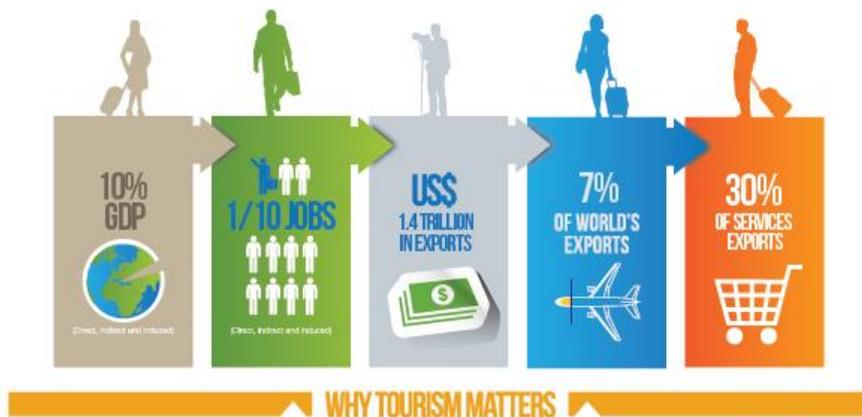




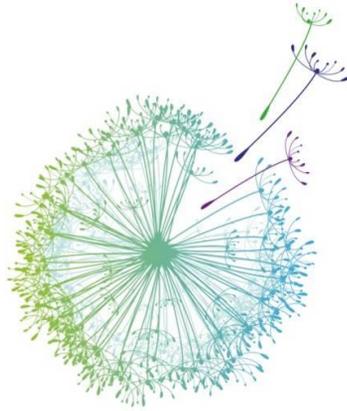
## Overview

- International Year of Sustainable Tourism for Development
- Continued growth of demand
- Tourism and change, innovation, disruption
- New platform tourism services
- Building resilience
- What's more...

## Why tourism matters?



# How can you celebrate?



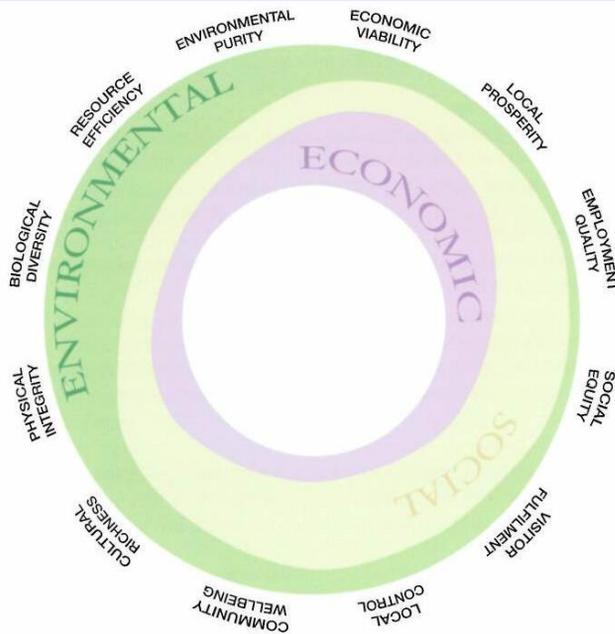
**2017**  
**INTERNATIONAL YEAR**  
**OF SUSTAINABLE TOURISM**  
**FOR DEVELOPMENT**

[www2.unwto.org/tourism4development2017](http://www2.unwto.org/tourism4development2017)



**Sustainable  
tourism for  
development**

## Sustainable tourism



*“Tourism that takes full account of its current and future **economic, social and environmental impacts**, addressing the needs of visitors, the industries, the environment and host communities”*

*“[...] is a continuous process and requires constant monitoring of impacts”*

Agency of the United Nations



## Sustainable tourism

Sustainable tourism development requires the **informed participation of all relevant stakeholders**, as well as **strong political leadership** to ensure **wide participation and consensus building**. Achieving sustainable tourism is a **continuous process** and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

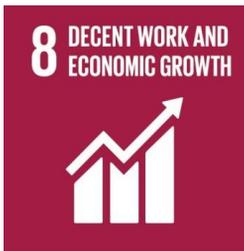
## The 2030 Agenda for Sustainable Development



UNWTO – a Specialized Agency of the United Nations



## The 2030 Agenda for Sustainable Development



Target 8.9 – by 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.



Target 12.b – develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs, promotes local culture and products.



Target 14.7 – by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism.

UNWTO – a Specialized Agency of the United Nations



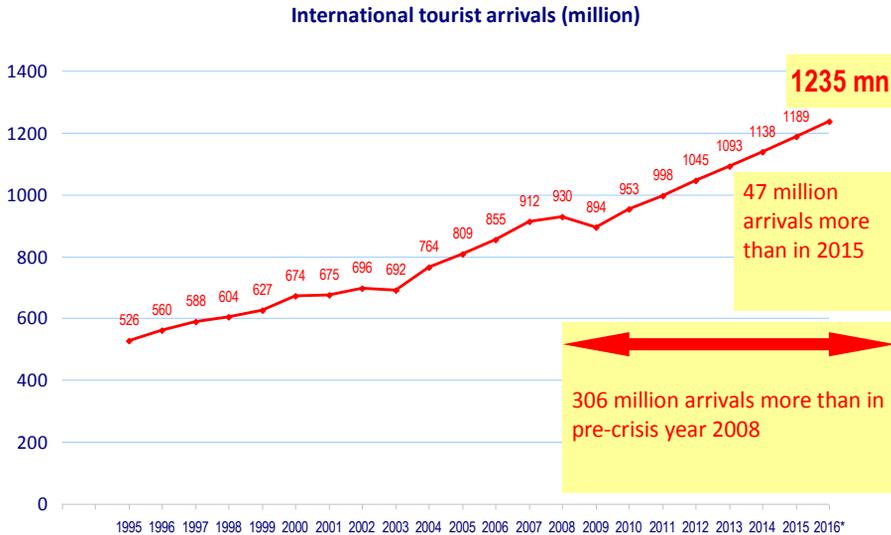
## IYSTD2017

### Key Areas

- Inclusive and sustainable economic growth
- Social inclusiveness, employment and poverty reduction
- Resource efficiency, environmental protection and climate change
- Cultural values, diversity and heritage
- Mutual understanding, peace and security

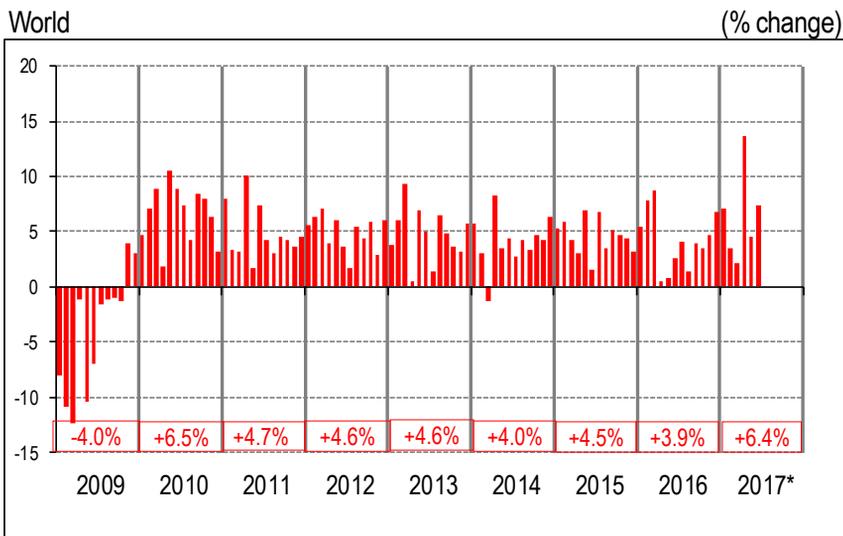


# Inbound tourism in the world



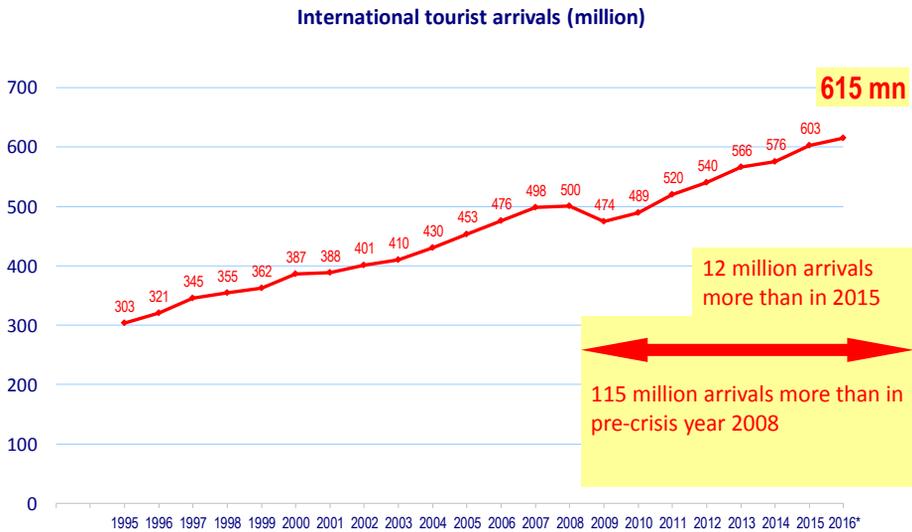
# Heading to the 8<sup>th</sup> consecutive year of sustained growth

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

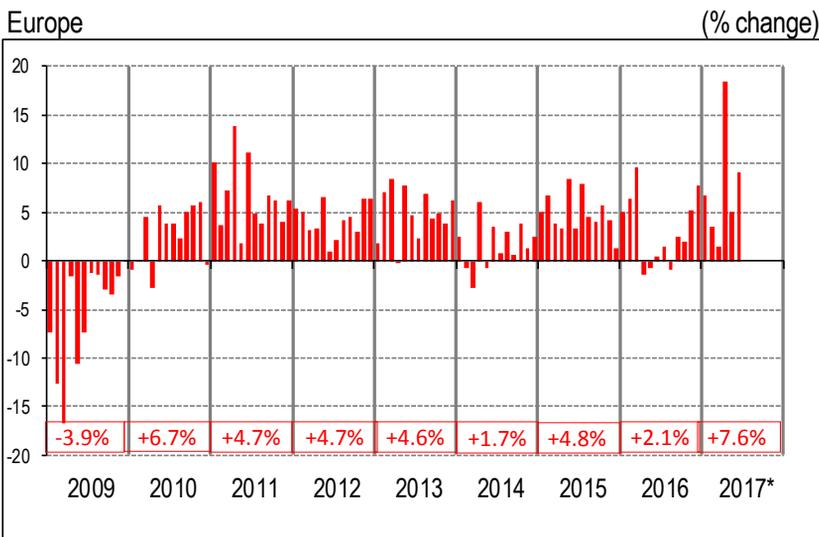
# Inbound tourism in Europe



Source: World Tourism Organization (UNWTO)

# Heading to the 8<sup>th</sup> consecutive year of sustained growth

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

# Current trends

## UNWTO World Tourism Barometer

**Statistical Annex**

**UNWTO World Tourism Barometer**  
Volume 13 - March 2017

**Outbound tourism on the rise from many source markets**

China tourists spent 17% more on tourism abroad in 2016

**Volume 13 - March 2017**

**Contents**

- International tourist arrivals by destination and gender
- International tourist arrivals, monthly season
- International tourist arrivals by country
- International tourist arrivals and tourism markets

The latest data on international tourism identifies key drivers of growth in the industry, such as innovation, change and disruption. The data is presented in a clear and concise manner, with a focus on the most important trends and insights. The report is a valuable resource for anyone interested in the tourism industry.

<http://mkt.unwto.org/barometer>

## EU Short-Term Tourism Trends

**European Union Short-Term Tourism Trends**  
Volume 4 - 2017-1

**Overview**

The volume of the European Union Short-Term Tourism Trends report is 499 value. The volume of the European Union Short-Term Tourism Trends report is 40%. The volume of the European Union Short-Term Tourism Trends report is 21 million.

Indicator	Value
European Union Short-Term Tourism Trends	499
European Union Short-Term Tourism Trends	40%
European Union Short-Term Tourism Trends	21 million

<http://mkt.unwto.org/content/collaboration-european-union>



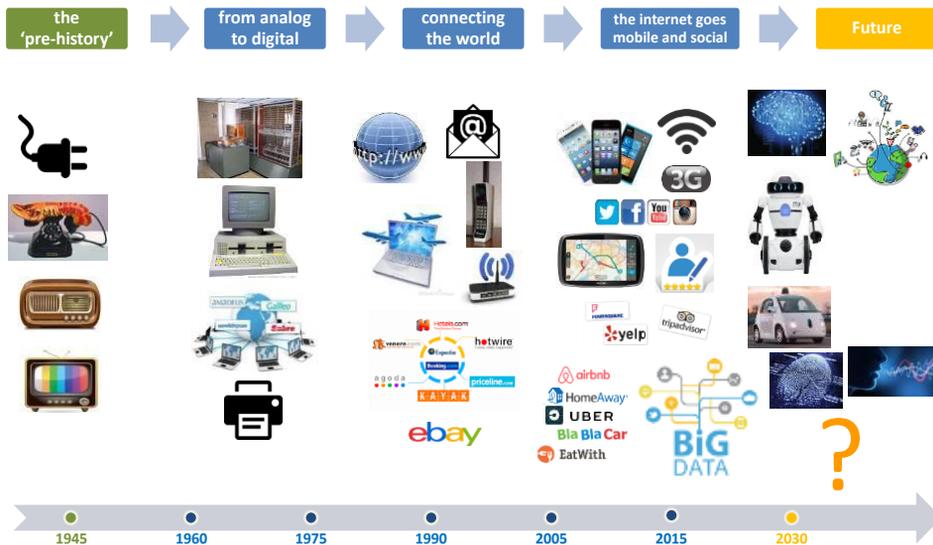
**Drivers: change, innovation, disruption**

## External factors continuously change the world and tourism

STEEPLED analysis  
(extension of PEST)



## ICT: Connected world



## Some recent game changers

- paperless travel (tickets, boarding cards)
- consolidation OTA's
- further expansion of low-cost airlines
- growth of Chinese airlines
- new mega hubs in the Middle East and Turkey
- investment in infrastructure, i.e. airports, roads, high-speed trains
- visa facilitation – safe, secure and seamless travel
- smart phone
- social media
- user created content, reviews
- e-marketing (use of internet and social media in marketing and promotion)
- New platform tourism
- GPS navigation and geo relevant content
- Smart cities
- experience economy, storytelling

## World, economy and tourism constantly changing

- **innovation:** new ideas, R+D (C+I), entrepreneurship, investment, passion and perseverance
- **T** is a strong driver for tourism, in: connectivity: transport, infrastructure, facilitation; logistics, management and administration; safety & security; hospitality and catering; marketing and promotion
- not all change is tech: e.g. business models, organisation, architecture, design, new or improved services, human resource development, etc.
- but ultimately tourism is an experience, **T** is a tool / enabler / facilitator
- **Change as driver of development:**
  - offering of new or better products and services, enhancing experience
  - increase of choice, further differentiation, diversification and sophistication
  - lower price through lower costs / use of economies of scale / increase of labour productivity & value added
  - changes often incremental, but can also sometimes lead to major shifts and disruption: need to stay competitive
  - source of market growth, through: inclusiveness, open up for broader part of society, enabling more frequent trip taking, opportunity for entry of new entrepreneurs



## New platform tourism services

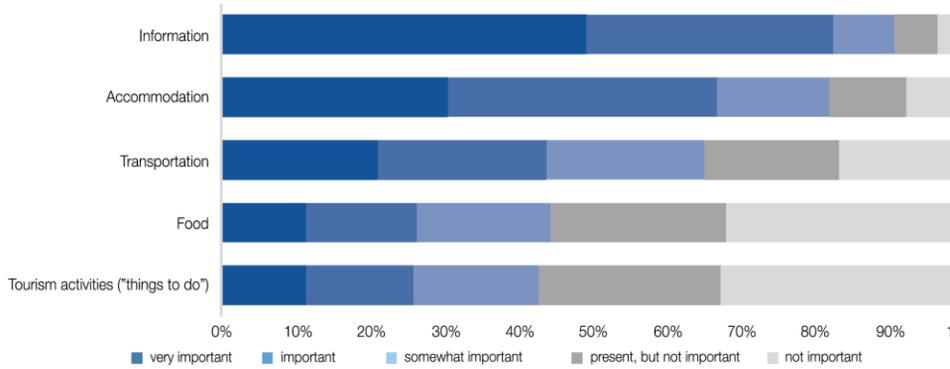
- **Aim:** First step towards enhancing the understanding of this phenomenon in tourism by putting it into context of development and change.
- **Survey:**
  - UNWTO Member States, Affiliate Members and a selection of cities were invited to participate.
  - A Discussion Paper summarizing the key ideas was prepared and disseminated, alongside with the Survey.
  - 114 responses were received from all around the world
- Final report to be presented at the 22nd UNWTO General Assembly in Chengdu, China.



## UNWTO Survey - results

- Information, accommodation and transport scored the highest importance among respondents

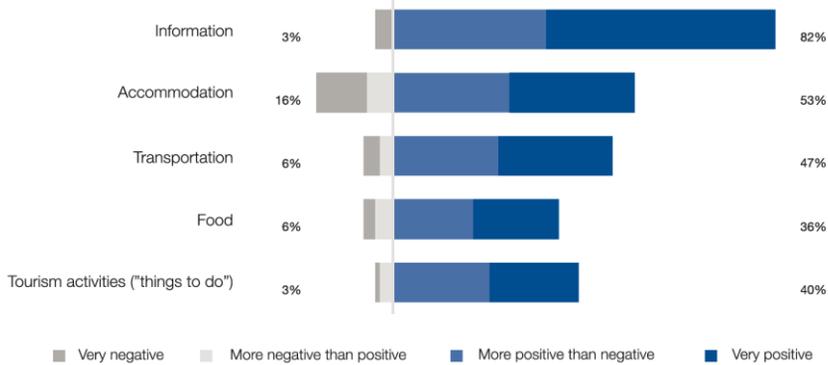
B1: How do you rate the current importance of private tourism services through digital platforms for your destination/activity?



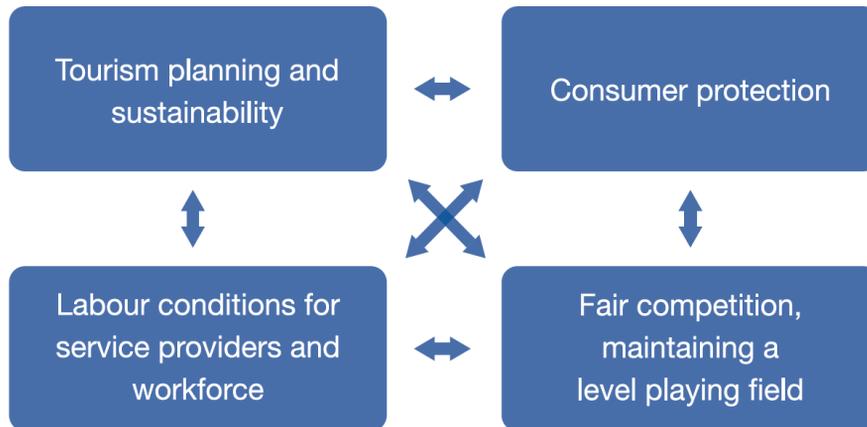
## UNWTO Survey - results

- Positive impact prevails for the majority of respondents

D1: How do you rate the current overall effect of private tourism services through digital platforms for your destination/activity?



## Areas of governance for new platform tourism services



## The way forward – no ‘one size fits all’ recipe

### Understanding and monitoring

- Assess the size and structure of the market through measurement and research to take informed and evidence based decisions
- Learn from other destinations and their experiences

### Review and Rethinking policies

- Recognise that traditions and regulations differ widely by destination
- Review and rethink current situation and policy (including regulation) and adjust smartly if needed and possible
- Raise awareness of rules
- Guarantee enforcement

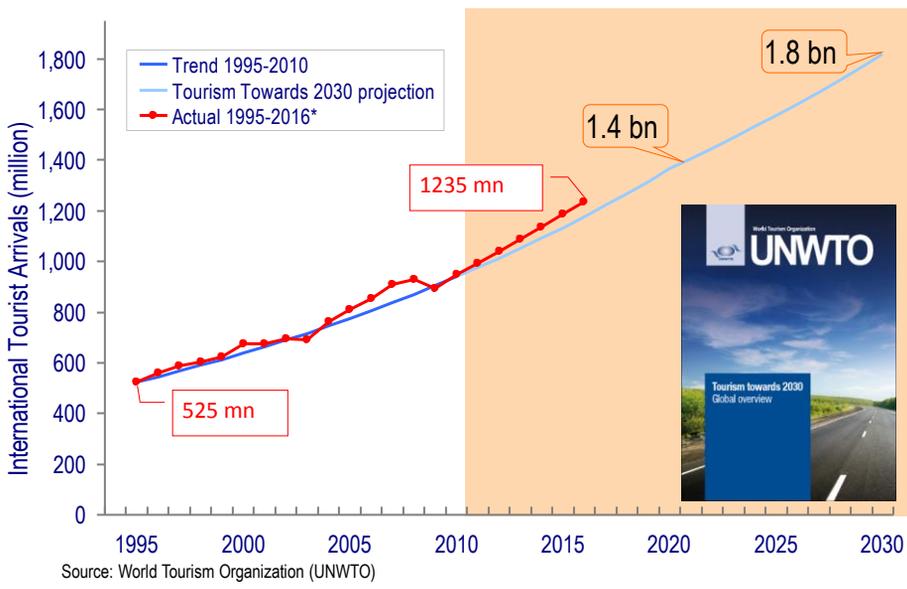
### Adapting on a 4C approach

- Dialog with all stakeholders (vitamin 4C: Communication, Collaboration, Cooperation and Coordination)
- Co-operate/collaborate with platforms and encourage the sharing of information
- Adjustment to the new situation: foster and allow innovation (some destinations/companies already embraced elements of the new offer)



**Building  
resilience**

**Actual Trend vs. Tourism Towards 2030 projection  
World**

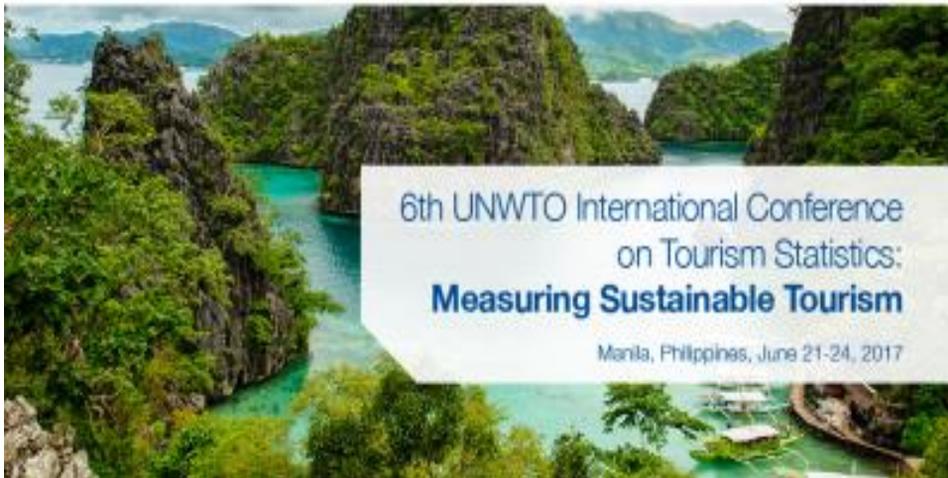


## Sustainability



## Sustainability

- with the expected continuation of growth **sustainability** (social, economic and environment) is more critical than ever
- need for addressing issues around:
  - use of resources and energy dependency
  - the treatment of waste water and solid waste
  - climate change adaptation and mitigation, green economy,
  - nuisance, social tension
  - congestion
  - risks
- through:
  - integrated planning taking traffic flows into account, zoning, pedestrian areas, use of public transport, interconnectivity
  - product development of low impact products
  - integrated management
  - investment
  - congestion management, i.e. spreading over place and time, reducing impact, positioning, marketing, pricing



## Aim

- **To develop an international statistical framework for measuring tourism's role in sustainable development**
- **Integrated data for integrated policy**
- **Manila Call for Action on Measuring Sustainable Tourism**

Papers, declaration and conference video at  
[www.mstconference.org](http://www.mstconference.org)

Next event: Workshop on Measuring the economic impact of tourism in Europe: the Tourism Satellite Account (TSA), Brussels, Belgium (29-30 November 2017). For info:  
[http://statistics.unwto.org/event/DG\\_Grow\\_WS](http://statistics.unwto.org/event/DG_Grow_WS)

## UNWTO SG's Statement

### 'Tourism: growth is not the enemy; it's how we manage it that counts'

1. Diversify visitor activities, both in type and location
2. Effective and integrated mechanisms and policies to manage visitors at sites
3. Policies to reduce seasonality
4. Incentives for the private sector to invest in new areas and new products



<http://media.unwto.org/press-release/2017-08-15/tourism-growth-not-enemy-it-s-how-we-manage-it-counts>



## Guilin Forum on Tourism Trends and Outlook

The 11th UNWTO/PATA Forum on Tourism Trends and Outlook  
10-12 October, 2017, Guilin, China



<http://asiapacific.unwto.org/event/unwtopata-forum>

## International Seminar on Transnational Tourism Themes and Routes

INTERNATIONAL SEMINAR ON  
TRANSNATIONAL TOURISM THEMES AND ROUTES

16-18 NOVEMBER 2017  
SANTIAGO DE COMPOSTELA

**SAVE THE DATE**

EUROPEAN TRAVEL COMMISSION

UNWTO

galicia

need Spain

 A promotional banner for an international seminar. The background is a night photograph of the Santiago de Compostela Cathedral in Spain, illuminated against a dark sky. The text is overlaid on the image. On the right side, there are logos for the European Travel Commission, UNWTO, Galicia, and need Spain.

**World Tourism Day – 27 September 2017**



**Register now for the World Tourism Day!**  
follow us #WTD2017 #IY2017 #TravelEnjoyRespect



## Where to find information prepared by UNWTO?

UNWTO

[www.unwto.org](http://www.unwto.org), follow us on:    

Affiliate Membership:

<http://affiliatemembers.unwto.org>

Facts & Figures

[www.unwto.org/facts](http://www.unwto.org/facts)

Publications (and list depositary libraries) <http://publications.unwto.org>

• electronic & hardcopy : => UNWTO eLibrary [www.e-unwto.org](http://www.e-unwto.org)

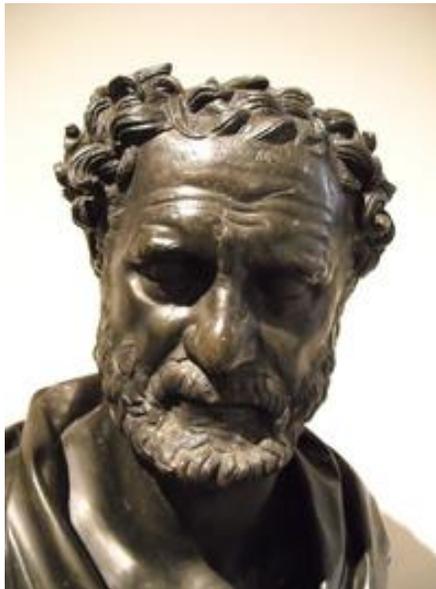
• statistics online

[www.e-unwto.org/toc/unwtotfb/current](http://www.e-unwto.org/toc/unwtotfb/current)



‘The only thing that is constant is change’

Heraclitus, c. 535 - 475 BC



Thank you very much for  
your attention!

Michel Julian

Statistics and Trends Programme

World Tourism Organization  
(UNWTO)

[www.unwto.org](http://www.unwto.org)