



The World Tourism Organization (UNWTO)

- a specialized agency of the United Nations (UN) and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how
- plays a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, paying particular attention to the interests of developing countries
- intergovernmental organization with membership includes 157 countries, 6 Associate Members and over 480 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities
- encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts
- committed to the United Nations Millennium Development Goals, geared toward reducing poverty and fostering sustainable development



www2.unwto.org/en/content/who-we-are-0



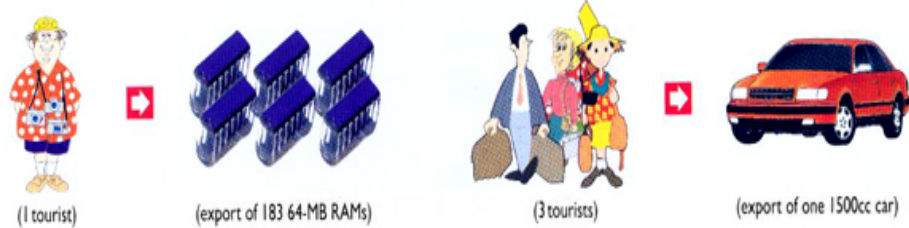
Why Tourism?

=> **Tourism is economic activity with substantial impact**

- Employment
- Diversification of economy / Tax revenues
- Earning foreign currency / balancing Balance of Payments
(inbound tourism = export / outbound = import ; tourism = 30% of worldwide service exports, 5.5% of overall exports)
- Development of weak regions / Regeneration of regions in decay
- Redistribution of wealth between countries and within countries
- Multiplier effect > impact in several other sectors
- Preservation of culture
- Soft diplomacy

Why Tourism?

Economic benefits from tourists



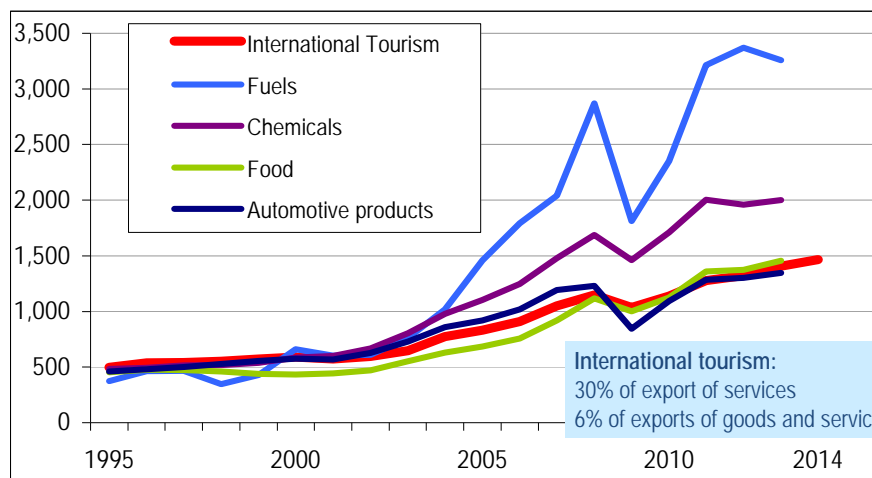
Source: Korea Tourism Organization (KTO), www.etourkorea.com

International tourism vs. other export categories

International Tourism (BOP Travel & Passenger transport) and export

World

(US\$ billion)



International tourism:
30% of export of services
6% of exports of goods and services

Source: World Tourism Organization (UNWTO) and World Trade Organization (WTO)

Share in trade and services by subregion



Tourism in the global agenda



Tourism in the global agenda

- **G20** recognizes for the first time Travel and Tourism as a vehicle for job creation, economic growth and development, and commits to work on travel facilitation



- **Rio+20** recognizes the significant contribution of sustainable tourism to the three dimensions of sustainable development, its linkages to other sectors and its capacity to create decent jobs and trade opportunities.

UN: from MDGs to SDGs



www.un.org/sustainabledevelopment/sustainable-development-goals
<https://sustainabledevelopment.un.org>

Tourism and the SDGs



8.9) by 2030, devise and implement policies to promote **sustainable tourism** that creates jobs and promotes local culture and products

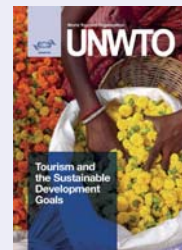


12.b) develop and implement tools to monitor sustainable development impacts for **sustainable tourism** which creates jobs, promotes local culture and products



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**

To promote **sustainable tourism** which creates jobs, promotes local culture and products



www.e-unwto.org/dol/pdf/10.18111/9789284417254



Tourism Towards 2030 : Key Results



World Tourism Organization

UNWTO

Tourism towards 2030
Global overview



Continued growth of demand

From advanced markets

- established markets still far from saturated, however growth potential is comparatively moderate
- growth both from:
 - increase of participation, but tourism is already available for broad part of society
 - increased frequency: more frequent but shorter stays

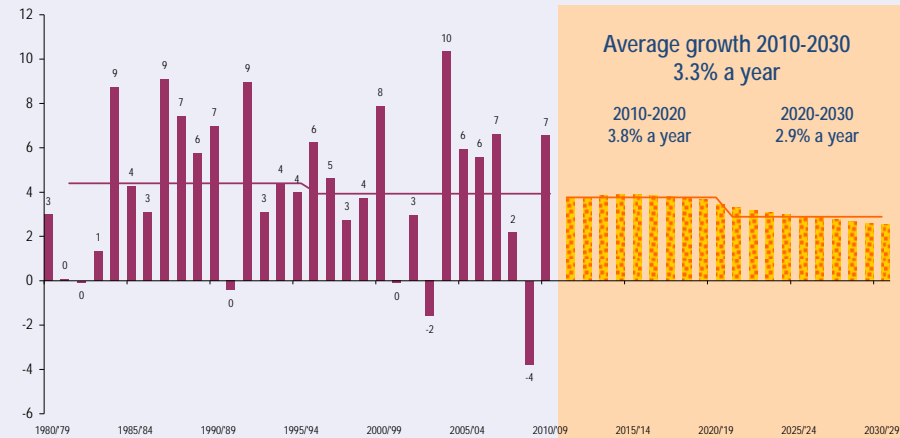
From emerging markets

- still huge potential for growth to exploit from current travellers but above all from new emerging middle classes
- sizable populations currently still only take part in international tourism very limitedly
- many emerging economies show rapid economic growth resulting in increasing disposable incomes
- a relative big share of this increase will be spent on tourism (domestic as well as international)

Growth in international tourism will continue, but at a more moderate pace

International tourism, World

International Tourist Arrivals, % change over previous year

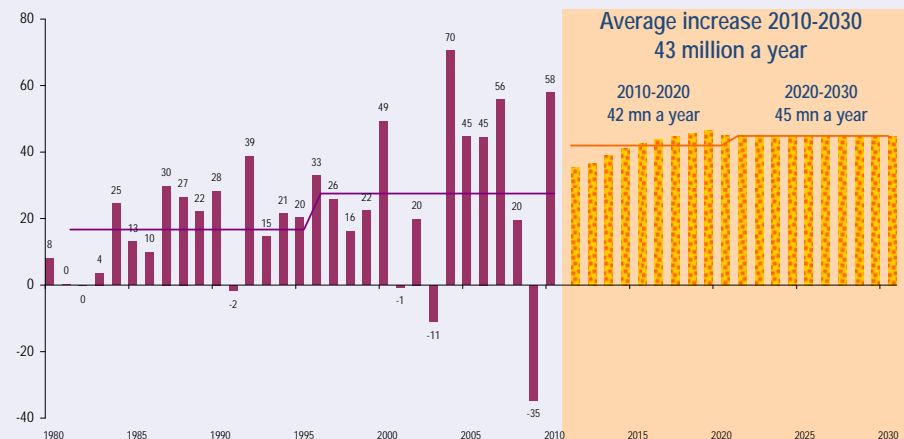


source: World Tourism Organization (UNWTO) ©

International tourist arrivals to increase by 43 million a year on average

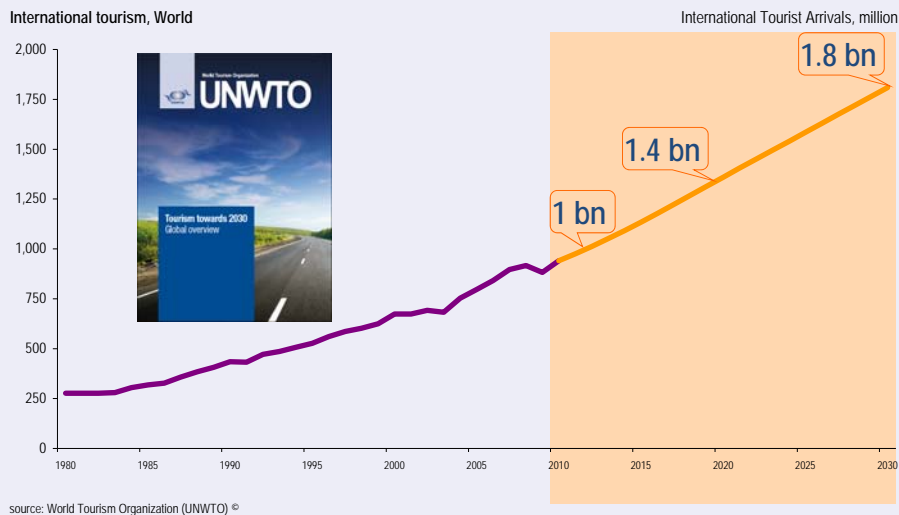
International tourism, World

International Tourist Arrivals, absolute change over previous year, million



source: World Tourism Organization (UNWTO) ©

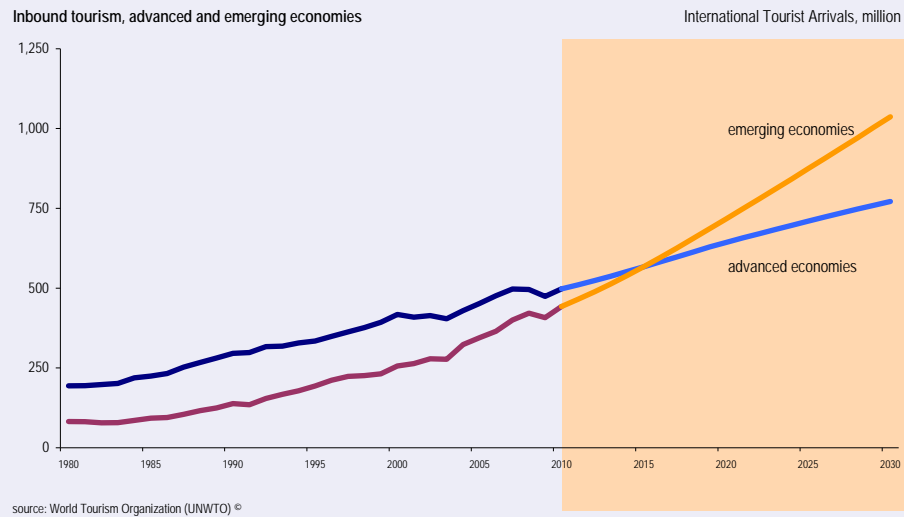
International tourist arrivals to reach 1.8 billion by 2030



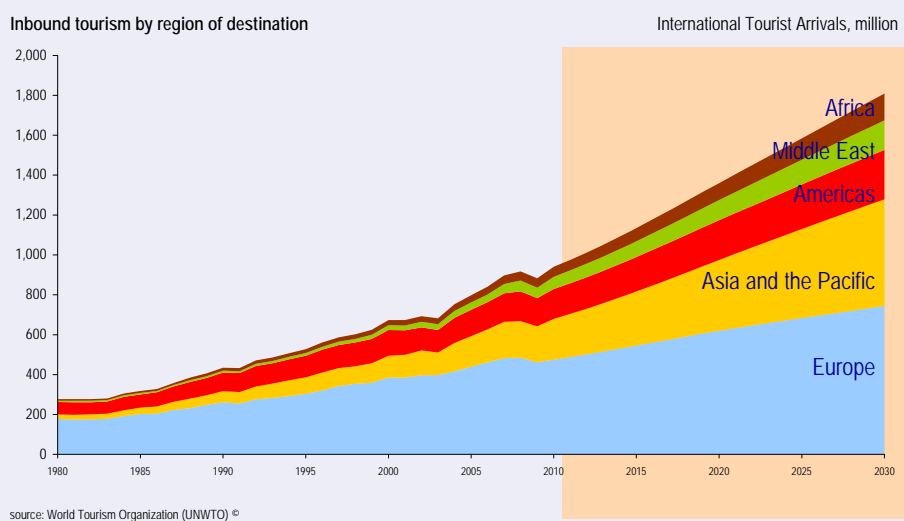
Diversification

- Tourism development, like society and economy overall, is characterised by ever increasing diversification and sophistication
 - of destinations
 - of source markets
 - of products
 - of segments
- tap emerging markets
- China boom
- shift from service to experience
- need for upgrade and regeneration of existing offer
- develop products, markets, segments that complement current ones
- also intensified competition

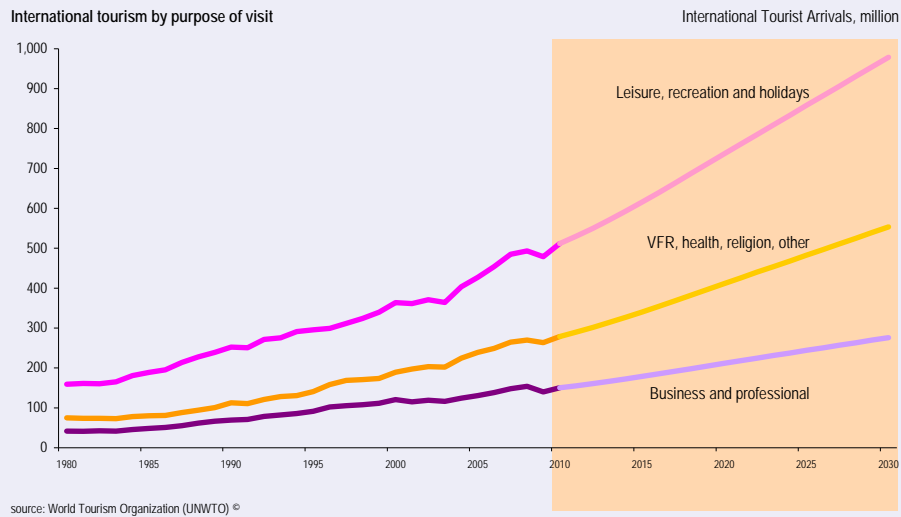
Emerging economy destinations to surpass advanced destinations in 2015



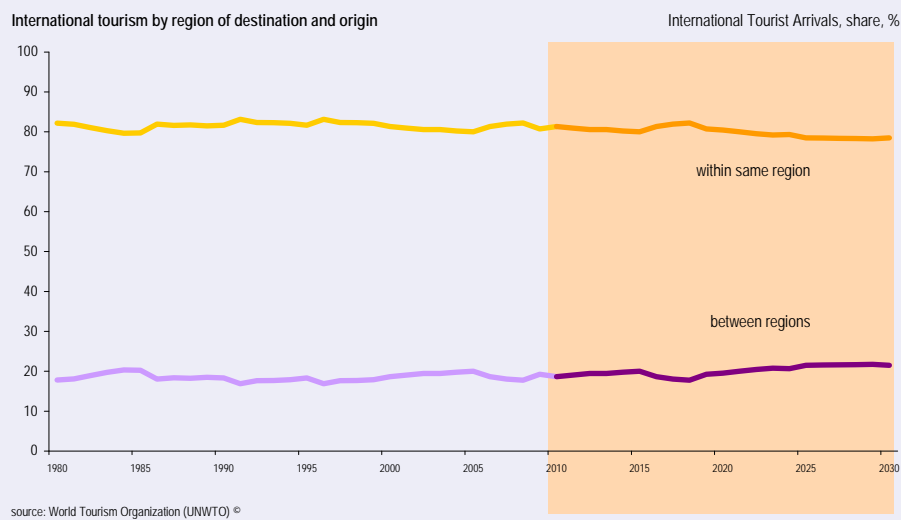
Asia and the Pacific will gain most of the new arrivals



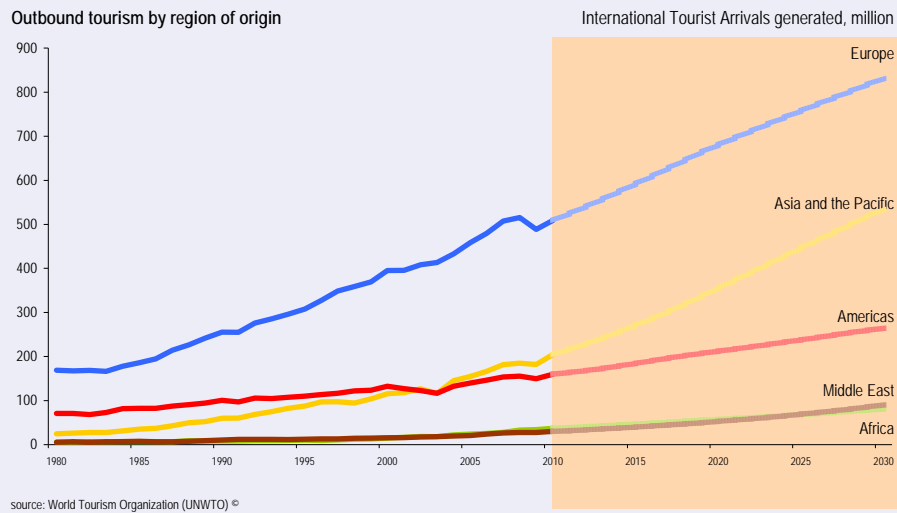
No major change in share by purpose of visit



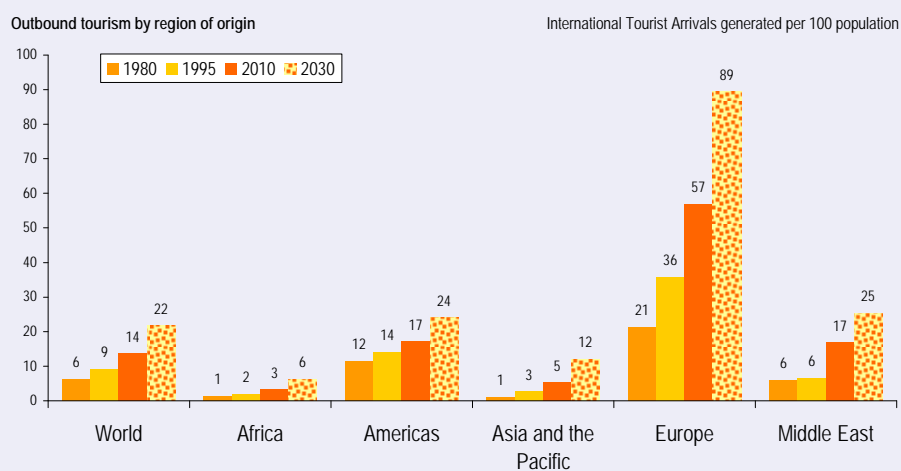
Travel between regions continues to grow slightly faster than within the same region



Asia and the Pacific will also be the outbound region that grows most



Europe generates most arrivals relative to population, while Africa is still low





Americas: growth in international tourism to continue at close to 3% a year on average

International Tourism, Americas

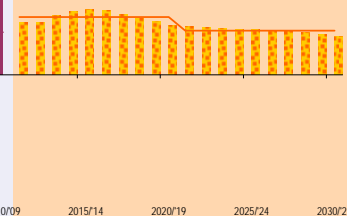


International tourist arrivals, % change over previous year

Average growth 2010-2030
2.6% a year

2010-2020
2.9% a year

2020-2030
2.2% a year

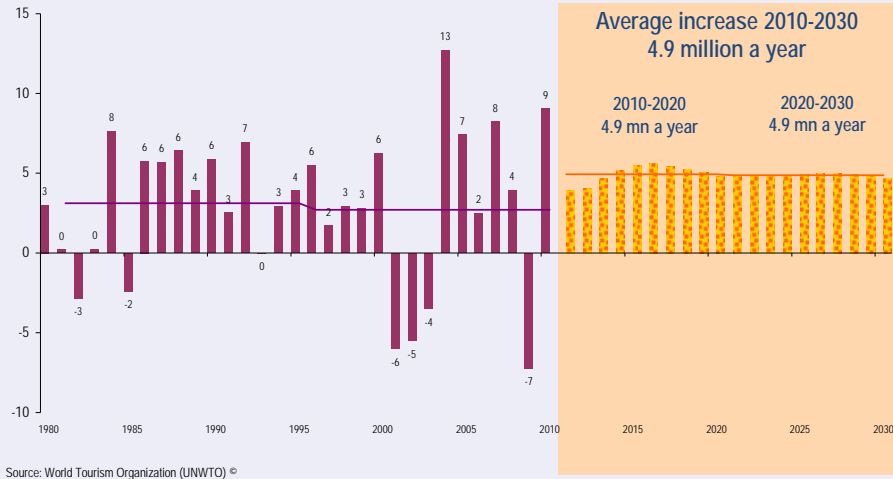


Source: World Tourism Organization (UNWTO) ©

Americas: International tourist arrivals to increase by 5 million a year on average

International Tourism, Americas

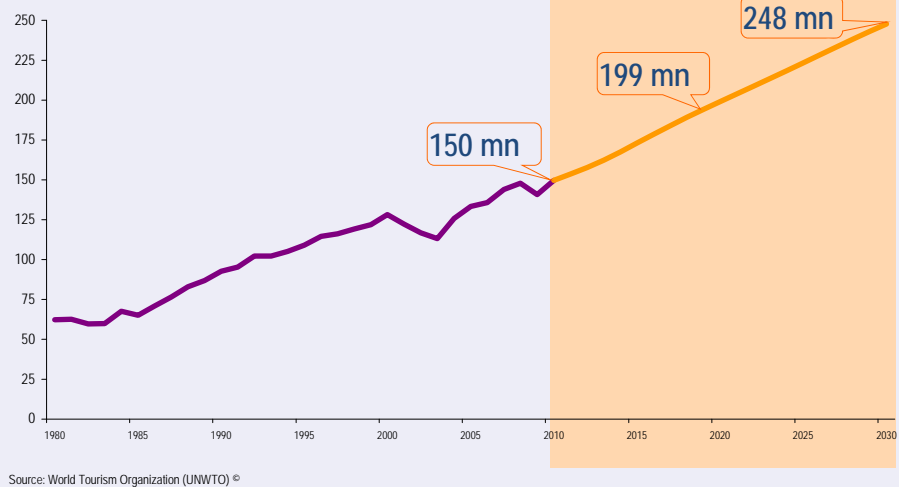
International tourist arrivals, absolute change over previous year, million



Americas: International tourist arrivals to grow from 150 mn to 248 mn

International Tourism, Americas

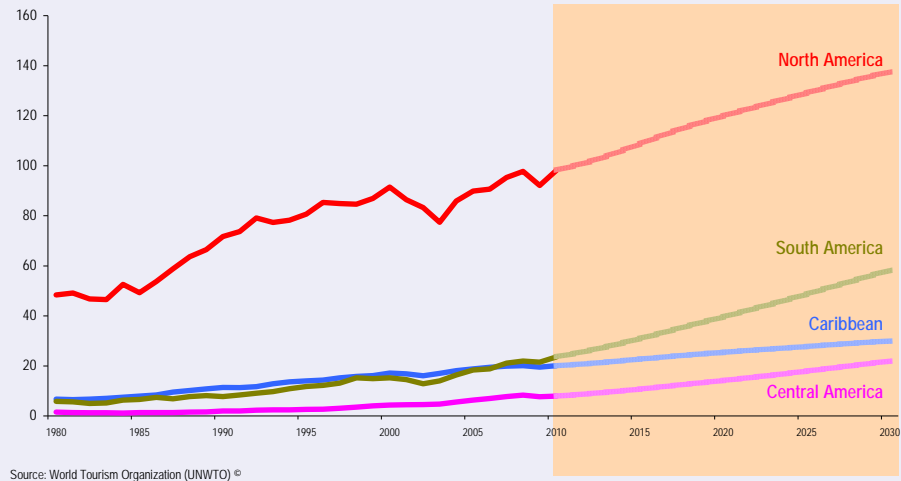
International Tourist Arrivals, million



Americas by subregion

Americas: Inbound tourism by subregion of destination

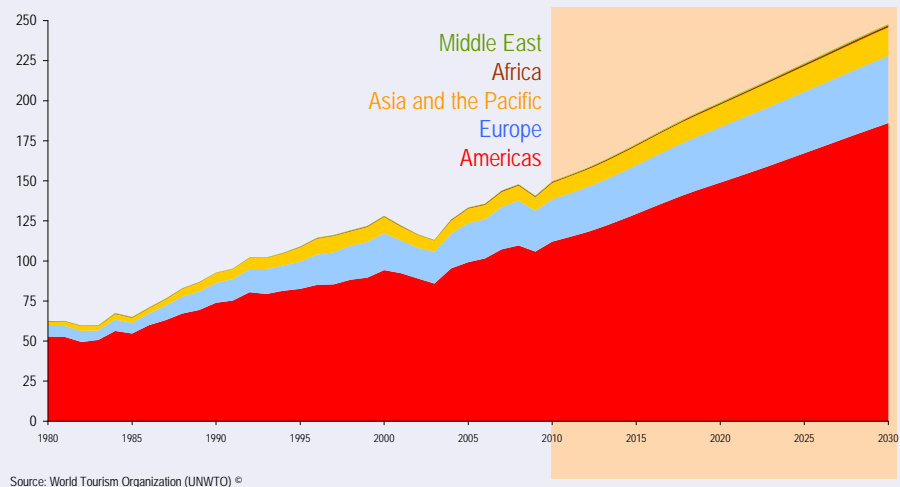
International Tourist Arrivals, million



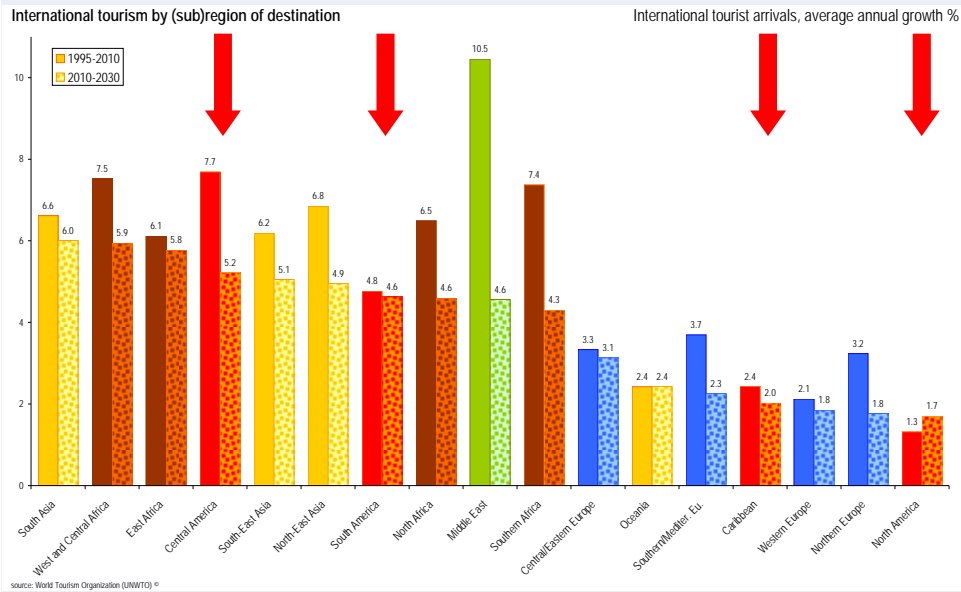
Americas: intraregional and interregional arrivals grow at about same rate

Americas: Inbound tourism by region of origin

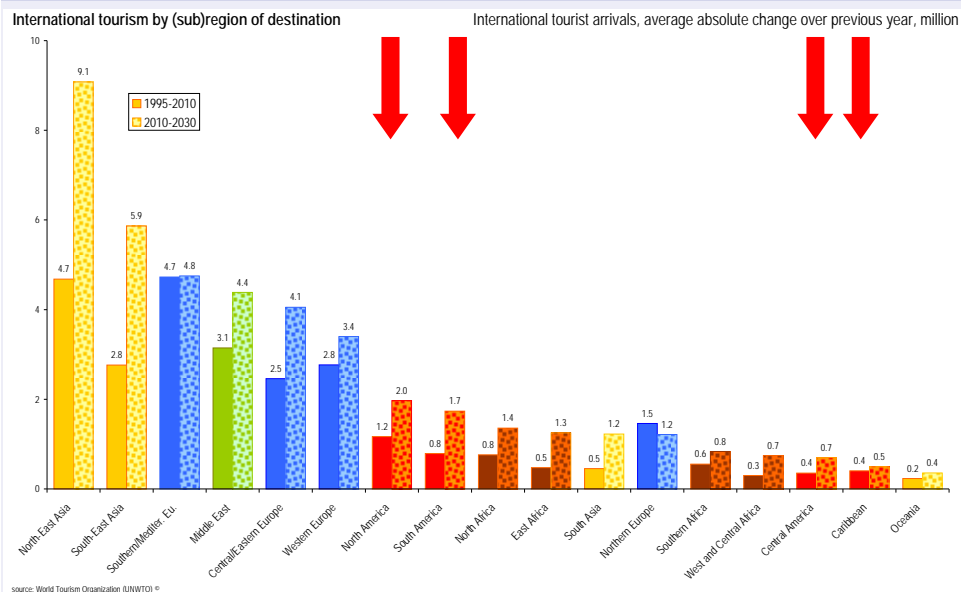
International Tourist Arrivals, million



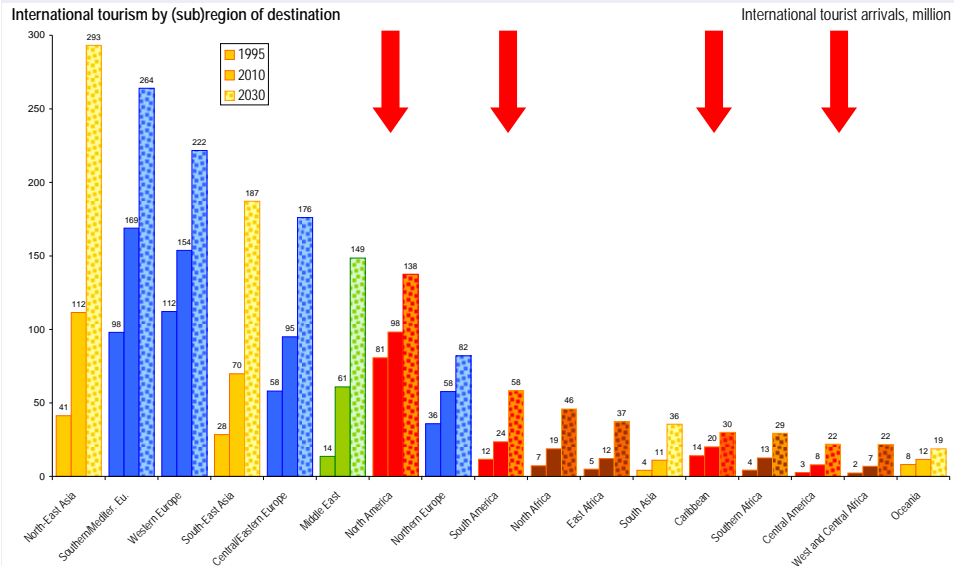
South Asia subregion with fastest growth (%), in Americas Central and South America



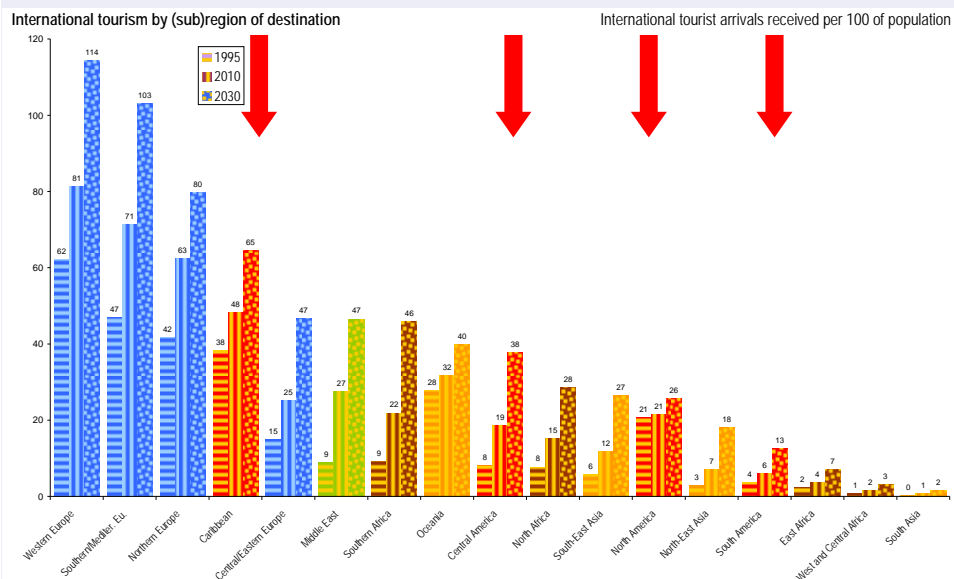
NE Asia subregion with fastest growth (abs.)



North-East Asia will be the most visited subregion in 2030



Europe continues to lead in international arrivals received per 100 of population





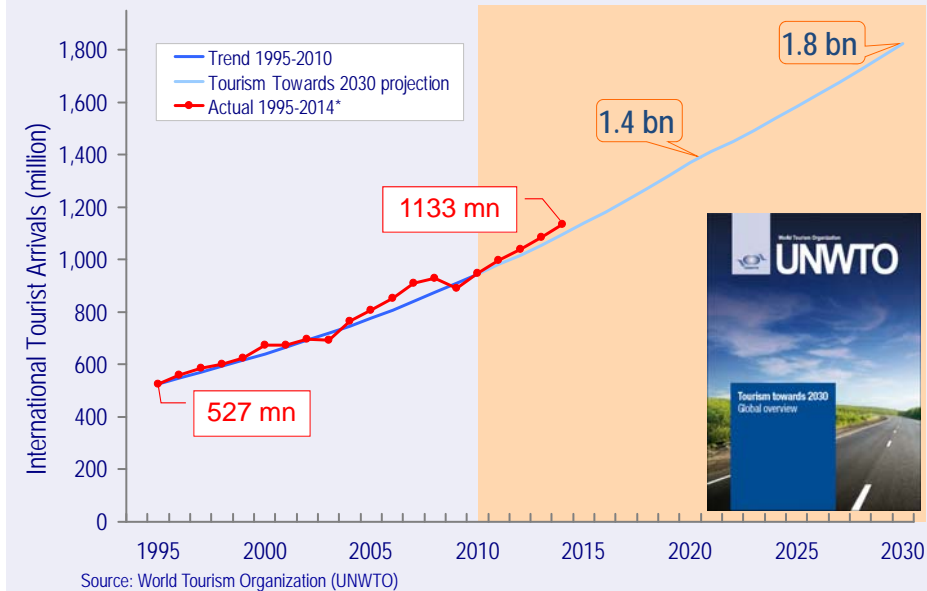
Round-up

Tourism Towards 2030 in one page

- *Tourism Towards 2030* shows that there is still a great potential for further expansion in coming decades
- Emerging as well as established destinations can benefit from this trend and opportunity, **provided they shape the adequate conditions and policies** with regard to business environment, infrastructure, facilitation, marketing and human resources
- Along with opportunities, challenges also arise in maximising social and economic benefits and minimising negative impacts

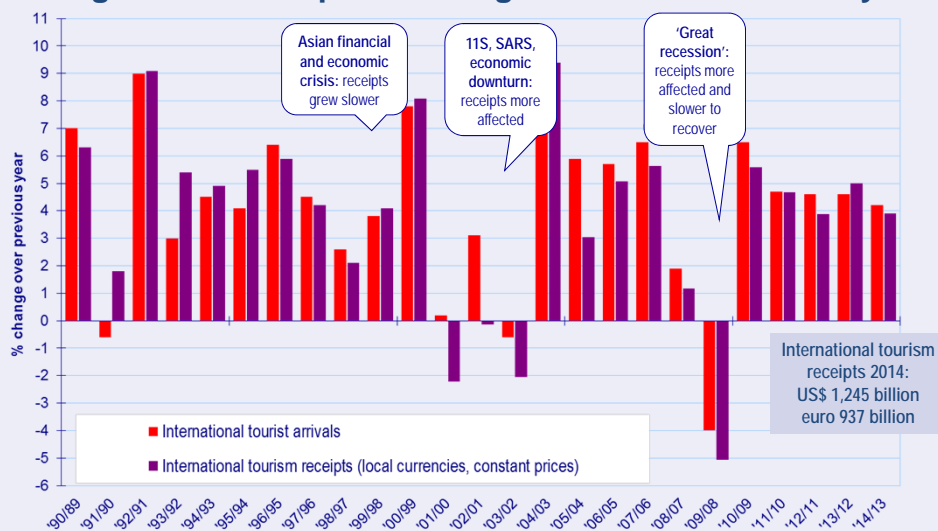
Long-term tourism growth pattern: more moderate, sustainable and inclusive

Actual Trend vs. Tourism Towards 2030 projection World



International Tourism Arrivals and Receipts, World

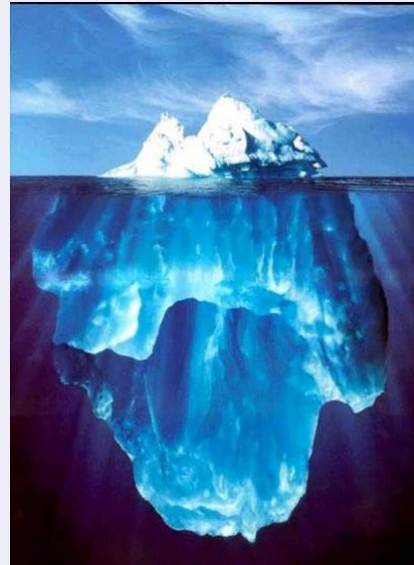
growth in receipts follows growth in arrivals closely



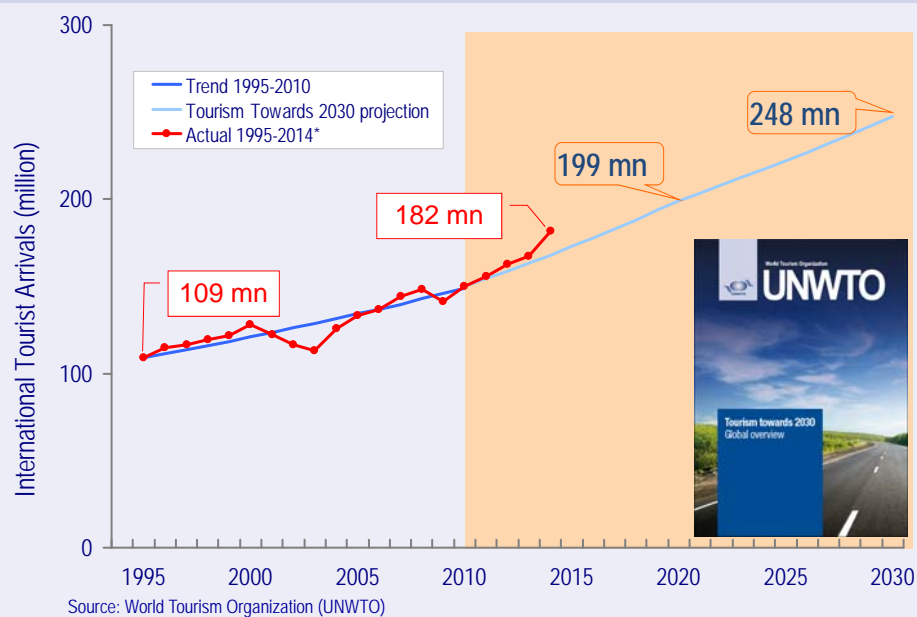
Source: World Tourism Organization (UNWTO)

International tourism is
just the tip of the iceberg

Domestic tourism is
5-6 times bigger



Actual Trend vs. Tourism Towards 2030 projection Americas



Americas: how to make it possible

Opportunities

- natural resources
- cultural resources
- human resources
- price competitiveness
- authenticity, newness and dynamism
- all seasons at the same moment (North and South)
- dynamic emerging intraregional markets
- economic integration, trade agreements

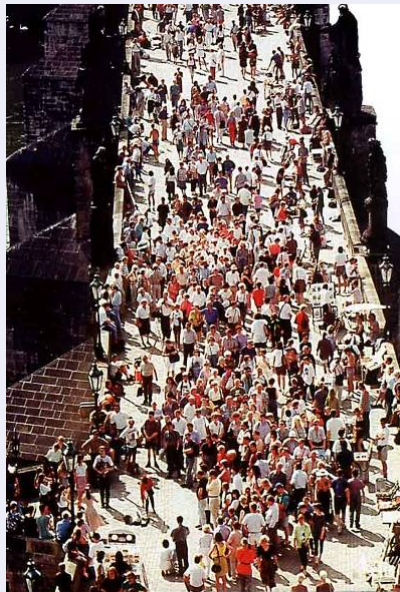
Challenges

- infrastructure development, connectivity
- sustainability / greening
- further product dev'ment and diversification of markets and segments
- innovation
- planning & attracting investment
- safety and security
- further extension of travel facilitation
- quality
- marketing and promotion: image building, branding, e-marketing
- complacency
- revitalisation of aging supply
- coordination, cooperation, collaboration

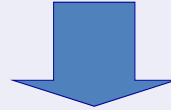
Americas towards 2030

5

million
additional
international tourist
arrivals
on average a year of
the 43 million
worldwide



Continuous expansion of tourism



Increasing pressure on the environment of tourism destinations, global impacts

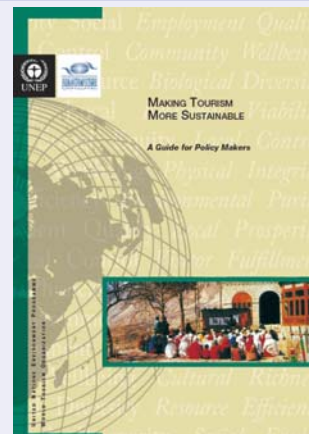


Need for the sustainable development of the tourism sector

Sustainable tourism

Expressed simply, sustainable tourism can be defined as:

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



Reference: *Making Tourism More Sustainable - A Guide for Policy Makers*, UNEP and UNWTO, 2005, p.11-12,
www.unep.fr/scp/publications/details.asp?id=DTI/0592/PA

Sustainable tourism

Thus, sustainable tourism should:

- 1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- 3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

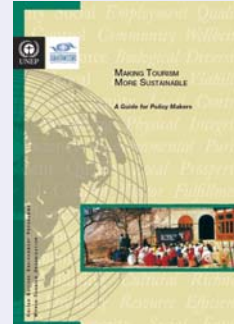
Sustainable tourism

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.

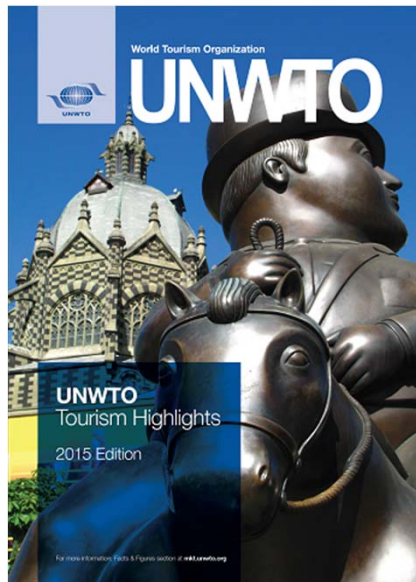
Sustainable tourism should also maintain a high level of tourist satisfaction and **ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices** amongst them.

Instruments for making tourism more sustainable

- Command and control instruments (e.g. laws, regulations)
- Economic instruments
- Voluntary instruments (e.g. certification)
- Supporting instruments (e.g. capacity building, marketing)
- Monitoring instruments => indicators (basic tools that also support the use of other policy instruments)



Main achievements



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

Results 2014

International tourist arrivals
1133 million
+4.3%

International tourism receipts
(BOP Travel)
US\$ 1245 billion (euro 937 bn)
+3.7% (real terms)

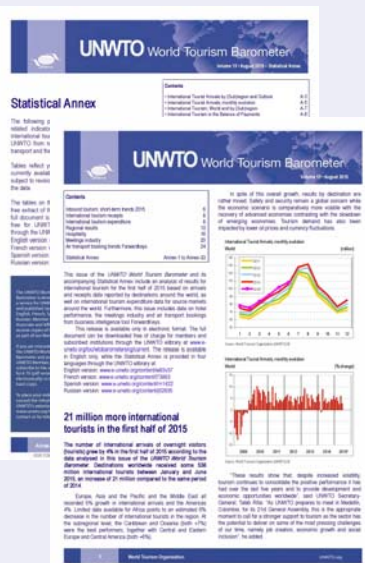
+
International passenger transport
(BOP Transport, passenger)
US\$ 221 billion (euro 161 bn)

www.unwto.org/facts

UNWTO - a Specialized Agency of the United Nations



Current trends



UNWTO World Tourism Barometer

Objective: monitoring short-term evolution of worldwide tourism

Frequency: 6 times a year

- Analysis in English
- Statistical Annex in En, Fr, Sp, Ru

Permanent elements:

- Short term tourism data
 - Key indicators international tourism
 - Third party industry data
- UNWTO Panel of Tourism Experts
- Short-term forecast
- Economic data relevant for tourism

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

Tourism Market Trends programme



Marketing Handbooks

Forthcoming:
Key performance indicators
Health and medical tourism

Where to find information prepared by UNWTO?

UNWTO

Affiliate Membership:

Facts & Figures

Publications

- electronic: => UNWTO eLibrary www.e-unwto.org
- hardcopy: => UNWTO Infoshop <http://pub.unwto.org> (and depositary libraries)
- statistics online www.e-unwto.org/toc/unwtotfb/current

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