



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



a specialized Agency of the United Nations

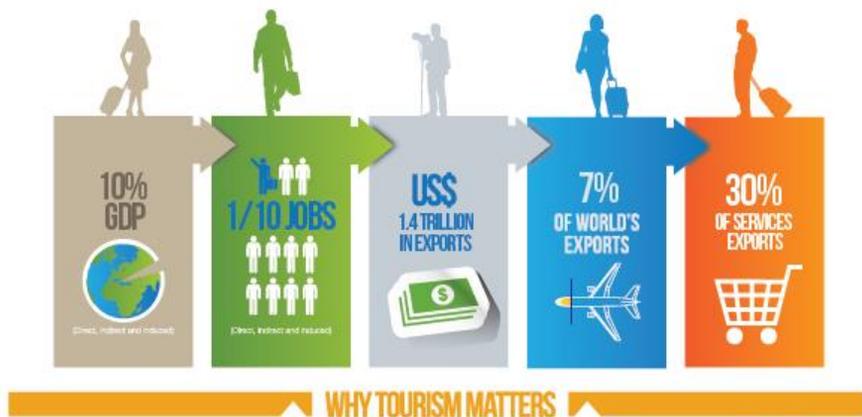




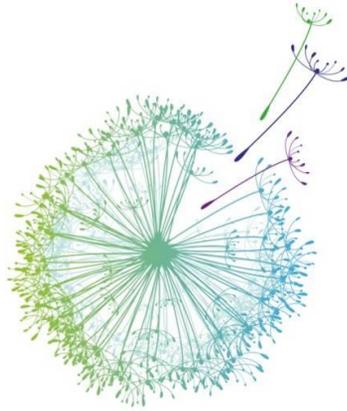
Overview

- 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?



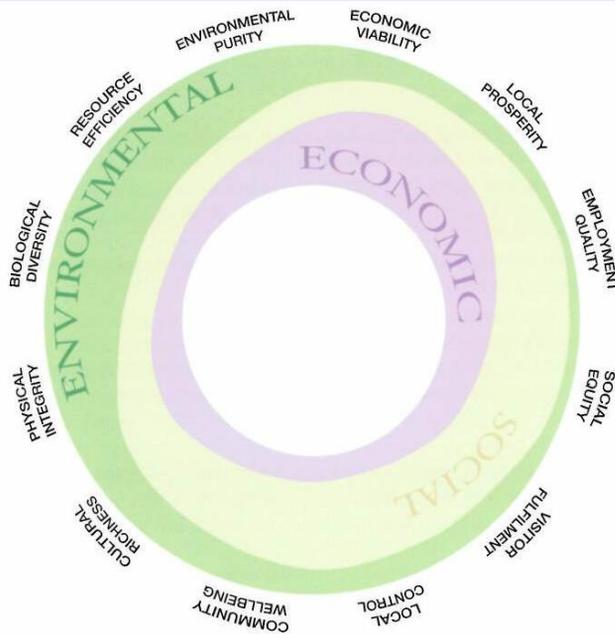
2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT

www2.unwto.org/tourism4development2017



**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.

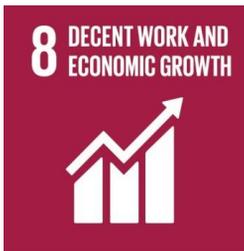
The 2030 Agenda for Sustainable Development



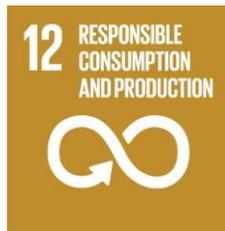
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The 2030 Agenda for Sustainable Development



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



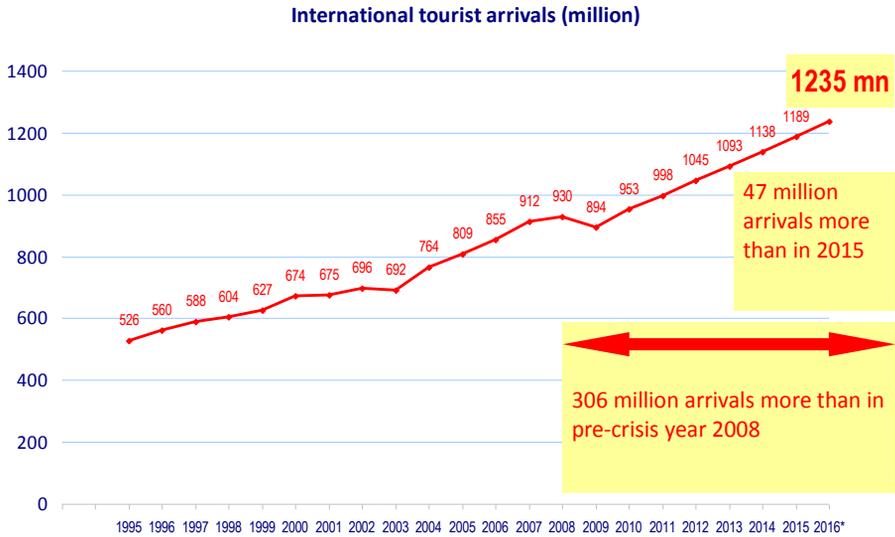
IYSTD2017

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

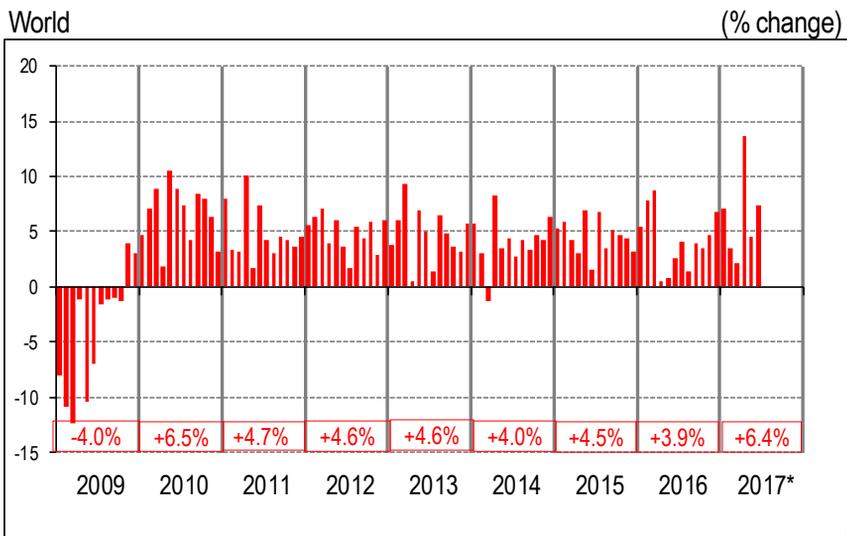


Inbound tourism in the world



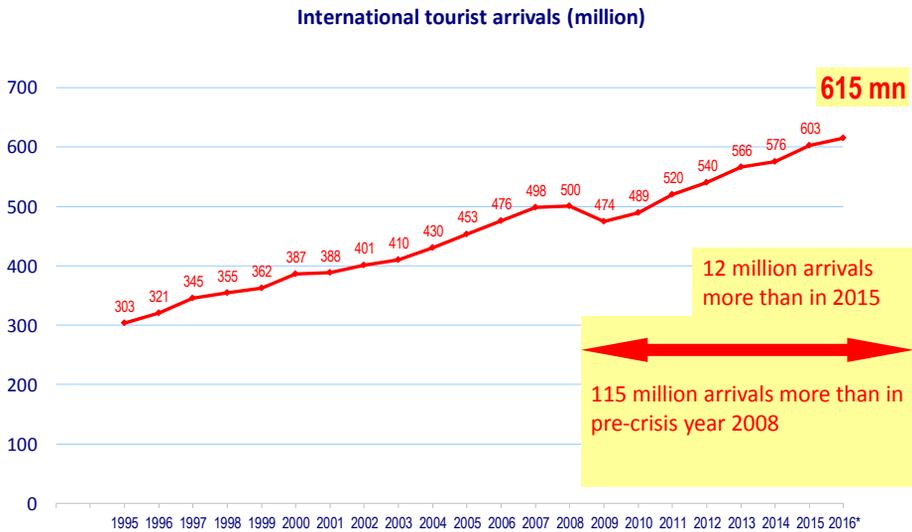
Heading to the 8th consecutive year of sustained growth

International Tourist Arrivals, monthly evolution



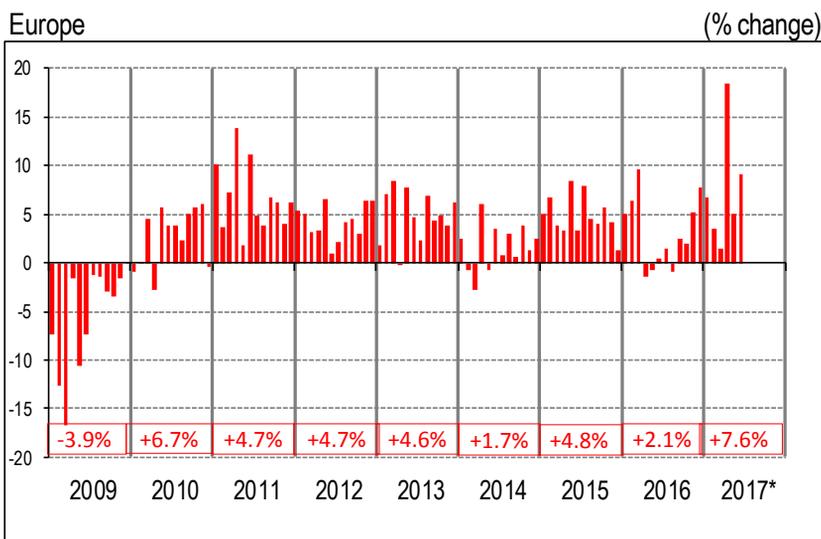
Source: World Tourism Organization (UNWTO) ©

Inbound tourism in Europe



Heading to the 8th consecutive year of sustained growth

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Current trends

UNWTO World Tourism Barometer

UNWTO World Tourism Barometer
 Volume 15 - March 2017

Statistical Annex

The annex pages contain detailed data on tourism trends worldwide, such as international tourist arrivals, international tourist arrivals by country, and the tourism sector's contribution to GDP.

Outbound tourism on the rise from many source markets

2016 results on expenditure from major industrial countries reflect continued demand for international tourism services. The United States remains the largest source market, followed by the United Kingdom, Germany, France, and Italy.

China tourists spend 17% more on tourism abroad in 2016

China tourists spent 17% more on tourism abroad in 2016 than in 2015, according to the UNWTO World Tourism Barometer. This increase is attributed to a rise in the number of Chinese tourists and their higher spending on tourism services.

Volume 15 - March 2017

Contents

- International tourist arrivals (2016)
- International tourist arrivals by country (2016)
- International tourist arrivals and tourism receipts (2016)
- International tourist arrivals and tourism receipts (2015)
- International tourist arrivals and tourism receipts (2014)
- International tourist arrivals and tourism receipts (2013)
- International tourist arrivals and tourism receipts (2012)
- International tourist arrivals and tourism receipts (2011)
- International tourist arrivals and tourism receipts (2010)
- International tourist arrivals and tourism receipts (2009)
- International tourist arrivals and tourism receipts (2008)

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

EU Short-Term Tourism Trends

European Union Short-Term Tourism Trends
 Volume 14, 2017-1

Overview

The volume of the European Union Short-Term Tourism Trends report provides an overview of tourism trends in the European Union. The report highlights that international tourist arrivals in the EU reached a record high of 499 million in 2016, up from 495 million in 2015. Tourism receipts also reached a record high of 421 billion euros in 2016, up from 376 billion euros in 2015.

European Union tourism in 2016 at a glance

- 499 million international tourist arrivals
- 40% increase in tourism receipts
- 421 billion euros in tourism receipts

Key findings

- International tourist arrivals in the EU reached a record high of 499 million in 2016, up from 495 million in 2015.
- Tourism receipts also reached a record high of 421 billion euros in 2016, up from 376 billion euros in 2015.
- The growth rate in international tourist arrivals in the EU was 0.8% in 2016, up from 0.7% in 2015.
- The growth rate in tourism receipts in the EU was 12.0% in 2016, up from 11.9% in 2015.

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

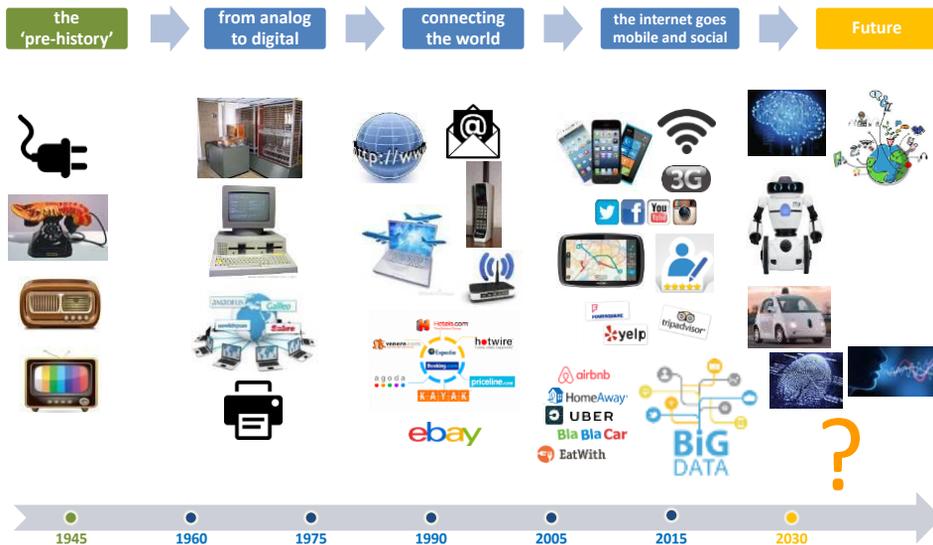


External factors continuously change the world and tourism

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

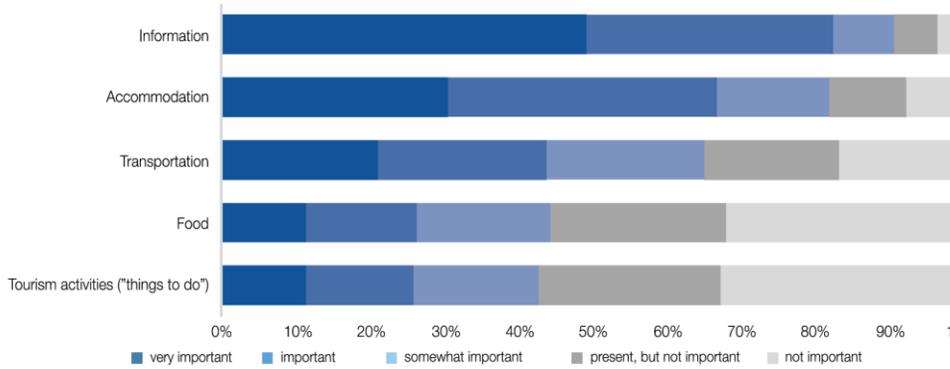
- **Aim:** First step towards enhancing the understanding of this phenomenon in tourism by putting it into context of development and change.
- **Survey:**
 - UNWTO Member States, Affiliate Members and a selection of cities were invited to participate.
 - A Discussion Paper summarizing the key ideas 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

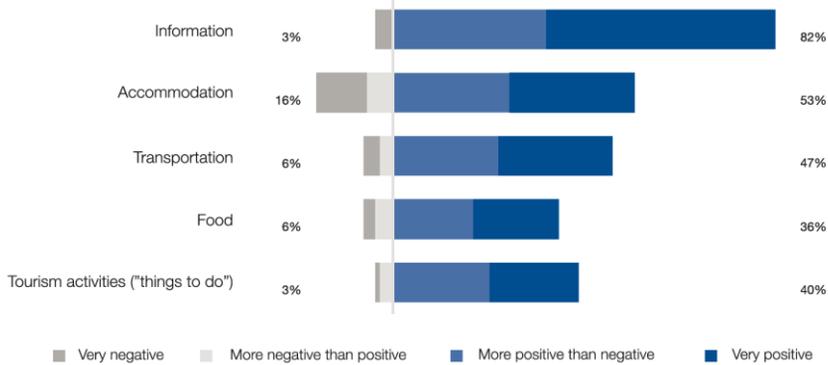
B1: How do you rate the current importance of private tourism services through digital platforms for your destination/activity?



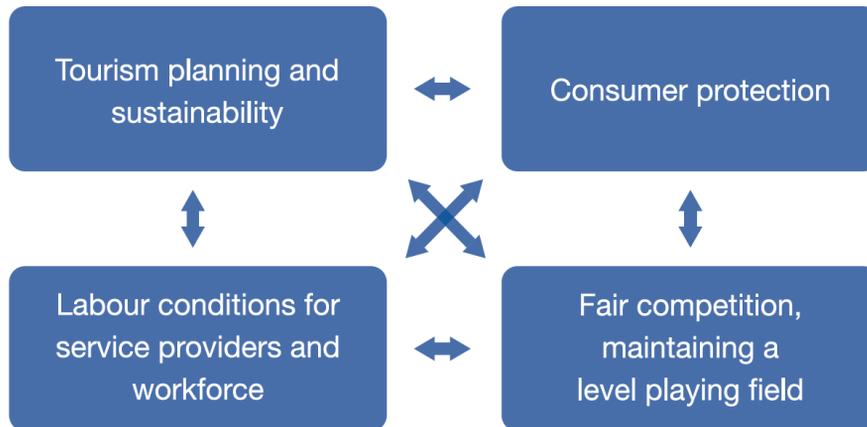
UNWTO Survey - results

- 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

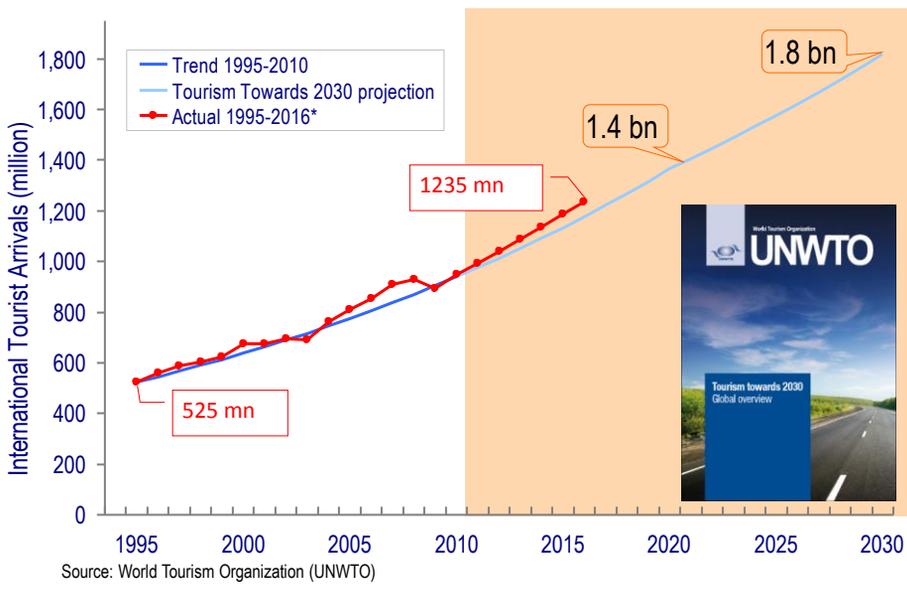
Adapting on a 4C approach

- 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**

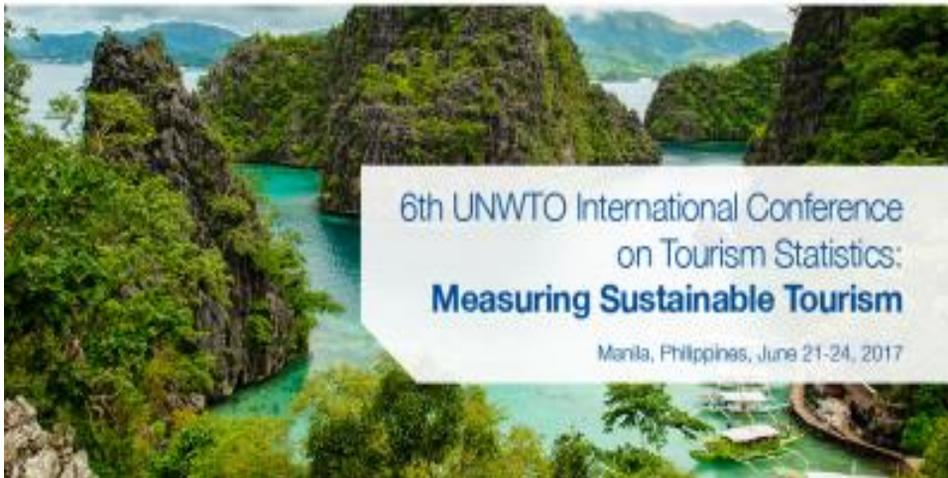


Sustainability



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

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

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 the seminar. The background is a night photograph of the Santiago de Compostela cathedral in Galicia, Spain, with its towers illuminated. 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



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Facts & Figures

www.unwto.org/facts

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

• electronic & hardcopy : => UNWTO eLibrary www.e-unwto.org

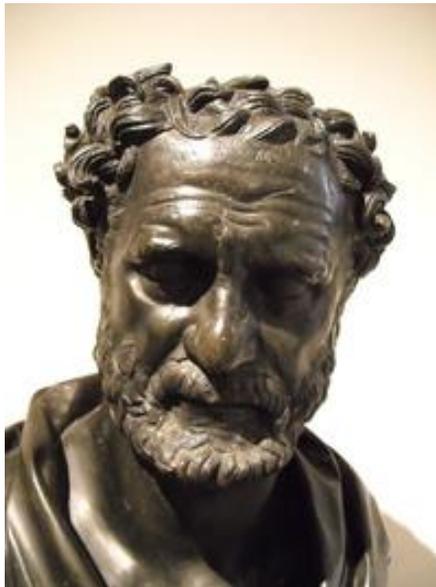
• statistics online

www.e-unwto.org/toc/unwto/tfb/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