



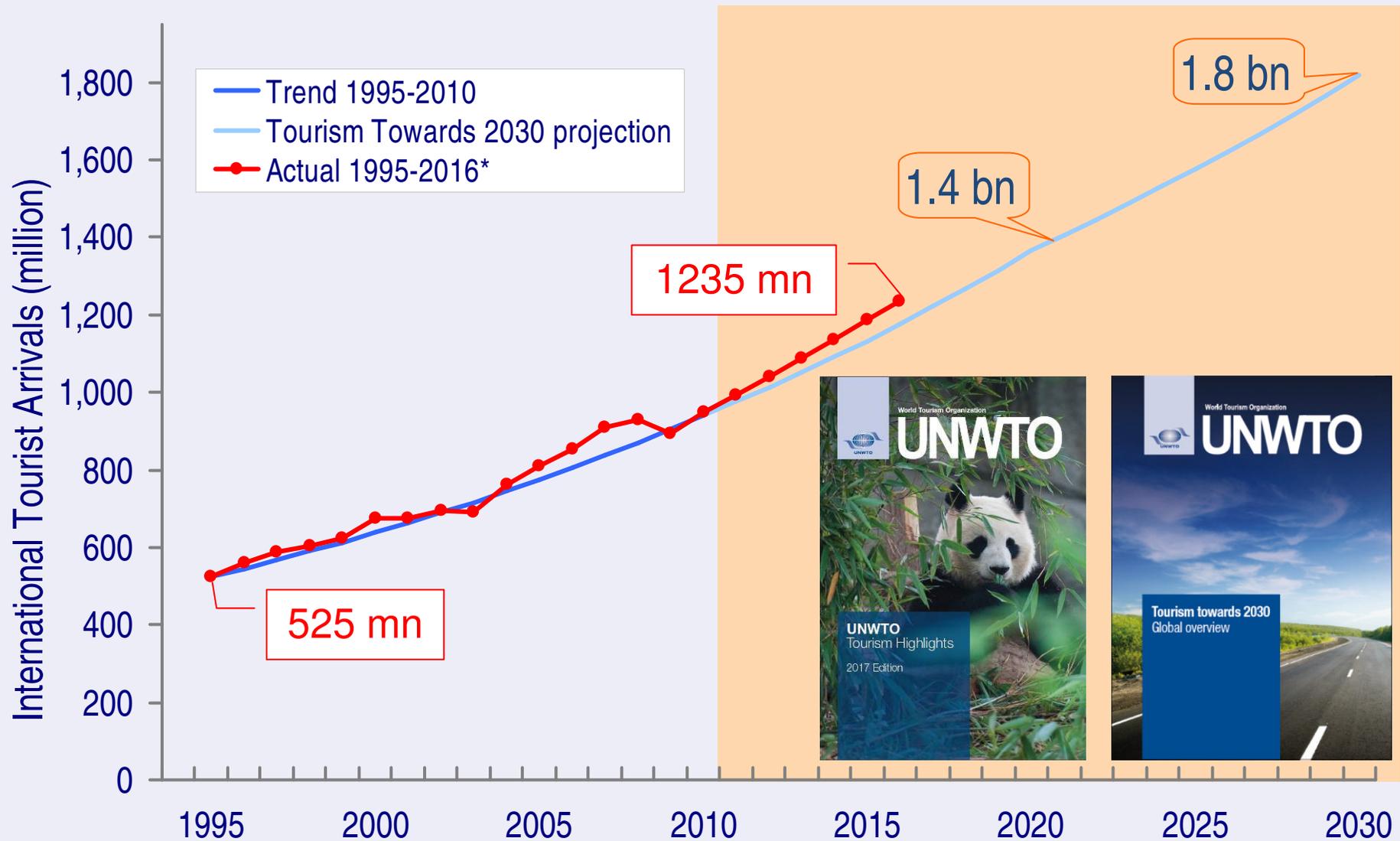
**22nd Session of the
UNWTO General Assembly**
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Special Session on Smart Tourism

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Policy Programme



Actual Trend vs. Tourism Towards 2030 projection World



Source: World Tourism Organization (UNWTO)

External factors continuously change the world and tourism

**STEEPLED analysis
(extension of PEST)**

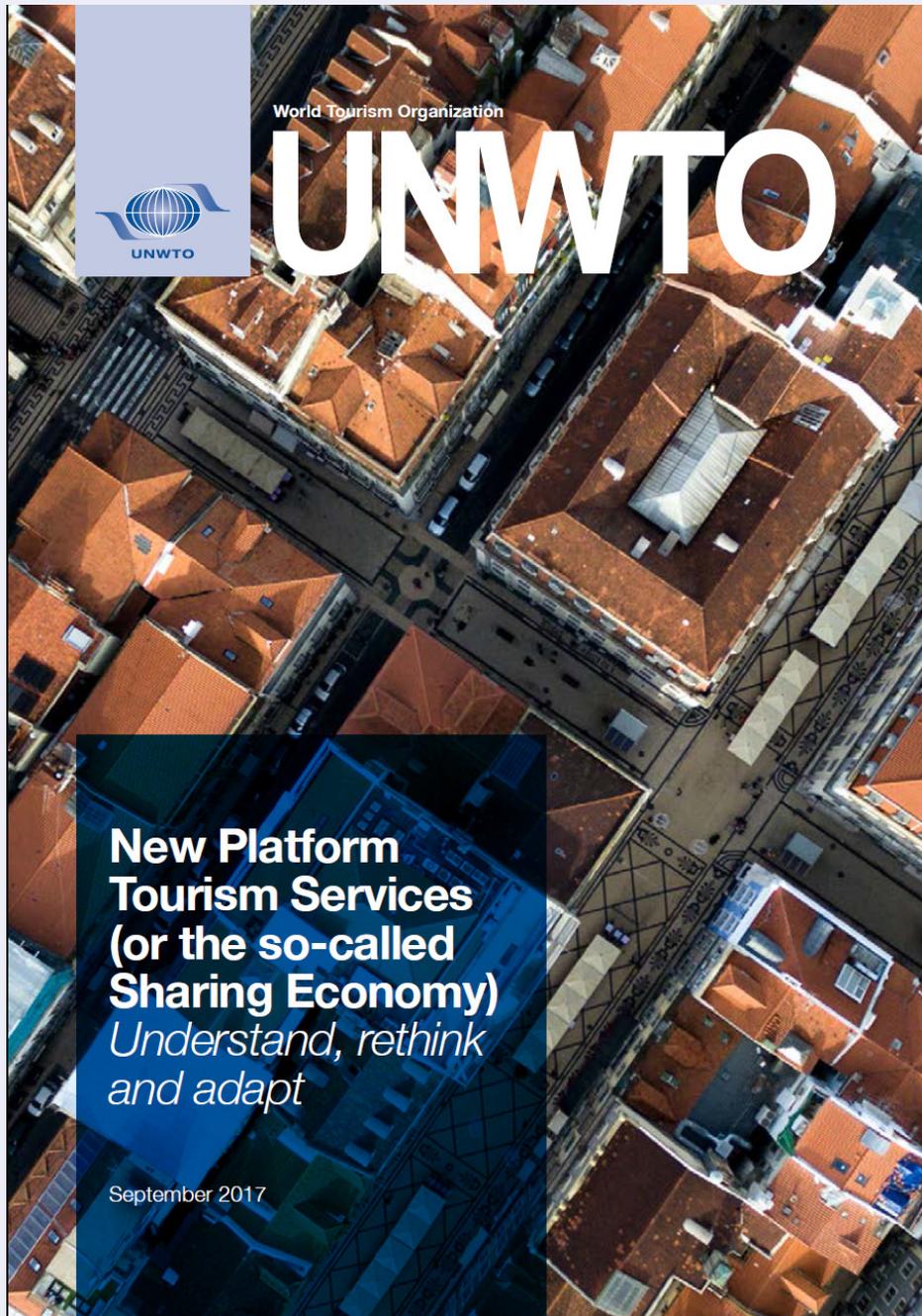


World, economy and tourism constantly changing

- **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

ICT: Connected world





UNWTO survey

- destinations, national and local; private sector, associations and academia
- all UNWTO regions
- questionnaire with both quantitative and qualitative questions
- 114 responses

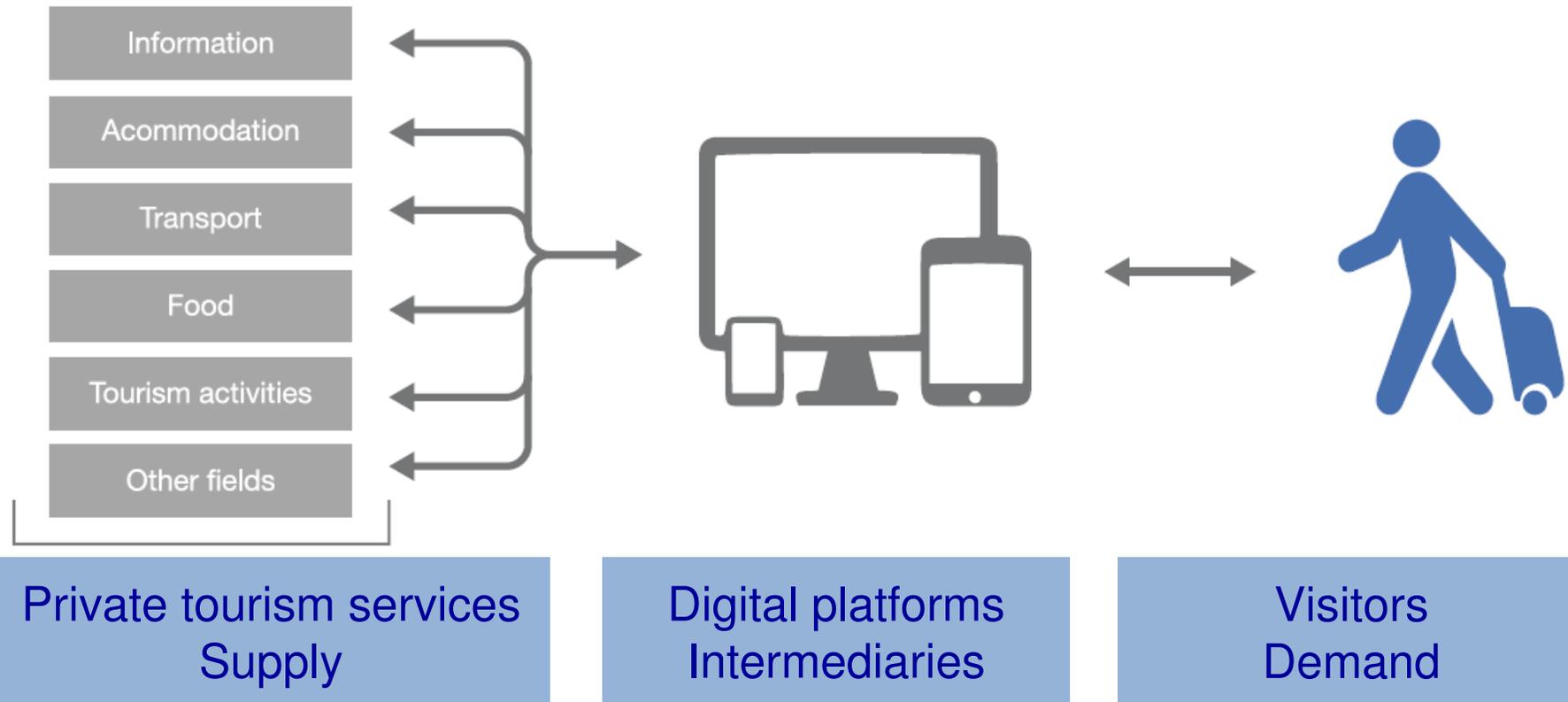
Covering:

- current and future effects
- opportunities and challenges
- governance issues

Available in UNWTO elibrary at;

www.e-unwto.org/doi/book/10.18111/9789284419081

New platform tourism services - stakeholders



Destinations NTA / NTO / DMO

Local communities

Traditional tourism businesses

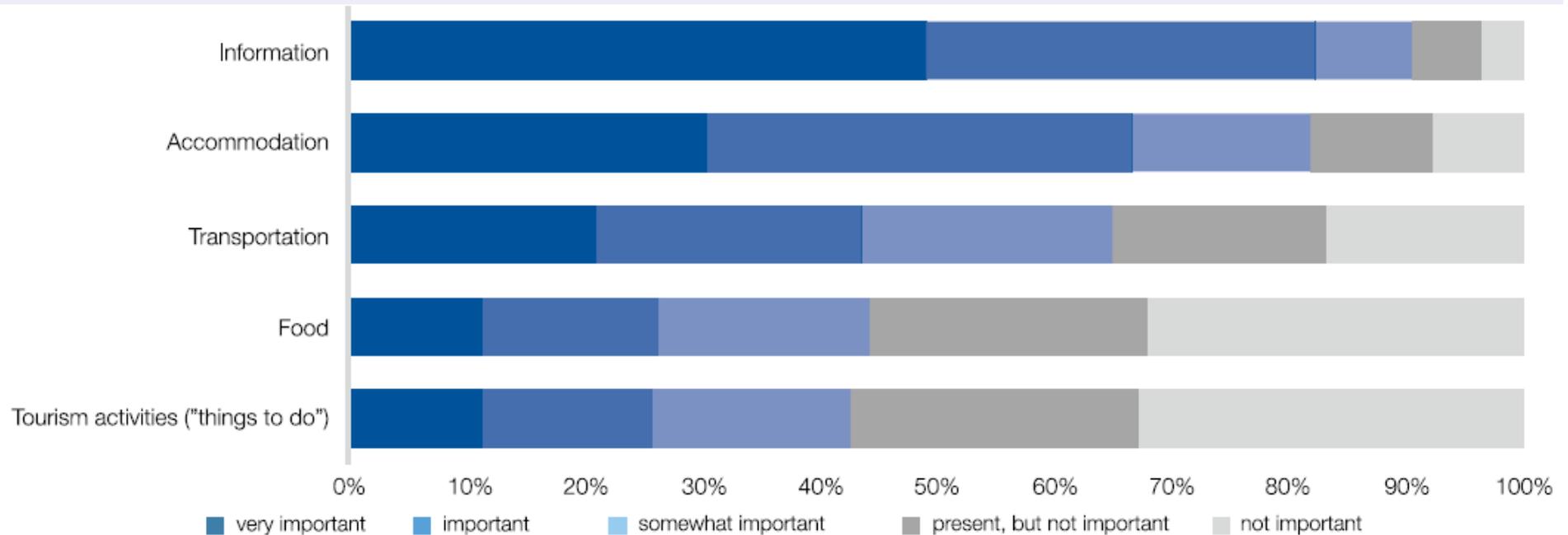
New platform tourism services: is it really *sharing*?

It is important to distinguish between:

- Services that **do not generate an economic benefit** beyond the recovery of costs and generally involve only occasional economic transactions, which can be considered as *true sharing*; and
- Services that **generate an economic benefit** beyond the recovery of costs and generally involve frequent or systematic transactions, which can be considered a *commercial activity by private persons or entities*.

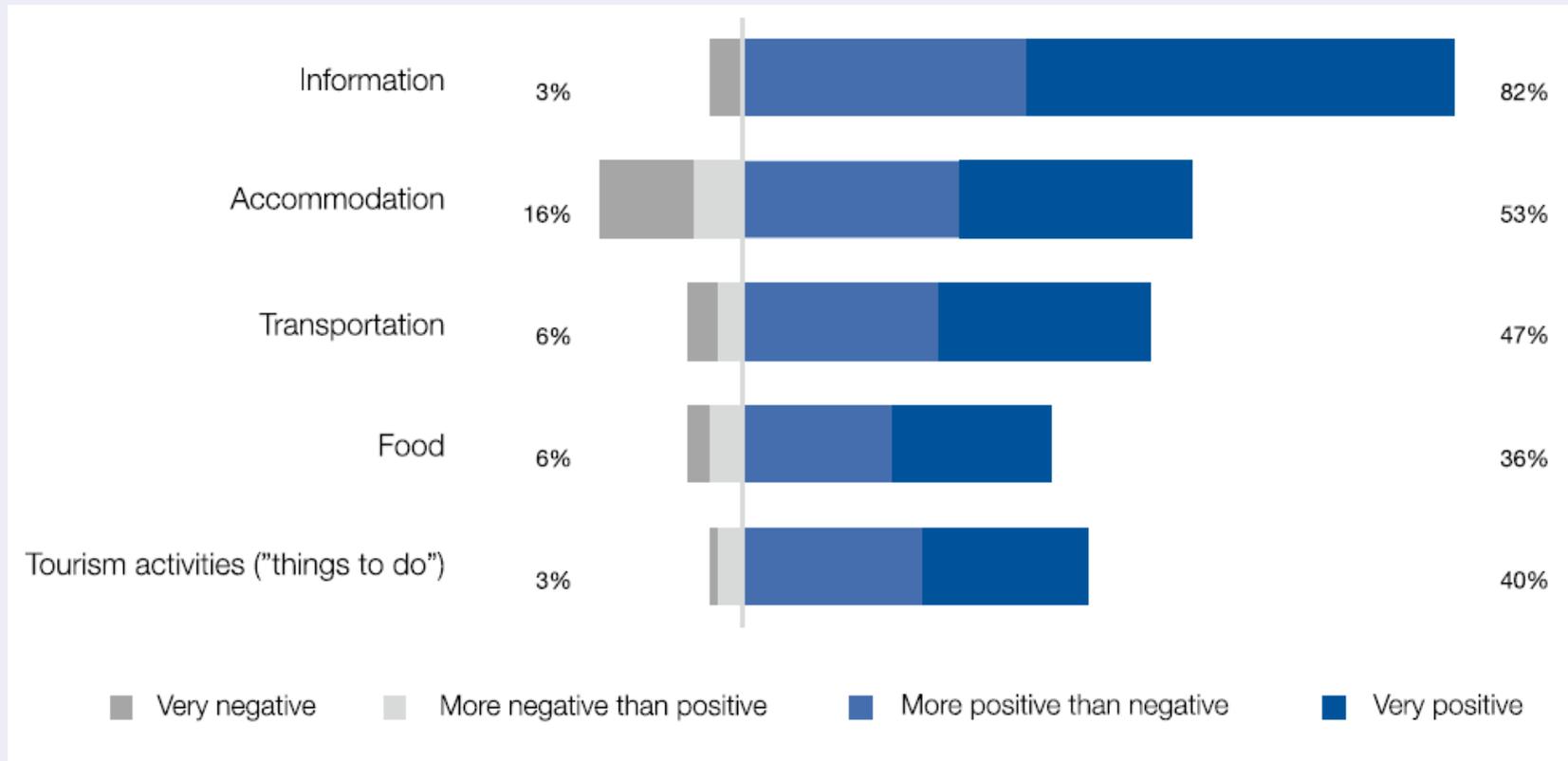
The latter generally works in the same way as a commercial business and should be treated as such. At the same time, it is important to acknowledge that this distinction is not always clear-cut in practice, as most platforms offer both *true sharing* and *commercial activities*.

Current importance of new platform tourism services



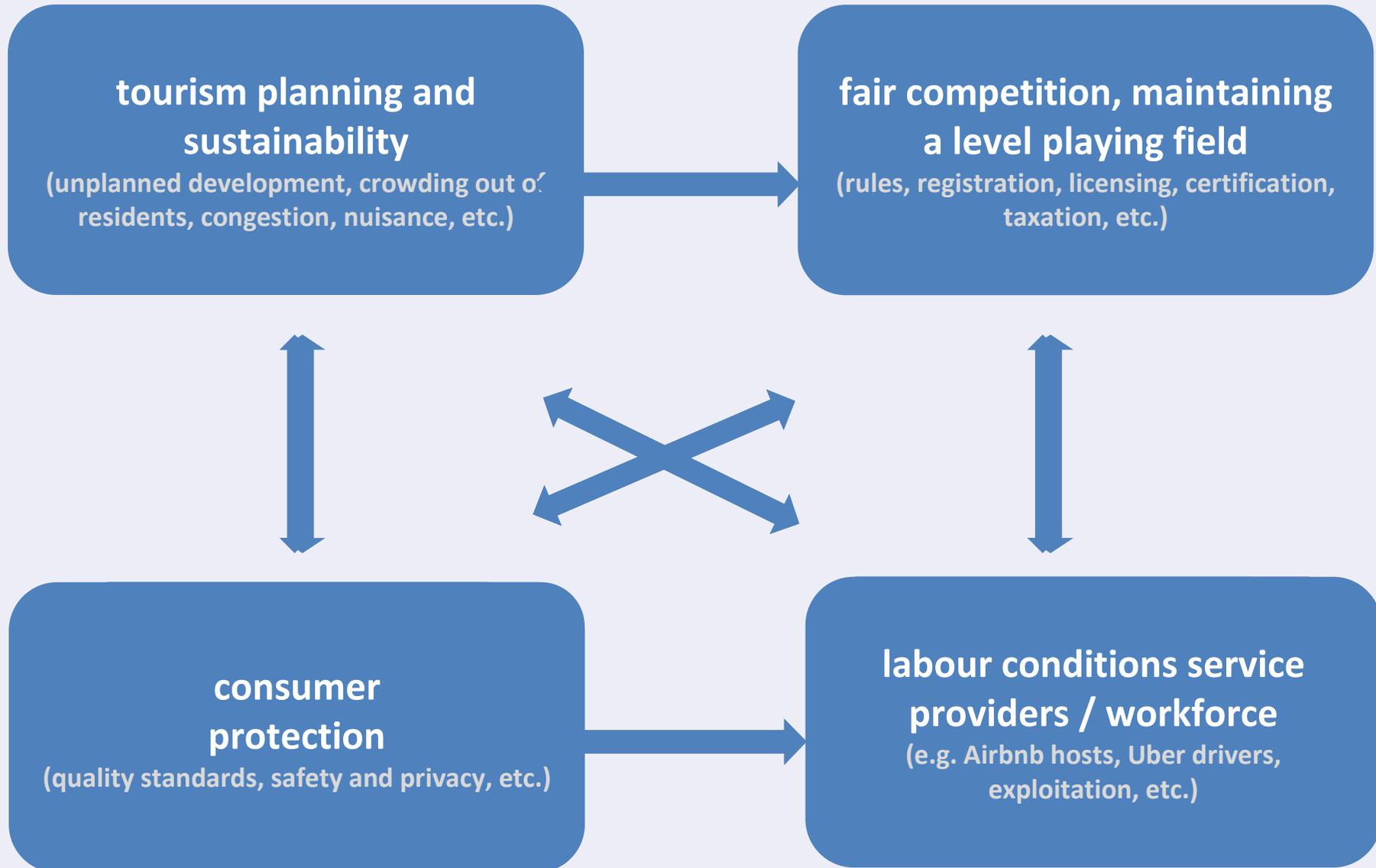
Survey question B1: How do you rate the current importance of private tourism services through digital platforms for your activity/destination?

Current impact of new platform tourism services

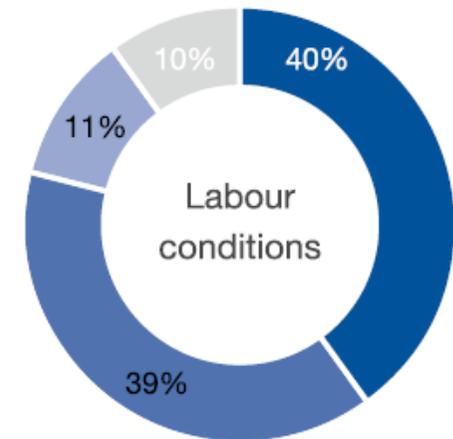
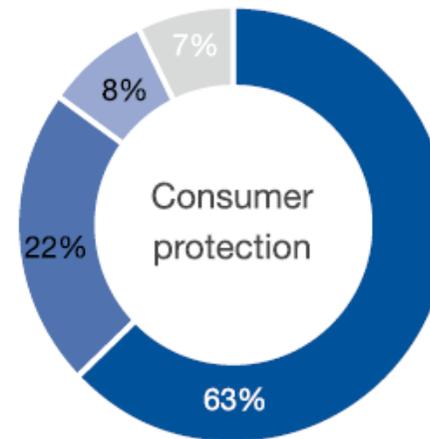
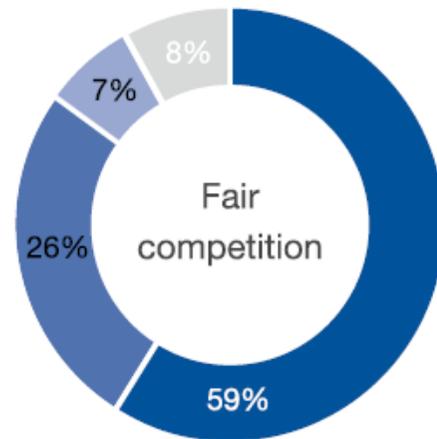
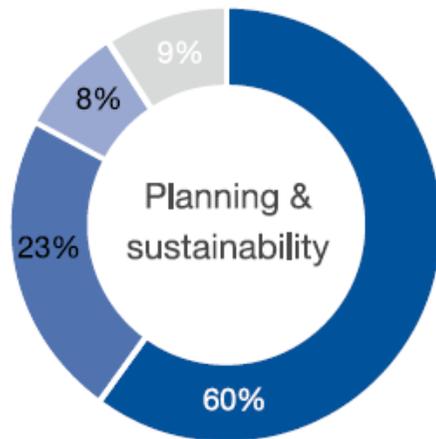


Survey questionD1: How do you rate the current overall impact of private tourism services through digital platforms for your destination/activity?

Governance

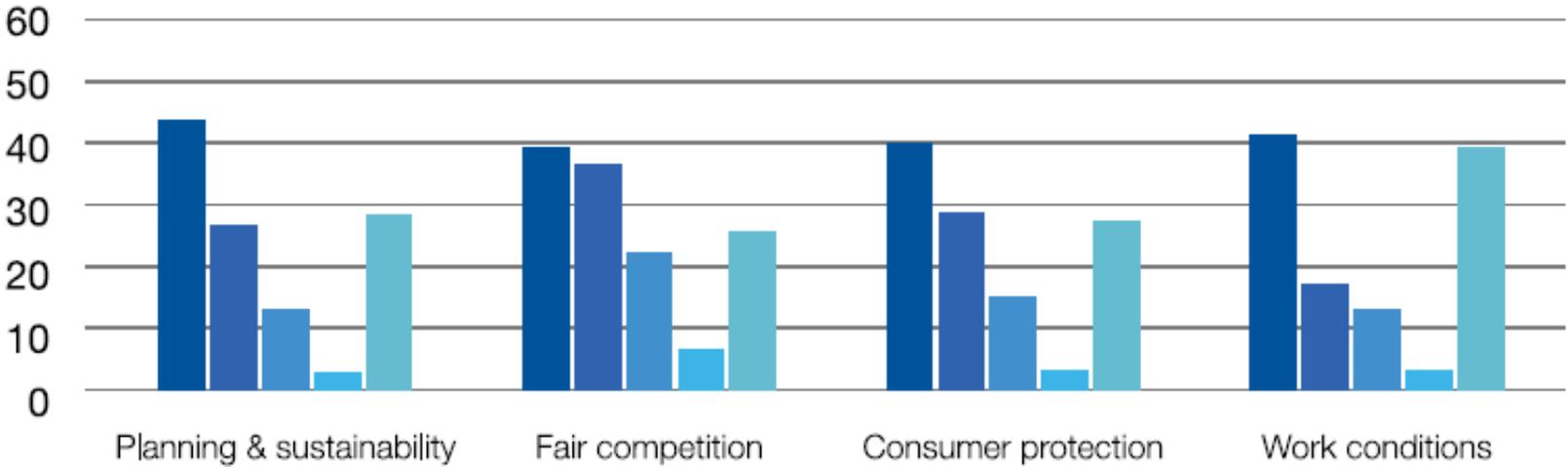


Importance of areas of governance



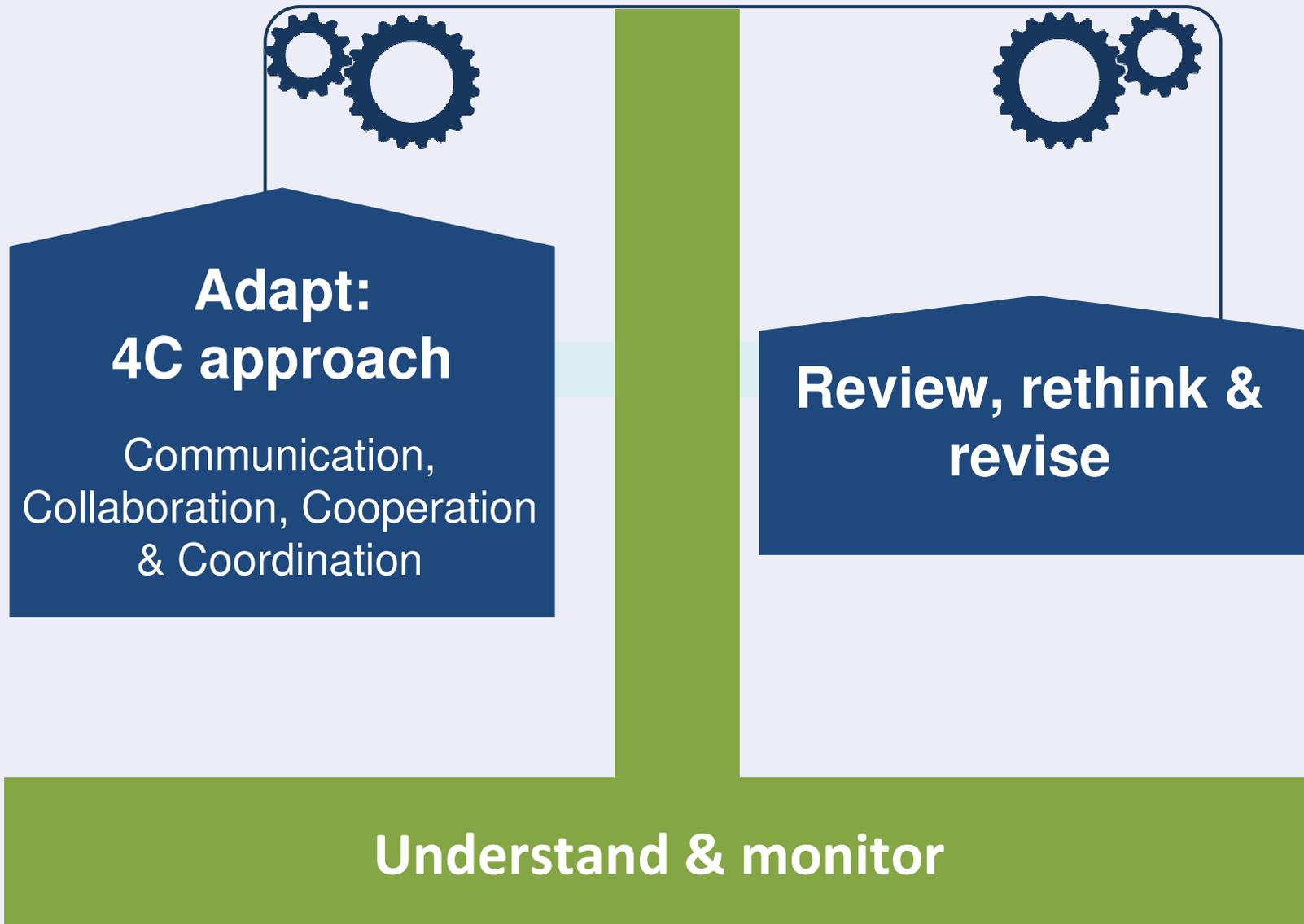
■ very important ■ important ■ somewhat important ■ not important/unable to answer

Area of governance: responses



■ Observing the situation ■ Planning/undertaking research ■ Adopted/enforced policies ■ Other actions ■ No action/unable to answer

The way forward



The way forward – no ‘one size fits all’

Understand & monitor

- Assess development of services through measurement and research to take informed and evidence based decisions
- Learn from other destinations and their experiences

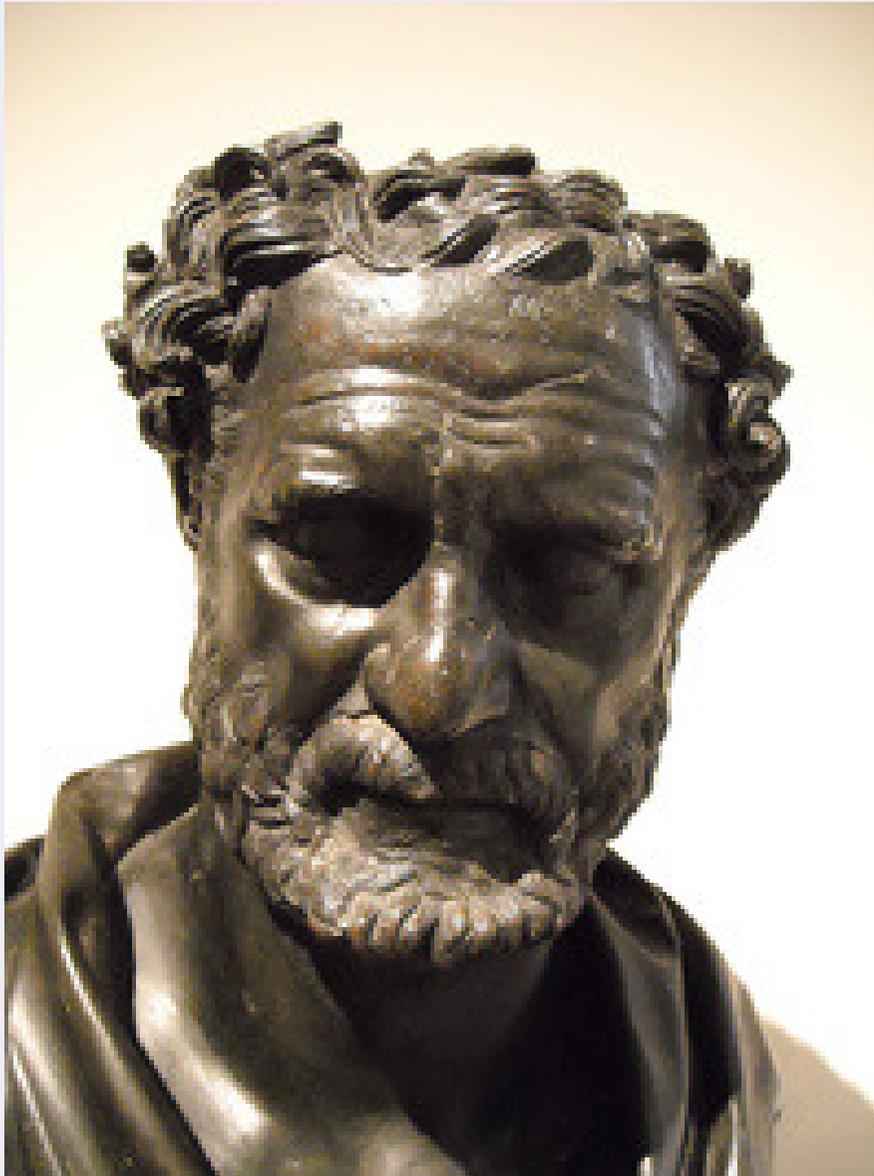
Adapting

- Dialog with all stakeholders (vitamin 4C: Communication, Collaboration, Cooperation and Coordination)
- Raise awareness of rules
- Engage 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)

Review, rethink and revise

- Recognise that traditions, policies and regulations differ widely by destination
- Address the interests of all stakeholders involved and affected
- Review and rethink current situation, policies and regulation
- adjust and revise smartly if needed and possible. i.e. tailored to the new situation and proportionate to the scale of operation
- Guarantee enforcement

‘The only thing that is constant is change’
Heraclitus, c. 535 - 475 BC



Thank you very much for
your attention!

John G.C. Kester

Statistics, Trends and Policy Programme

World Tourism Organization
(UNWTO)

www.unwto.org