UNDERSTANDING AND QUANTIFYING MOUNTAIN TOURISM

12th World Congress on Snow, Mountain and Wellness Tourism
Andorra, 20 March 2024
Mountains are home to around 1.1 billion people

Mountain tourism has become an increasingly relevant motivation for travel, from nature and open-air destinations to outdoors activities like walking, climbing and winter sports.

Mountains also attract visitors with their rich biodiversity and vibrant local cultures.

Many mountain destinations showed particular resilience during the pandemic.

Tourism has proved to be a lifeline for many communities in mountain regions and can play a leading role in protecting these fragile ecosystems.

However, quantifying its volume represents a challenge due to the lack of data.
The joint UN Tourism-FAO-Mountain Partnership (2023) study:

• Addresses the lack of current of relevant data and improves the understanding of mountain tourism

• Aims to provide an estimate of the share of mountain tourism in international tourism at global level and by region

• Identifies trends highlighting opportunities and challenges in mountain tourism

• Provides a set of recommendations to advance the measurement of mountain tourism, including the use of big data and new technologies
ESTIMATING THE SIZE OF MOUNTAIN TOURISM

• Methodological Approach
What is Mountain Tourism?

According to UN Tourism definition:

Mountain tourism is a type of “tourism activity which takes place in a defined and limited geographical space such as hills or mountains with distinctive characteristics and attributes that are inherent to a specific landscape, topography, climate, biodiversity (flora and fauna) and local community. It encompasses a broad range of outdoor leisure and sports activities.”

Source: Based on UN Tourism definition
Tourists are attracted to mountains for leisure reasons:

• Seeking the climate, the clean air, and uncrowded open spaces
• Enjoying beautiful, unspoilt and preserved sceneries
• Experiencing local traditions, and simple life-styles
• Practicing activities and sports that require steep slopes

Breaking down Mountain Tourism

A Landscape and topography
- Mountainous areas
- Mountain ranges and peaks
- Sightseeing spots / Attractions

B Climate and biodiversity
- Protected and sensitive areas (National Parks or similar)
- UNESCO World Heritage Sites
- Glaciers / Forests / Caves / Lakes / etc.

C Leisure and sports activities
- Hiking / Climbing / Adventure activities
- Skiing / Ski Mountaineering
- Nature / Cultural Discovery

Understanding and Quantifying Mountain Tourism
Identifying Mountain Destinations

Target destinations mountain tourism

- **Class 1.** elevation > 4,500 m
- **Class 2.** elevation 3,500 – 4,500 m
- **Class 3.** elevation 2,500 – 3,500 m
- **Class 4.** elevation 1,500 – 2,500 m and slope ≥ 2°
- **Class 5.** elevation 1,000 – 1,500 m and slope ≥ 5° or local elevation range [7 km radius] > 300 m
- **Classes 6 & 7.** elevation 300 – 1,000 m / local elevation range > 300 m
- Not classified

Countries by highest peaks

- 10% 9%
- 13% 18%
- 19%
- 24%
- 7%
- 19%
- 13%
- 10%

150 Countries

87% International Tourist Arrivals

Source: Based on FAO definition, CIA World Factbook
Mountain destinations around the world leverage the distinctive climate suitable for outdoors activities, but also the uniqueness of its biodiversity and high level of preservation.

- **Protected Areas** such as National Parks / Nature Reserves or similar are instruments that allow for a careful management of visitor flows in sensitive environments that combine nature preservation with tourism development of the destination.
Mountain tourism requires an active engagement of visitors to perform location-based activities that may require a certain degree of expertise or assistance (i.e. hiking, climbing, skiing, as well as adventure and adrenaline activities) vs. those that can be suitable for all audiences (i.e. nature, cultural and heritage sightseeing).

Their categorization into ‘standard’ or ‘extreme’ provides a framework to assess market sizes and to measure participation rates.
Tourism is globally divided between Leisure and Business tourism, and within Leisure motivation not all destinations provide a detailed breakdown of the motivations (to eventually include mountain tourism as a response to be properly monitored).

Leisure motivation (on the 55-60% range of tourists) includes mountain tourism and has a much lower share than coastal tourism that leads the demand but is relevant for destinations with renowned mountain ranges.
Estimating *Mountain Tourism* Share

**Inputs**
- Survey Responses
- Visitors to National Parks
- Visitors to Ski Resorts
- Tourism Statistics (Overnights, Visitors, etc.)
- Market Studies for Activities

**Market Share Estimates per Country**

- **International Tourist Arrivals**
  - Leisure

![Market Share Diagram](image)

- Less than 5%
- 5% to 10%
- 10% to 20%
- 20% to 40%
- 40% to 60%
- Over 60%

Understanding and Quantifying Mountain Tourism
Share of *Mountain Tourism* varies across countries

Countries grouped by the estimated share of mountain tourism in international tourist arrivals, 2019

<table>
<thead>
<tr>
<th>Less than 5%</th>
<th>5% to 10%</th>
<th>10% to 20%</th>
<th>20% to 40%</th>
<th>40% to 60%</th>
<th>More than 60%</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Salvador</td>
<td>Italy</td>
<td>Armenia</td>
<td>Chile</td>
<td><strong>Andorra</strong></td>
<td>Austria</td>
</tr>
<tr>
<td>Fiji</td>
<td>South Africa</td>
<td>Brazil</td>
<td>China</td>
<td>Nicaragua</td>
<td>Lesotho</td>
</tr>
<tr>
<td>Israel</td>
<td>Spain</td>
<td>Bulgaria</td>
<td>Ethiopia</td>
<td>Switzerland</td>
<td>Perú</td>
</tr>
<tr>
<td>Japan</td>
<td>Uganda</td>
<td>Czechia</td>
<td>Nepal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Korea, Republic of</td>
<td>Türkiye</td>
<td>Ecuador</td>
<td>Slovenia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mauritius</td>
<td></td>
<td>Finland</td>
<td>Venezuela</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Montenegro</td>
<td></td>
<td>Romania</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timor-Leste</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Desk research & Survey to UN Tourism members

Understanding and Quantifying Mountain Tourism
Estimated share of mountain tourism in international tourist arrivals by region (2019 data)

- **Americas**: 35 – 70 M, 9% to 17%
- **Europe**: 112 – 205 M, 9% to 17%
- **Asia Pacific**: 45 – 90 M, 8% to 17%
- **Middle East**: 2 – 5 M, 2% to 5%
- **Africa**: 4 – 8 M, 6% to 11%

Estimated share of mountain tourism in international tourist arrivals: 195 – 375 M, 9% to 16%

Source: UNWTO-FAO (2023), Understanding and Quantifying Mountain Tourism
UN Tourism survey to Members

• *Key Results*
Mountains are *all-year-round destinations* targeting both *international* and *domestic* tourists

Online survey launched to UN Tourism’s membership. Responses from 46 countries, accounting for 40% of International Tourist Arrivals.

What are the peak season(s) for mountain tourism in your country? *(single choice)*

- All-year-round: 19%
- Winter: 29%
- Summer: 52%

Are mountain tourists domestic and/or international? *(single choice)*

- Both Domestic and International: 10%
- Domestic: 30%
- International: 60%

*Source: Survey to UN Tourism members*
Most survey respondents are mountain destinations and underline the limitation or unavailability of data

What is the current stage of mountain tourism development in your country? (single choice)

- Country fits within the definition of mountain tourism: 91%
- Already an established destination: 11%
- An emerging destination: 7%
- Will draw attention in the near future: 41%
- Little room for development: 41%

Does your country count the number of visitors to mountain destinations for tourism purposes?

- Yes: 46%
- Yes, data limited: 14%
- No: 40%

Understanding and Quantifying Mountain Tourism

Source: Survey to UN Tourism members
What activity related with mountain tourism is predominant in your country? (multiple choice)

- Walking and Hiking
- Nature Tourism
- Rural Tourism
- Winter Sports
- Cultural Heritage
- Spiritual Tourism
- Other

Other include Birdwatching, adventure, climbing, mountaineering, gastronomy

What are the main purposes of mountain tourism in your destinations? (multiple choice)

- Generate economic revenues
- Create opportunities for local communities
- Create sustainable tourism products
- Protect natural and cultural heritage
- Spread tourism flows
- Complement tourism offer
- Other

Other include Address seasonality and structural changes

Source: Survey to UN Tourism members
What are the main challenges your country faces when developing & promoting mountain tourism?

- Adequate infrastructure
- Sustainability
- Product development
- Connectivity
- Public-private collaboration
- Policy support
- Carrying capacity
- Safety & Security protocols

Source: Survey to UN Tourism members

Adequate infrastructure, sustainability & product development are main challenges for mountain tourism
Key Conclusions from Survey

- Better measurement is needed to manage better.
- Measurement of tourism flows is key to spread tourism flows, share economic benefits and ensure preservation of cultural and natural heritage.
- Create tourism products related to gastronomy, nature, wellness or rural tourism.
- Promote domestic tourism in mountains.
- Provide experiences that cater for visitors’ needs and adapt to ever-changing consumer trends.
- Huge potential in emerging mountain destinations and also in more established ones.

Source: Survey to UN Tourism members
The Way Forward

• Case Studies
Using mobile positioning data to enhance measurement:

- Instituto Nacional de Estadística – Spain

Measurement of Tourists from the position of cell phones
(Instituto Nacional de Estadística – Spain)

New experimental data since July 2019 to track tourists (International & Domestic) allowing to quantify tourists in mountain municipalities.

Source: [https://www.ine.es/experimental/turismo_moviles/experimental_turismo_moviles.htm](https://www.ine.es/experimental/turismo_moviles/experimental_turismo_moviles.htm)
The UN Tourism International Network of Sustainable Tourism Observatories (INSTO) is a network of tourism observatories monitoring the economic, environmental, and social impact of tourism at the destination level.

Case study: South Tyrol (Italy)

- The South Tyrolean Observatory began its activities in early 2018 plays an important role in fostering the management and monitoring of sustainable tourism development in the region under 3 main areas (Economy, Society and Environment). South Tyrol is known for its mountain areas and natural landscapes covering 90% of the territory.

Example of Sustainable Tourism Indicators

Understanding and Quantifying Mountain Tourism

Source: https://sustainabletourism.eurac.edu/
Recommendations

- **Advance data** and **evidence-based tourism policies** and strategies in mountain areas to maximize the impact of tourism on employment and ensure social sustainability.
- **Invest in statistical systems** in line with the *International Recommendations of Tourism Statistics*.
- Explore the use of **mobile positioning data** to improve measurement.
- Enhance **market intelligence** to attract new segments and better understand consumer trends, and embrace the **digitalization** of the sector.
- Strengthen **public-private-community partnerships** to promote adequate measurement and monitoring.
- To identify the most important mountain destinations and support the **creation of specific mountain tourism observatories**.