UNWTO – WTCF
CITY TOURISM PERFORMANCE RESEARCH
1. OBJECTIVES:

- Create a platform to exchange information, experience and expertise among leading urban destinations across the globe;
- Provide an instrument to benchmark and develop indicators for measuring performance;
- Collect data and showcase good practices as well addressing the current and future challenges;
- **Key Performance Areas (KPAs):**
  - Destination Management
  - Economic Perspective
  - Social & Cultural Perspective
  - Environmental Perspective
  - Technology & New Business Models
## METHODOLOGY: KEY PERFORMANCE AREAS (KPAS)

<table>
<thead>
<tr>
<th>Key Performance Area</th>
<th>Definition</th>
<th>Selected criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination Management</strong></td>
<td>Includes visitor and DMO perspective</td>
<td>• Destination governance &amp; management criteria</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Visitor satisfaction criteria</td>
</tr>
<tr>
<td><strong>Economic Perspective</strong></td>
<td>Related to economic criteria and value of growth</td>
<td>• Tourism flows</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Economic impact of tourism at destination</td>
</tr>
<tr>
<td><strong>Social and Cultural</strong></td>
<td>Social and cultural impacts of tourism</td>
<td>• Cultural resources (tangible and/or intangible)</td>
</tr>
<tr>
<td><strong>Perspective</strong></td>
<td></td>
<td>• Social impacts of tourism</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Community attitude and engagement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Safety &amp; security (crime rates)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Authenticity</td>
</tr>
<tr>
<td><strong>Environmental Perspective</strong></td>
<td>Sustainability and environmental criteria</td>
<td>• Sustainable tourism strategy &amp; regulations (recycling, energy saving, air and water quality etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Mobility</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Public green spaces</td>
</tr>
<tr>
<td><strong>Technology &amp; New</strong></td>
<td>Technology use at the destination regarding the governance, transportation</td>
<td>• Smart city</td>
</tr>
<tr>
<td><strong>Business Models</strong></td>
<td>and innovation related criteria</td>
<td>• Open data</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• New Platform Tourism Services (so-called Sharing Economy)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Internet</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Public transport (mobility)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Innovative products and services</td>
</tr>
</tbody>
</table>
2. METHODOLOGY and EXPECTED OUTPUT:

- In situ interviews by selected experts with the DMOs & related stakeholders
- Reports with empirical data & observations of the experts
- 2 Technical workshops
  - Tianjin (China)
  - Buenos Aires (Argentina)
- Publication with the summary of reports
- Recommendations for the city DMOs
- Online platform with case studies
<table>
<thead>
<tr>
<th>CITIES</th>
<th>KPAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Antwerp</td>
<td>Destination Management, Social and Cultural Perspective, Technology</td>
</tr>
<tr>
<td>2. Berlin</td>
<td>Destination Management, Economic Perspective, Environmental Perspective</td>
</tr>
<tr>
<td>3. Beijing</td>
<td>Destination Management, Economic Perspective</td>
</tr>
<tr>
<td>4. Bogotá</td>
<td>Destination Management, Social and Cultural Perspective</td>
</tr>
<tr>
<td>6. Cape Town</td>
<td>Destination Management, Social and Cultural Perspective, Environmental Perspective</td>
</tr>
<tr>
<td>7. Copenhagen</td>
<td>Environmental Perspective</td>
</tr>
<tr>
<td>8. Hangzhou</td>
<td>Social and Cultural Perspective</td>
</tr>
</tbody>
</table>
## KEY PERFORMANCE AREAS (KPAS)

<table>
<thead>
<tr>
<th>CITIES</th>
<th>KPAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Linz</td>
<td>Destination Management, Social and Cultural Perspective</td>
</tr>
<tr>
<td>10. Marrakech</td>
<td>Destination Management, Social and Cultural Perspective</td>
</tr>
<tr>
<td>11. Sapporo</td>
<td>Innovation, Technology and New Business Models</td>
</tr>
<tr>
<td>12. Seoul</td>
<td>Environmental Perspective, Innovation and Technology</td>
</tr>
<tr>
<td>13. Tianjin</td>
<td>Destination Management, Economic Perspective</td>
</tr>
<tr>
<td>14. Tokyo</td>
<td>Economic Perspective</td>
</tr>
<tr>
<td>15. Turin</td>
<td>Destination Management, Economic Perspective</td>
</tr>
</tbody>
</table>
## 1. ANTWERP (BELGIUM)

### STRENGTHS:

- Connectivity
- Well organized transport network and infrastructure
- Efficient governance model and structure (vertical /horizontal coordination)
- Long term strategic planning
- Integrated marketing approach
- Positive local community approach and engagement
- Tourism sector involved in urban development and planning
- Quality management (regulations and monitoring practices)
- Efficient IT use
- Authenticity
- Accessibility and social inclusiveness
- Environmental sustainability monitored (congestion management, public space, energy efficiency, greenhouse gas emission, etc.)
2. BEIJING (CHINA)

STRENGTHS:

- Rich cultural heritage - well protected
- Steady growth in demand and revenue (domestic and international markets)
- Connectivity (new airport 2019)
- Urban public transport
- Diversified accommodation
- Culinary experience (diverse gastronomy as an attraction)
- Government and management structure under Municipal Government and Tourism
- Commission - multi agency effort
- Strategic planning (5 year development plan, policy measures and action plans - tourism is a priority)
- Introduction of sustainable tourism initiatives in the plan
- The structure allows for an integrated approach for tourism development and vertical and horizontal coordination with the stakeholders at city level (resource deployment, zoning, business development, promotion & marketing, legislation and regulations, quality management, safety and security, training)
- (2016-2020) Institutional reform - DMO to be put in place
- Strong and systematic government support (land allocation, taxation, finance, infrastructure, public services, SME support, incentives for innovation,
3. BERLIN (GERMANY)

**STRENGTHS:**

- Tourism benefits from other important sectors (life sciences, transportation, IT, media and music, advertising & design, biotechnology, environmental services, construction, e-commerce, retail, etc.).
- Advanced transport infrastructure and potential for connectivity
- Diversified accommodation
- Diversified urban tourism products
- Strong brand identity (place brand)
- Efficient governance model and strong horizontal / vertical PPP
- Sustainable practices reflected in marketing efforts
- High economic impact of tourism
- Highly developed meetings industry (demand/supply)
- Visitor satisfaction monitoring
- Market intelligence
4. BOGOTÁ (COLOMBIA)

**STRENGTHS:**

- Tourism is the second export industry (after oil)
- Connectivity at regional level
- Cultural tourism is the key priority
- Environmental friendly urban mobility, e.g. bicycle routes
- Hinterland use- for complementary attractions and nature based tourism
- Gastronomy tourism
- Potential for business tourism and meetings industry
- Unique selling point: product diversity and local people
- Public incentives (e.g. tax exemption) helps accommodation capacity to grow
- DMO (IDT) is a public authority with specific legal status, administrative and financial autonomy- collaborated with the private stakeholders- in charge of product development, promotion and marketing
- A comprehensive strategic and action tourism plan (2017-2020) focuses on innovation, inclusiveness, smart tourism, authenticity, sustainability and quality
- Quality management procedures put in place: e.g. certification
5. BUENOS AIRES (ARGENTINA)

STRENGTHS:

- High economic impact of tourism
- Steady and strong growth of demand
- Great potential for the meetings industry (regional & international)
- Strong demand from the LGTB market (no 1 destination in the region)
- Shopping tourism
- Health and wellness tourism
- Efficient DMO structure (public but in good collaboration with the private partners)
- Long term strategic destination management plan
- Efficient use of digital platforms and social media
- Visitor satisfaction monitoring
- Market intelligence
- Initiatives put in place for local community engagement
- Initiatives put in place to improve safety & security
- Authenticity & unique selling point
- Local initiatives to enhance environmental sustainability
- Connectivity
- Smart city initiatives
6. CAPE TOWN (SOUTH AFRICA)

<table>
<thead>
<tr>
<th>STRENGTHS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Rich and diversified natural, cultural resources</td>
</tr>
<tr>
<td>• Multicultural character as a competitive factor</td>
</tr>
<tr>
<td>• Well developed tourism infrastructure</td>
</tr>
<tr>
<td>• Well developed transport network</td>
</tr>
<tr>
<td>• High professionalism in the tourism industry</td>
</tr>
<tr>
<td>• Diversified tourism products for different market segments</td>
</tr>
<tr>
<td>• Strong and steady growth in tourism demand</td>
</tr>
<tr>
<td>• Efficient DMO structure (PPP)</td>
</tr>
</tbody>
</table>

| • Strategic plan involves a long term policy and vision, monitored and updated regularly |
| • A legal framework and action plans for sustainable growth and management (including climate change issues, energy efficiency and inclusiveness) |
| • Visitor satisfaction monitored |
| • Institutional support to SMEs |
| • Research is key |
| • Innovation in promotion and marketing |
| • Community involvement and authenticity – key competitive factors |
7. COPENHAGEN (DENMARK)

**STRENGTHS:**

- Economic power and competitiveness (40% GDP, 85% foreign investment, 75% employment)
- “Sustainable City” brand is a competitive advantage in promotion and marketing
- Ambitious climate policy - first carbon neutral capital
- Environmental friendly urban mobility - extensive bicycle use and routes
- Well developed public transport infrastructure
- Cruise destination
- City DMO: Efficient vertical coordination with the DMO at national level
- City brand is based on: architecture and design, sustainable city, healthy food, tolerance, small scale big city
- Revised strategic plan with new objectives (sustainable and livable city, smart city, professionalism and talent development, local resident involvement in decision making)
- Sustainable practices: e.g. Eco-certificate in accommodation, organic food, environmental friendly urban mobility
8. HANGZHOU (CHINA)

STRENGTHS:

- Tourism is a priority on the urban policy agenda
- Steady growth in arrivals and revenue
- Diversified and highly developed tourism attractions and accommodation
- Significant historical, cultural character (main competitive advantage)
- Relaxing life style, “story telling of living culture” (competitive advantage in the marketplace)
- Innovation in tourism product
- Its destination brand promises the experience
- Tourism product is diversified to meet leisure, events (sports, cultural events, fairs and exhibitions) and business tourism
- No seasonality issue
- Major local community involvement
- Authenticity
9. LINZ (AUSTRIA)

STRENGTHS:

- Industry and commerce supports the economic advantage of tourism
- Cultural development plan
- High quality of life for the local community improves the tourism image
- Smart city and innovative “hard product development- space for art, culture, etc.
- Connectivity
- Transformation from an industrial urban area to a tourism destination (spatial and image wise)
- European Capital of Culture (2009) was a critical factor for transformation local community engagement, internationalization and innovation
- UNESCO-City of Media Arts (2014) improved the image and positioning – visionary and progressive city
- Stable DMO structure – minimized risk of budgetary and legal issues
- Innovative soft product development and tourism lab.
- Strong and steady tourism growth
## 10. MARRAKECH (MORROCCO)

### STRENGTHS:

- Diverse attractions and tourism types (cultural tourism, golf, wellness, meetings)
- Tourism is given the priority in the regional development program for economic growth and competitiveness
- The development plan and the urban plan both set out strategic objectives for: i) authenticity, ii) diversification of economic activities and sectorial plans, iii) local community benefits
- Initiatives for a sustainable, smart and competitive city are put in place
- Adequate capacity for hosting business tourism and meetings
- National, regional and international profile cultural events create a competitive advantage
- Incentives and training is provided to enhance SMEs and particularly local crafts
- Governance structure is quite decentralized and the private sector is highly represented
- Tourism observatory at national level helps to monitor data at local level
11. SAPPORO (JAPAN)

STRENGTHS:

- Urban Tourism combined with mountain tourism
- Rich natural /cultural resources/attractions
- Well developed infrastructure for mega-events
- Environmental friendly public space allocation
- Efficient public transport
- Academic institutions contribute to research and the enhancement of IT use in tourism (PPAP)
- Monitoring mechanisms put in place to measure the impact on environment
- Smart initiatives launched for visitor information
## 12. SEOUL (REPUBLIC OF KOREA)

<table>
<thead>
<tr>
<th>STRENGTHS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Rich and diversified natural and cultural resources (well protected)</td>
</tr>
<tr>
<td>• Urban hinterland is largely used for nature-based tourism; decentralization of attractions to avoid congestion and local community development</td>
</tr>
<tr>
<td>• Strong and steady growth in demand</td>
</tr>
<tr>
<td>• A careful balance between nature &amp; technology and ancient &amp; modern</td>
</tr>
<tr>
<td>• Connectivity and well developed public transport infrastructure</td>
</tr>
<tr>
<td>• Highly developed digital technology, digital social innovation, smart city both for the local residents and the visitors</td>
</tr>
<tr>
<td>• Urban planning and design aligns with tourism product development</td>
</tr>
<tr>
<td>• A strong global city brand e.g. city of design</td>
</tr>
<tr>
<td>• Culinary experience as a motivation for the customer</td>
</tr>
<tr>
<td>• Public investment in cultural heritage conservation and infrastructure, urban re-generation and pedestrian routes</td>
</tr>
<tr>
<td>• High potential for the Meetings Industry</td>
</tr>
<tr>
<td>• Authenticity is a priority in local tourism management</td>
</tr>
<tr>
<td>• Affirmative social inclusiveness policy in decision making process: gender equality, involvement of elderly, disabled, traditional merchants, foreigners, small businesses, art circles, etc.</td>
</tr>
<tr>
<td>• Safety and security</td>
</tr>
</tbody>
</table>
13. TIANJIN (CHINA)

STRENGTHS:

- Connectivity - railway and cruise (regional and national level)
- Rich natural and cultural resources,
- Diverse accommodation facilities and complementary activities
- High potential to develop meetings industry (in terms of demand and supply)
- Source market for domestic and international tourism - social profile and economic potential
- Strong domestic market

- Strategic plan (2016-2020) focuses on developing products for cultural tourism, rural tourism and industrial tourism - business tourism needs to be included)
- Initiatives on environmental and cultural heritage improvement
14. TOKYO (JAPAN)

**STRENGTHS:**

- One of the largest metropolitan areas with a very high GDP, cultural interaction, livability, environment and connectivity
- Combination of diversified traditional attractions with ultra modern, innovative and smart products/attractions
- High tech and efficient transport infrastructure (national, regional and international)
- Successful crisis management strategy
- No seasonality issue
- Relevant market intelligence-used for strategy
- Growing business tourism and meetings industry
- Tourism generates a substantial number of jobs at local level
- Quality assessment in governance
15. TURIN (ITALY)

STRENGTHS:

- Strategic plan for tourism development
- Tourism has had a huge impact regarding the transformation process: (from industrial city to tourism destination)
- Physical/spatial
- Cultural
- Innovative
- Efficient governance/management structure (PPP)
- Improved quality of life of local inhabitants (spatial, economic and social re-generation) through tourism
- Differentiation: Unique selling point
- Cultural heritage and architecture
- Enogastronomy
- Industrial heritage
- Innovation
- Resources and attractions are fully used
MAJOR CHALLENGES:

1. Lack of relevant quantitative and qualitative data (comparable) at city level;
2. Lack of adequate tools to measure data at tourism sub-sector level and to set monitoring mechanisms for the impact of actions and initiatives;
3. Environmental issues related to the city (not necessarily caused by tourism) and inadequate data to measure the impact. e.g.
   - Congestion
   - Public space
   - Energy efficiency
   - Greenhouse emission reduction
   - Air quality
   - Landscape and bio diversity protection
4. Mobility performance (urban public transport);
MAJOR CHALLENGES:

5. Connectivity (needs to be diversified – alternative modes and infrastructure;
6. Lack of SME support;
7. Tourism is not included in the urban growth policies;
8. Need for product diversification;
9. Improvement of the “city brand "by including the community concept;
10. Need for improved public amenities and services;
11. Seasonality;
12. Lack of “quality management systems” at urban destination level:
13. Limited quality accommodation capacity to meet the demand;
14. Need to develop responsible cruise tourism;
15. Ensure on-going innovation and creativity;
MAJOR CHALLENGES:

16. Lack of long-term political stability;
17. Safety and security;
18. Price competitiveness;
19. Lack of legal framework for “new digital platforms” (so-called sharing economy);
20. Long-term marketing strategy;
21. Congestion and carrying capacity issues caused by tourism;
22. Social reaction to immediate inconveniences: cultural issues - overuse of public amenities, visitor-resident tension, competition for space, crime, etc;
23. Detrimental effects: “tourism can destroy tourism”, turistification and erosion of quality visitor experience;
24. Authenticity;
25. Need for more flexible governance/management structures.
NEW PLATFORM TOURISM SERVICES
(OR THE SO-CALLED SHARING ECONOMY)

OBJECTIVES:

• Assess the relevance and impact of the so-called ‘sharing economy’ worldwide

• Identify the various issues it raises and how are these issues being addressed by destinations

• Pinpoint the opportunities and challenges at stake

• Contribute to the way forward regarding how to adapt to the new situation
NEW PLATFORM TOURISM SERVICES
(OR THE SO-CALLED SHARING ECONOMY)

METHODOLOGY:

• Data collection from December 2016 to March 2017
• UNWTO Member states, Affiliate Members and a selection of cities were invited to participate in an online survey
• 114 answers submitted from all around the world
NEW PLATFORM TOURISM SERVICES
(OR THE SO-CALLED SHARING ECONOMY)

RESULTS:

• An initial discussion paper was prepared and shared alongside the survey

• The preliminary results were presented during an event at ITB Berlin 2017

• The final report: at the 22nd Session of the UNWTO General Assembly in Chengdu, China
NEW PLATFORM TOURISM SERVICES
(OR THE SO-CALLED SHARING ECONOMY)

RESULTS:

KEY PILLARS TO BE ADDRESSED:

- Fair competition
- Consumer Protection
- Work Conditions
- Planning and sustainability aspects
NEW PLATFORM TOURISM SERVICES
(OR THE SO-CALLED SHARING ECONOMY)

RESULTS:

3 MAIN DIRECTIONS:

Better understanding and monitoring of the phenomenon is needed to assess the market volume and structure. Regulation and protection measures need to be put in place to avoid risks for consumers, service providers (goods and services) and digital platforms.

4C Approach to be adopted:
- Communication
- Collaboration
- Cooperation
- Coordination

Stakeholders
Thank you

Esencan Terzibasoglu
Director
Destination Management & Quality

eterzibasoglu@unwto.org