WORLD’S TOP TOURISM SPENDERS
INTERNATIONAL TOURISM EXPENDITURE 2016

CHINA: 261 us$ billion (+12%)
USA: 124 us$ billion (+8%)
GERMANY: 81 us$ billion (+5%)
UK: 64 us$ billion (+14%)
FRANCE: 40 us$ billion (+3%)

WORLD’S TOP TOURISM EARNERS
INTERNATIONAL TOURISM RECEIPTS 2016

USA: 206 us$ billion
SPAIN: 60 us$ billion
THAILAND: 50 us$ billion
CHINA: 44 us$ billion
FRANCE: 42 us$ billion

© UNWTO 2017
## INTERNATIONAL TOURIST ARRIVALS BY COUNTRY

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>2015</th>
<th>2016</th>
<th>15/14</th>
<th>16/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>France</td>
<td>84.5</td>
<td>82.6</td>
<td>0.9</td>
<td>-2.2</td>
</tr>
<tr>
<td>2</td>
<td>USA</td>
<td>77.5</td>
<td>75.6</td>
<td>3.3</td>
<td>-2.4</td>
</tr>
<tr>
<td>3</td>
<td>Spain</td>
<td>68.5</td>
<td>75.6</td>
<td>5.5</td>
<td>10.3</td>
</tr>
<tr>
<td>4</td>
<td>China</td>
<td>56.9</td>
<td>59.3</td>
<td>2.3</td>
<td>4.2</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>50.7</td>
<td>52.4</td>
<td>4.4</td>
<td>3.2</td>
</tr>
<tr>
<td>6</td>
<td>UK</td>
<td>34.4</td>
<td>35.8</td>
<td>5.6</td>
<td>4.0</td>
</tr>
<tr>
<td>7</td>
<td>Germany</td>
<td>35.0</td>
<td>35.6</td>
<td>6.0</td>
<td>1.7</td>
</tr>
<tr>
<td>8</td>
<td>Mexico</td>
<td>32.1</td>
<td>35.0</td>
<td>9.4</td>
<td>8.9</td>
</tr>
<tr>
<td>9</td>
<td>Thailand</td>
<td>29.9</td>
<td>32.6</td>
<td>20.6</td>
<td>8.9</td>
</tr>
<tr>
<td>10</td>
<td>Turkey</td>
<td>39.5</td>
<td>...</td>
<td>-0.8</td>
<td>...</td>
</tr>
<tr>
<td>Rank</td>
<td>City</td>
<td>Million International Visitors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>---------------</td>
<td>-------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>BANGKOK</td>
<td>21.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>LONDON</td>
<td>19.9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>PARIS</td>
<td>18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DUBAI</td>
<td>15.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>NEW YORK</td>
<td>12.8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>SINGAPORE</td>
<td>12.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>KUALA LUMPUR</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>ISTAMBUL</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>TOKIO</td>
<td>11.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>SEOUL</td>
<td>10.2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>HONG KONG</td>
<td>8.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>BARCELONA</td>
<td>8.2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>AMSTERDAM</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>MILAN</td>
<td>7.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>TAIPEI</td>
<td>7.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>ROME</td>
<td>7.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>OSAKA</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>VIENNA</td>
<td>6.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>SHANGHAI</td>
<td>6.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>PRAGUE</td>
<td>5.8</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Mastercard
INTERNATIONAL TOURIST ARRIVALS 2016

World: 1,235 million

- 940 million in 2010
- 528 million in 1995

© UNWTO 2017
DECADES OF GROWTH - CHALLENGES

- SUSTAINABILITY
- INFRASTRUCTURES and LIVABILITY
- SEASONALITY
- DIGITAL TRANSFORMATION

COMPETITIVENESS
HOW IS COMPETITIVENESS MEASURED?

Performance Overview

- Pillar Rank/136
- International Openness 43rd
- Prioritization of Travel & Tourism 5th
- ICT readiness 29th
- Human resources and labour market 34th
- Health and hygiene 24th
- Safety and security 18th
- Business environment 75th
- Environmental sustainability 31st
- Air transport infrastructure 9th
- Ground and port infrastructure 15th
- Tourist service infrastructure 2nd
- Natural resources 9th
- Cultural resources and business travel 2nd
- Price competitiveness 98th

1st Spain
Overall score 5.4

Source: World Economic Forum
WHAT IS A SMART TOURISM DESTINATION?

A city or territory that intensively applies ICTs and data to:

- Provide a great travel experience
- Foster a sustainable tourism model
- Is part of a wider Smart City strategy
TRENDS IN SMART DESTINATIONS

FOCUS ON CUSTOMER EXPERIENCE
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE

NEW DIGITAL BUSINESS MODELS
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS

ACCELERATING DIGITAL TRANSFORMATION
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION

INTEGRATED DIGITAL INFRASTRUCTURES
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES

CO-CREATION OF TRAVEL EXPERIENCES
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES
✓ CO-CREATION OF TRAVEL EXPERIENCES

POLICIES TO FOSTER INBOUND TRAVEL
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES
✓ CO-CREATION OF TRAVEL EXPERIENCES
✓ POLICIES TO FOSTER INBOUND TRAVEL

LEVERAGING THE VALUE OF TRAVELLER DATA
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES
✓ CO-CREATION OF TRAVEL EXPERIENCES
✓ POLICIES TO FOSTER INBOUND TRAVEL
✓ LEVERAGING THE VALUE OF TRAVELLER DATA

OPEN INNOVATION AND CITY LABS
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES
✓ CO-CREATION OF TRAVEL EXPERIENCES
✓ POLICIES TO FOSTER INBOUND TRAVEL
✓ LEVERAGING THE VALUE OF TRAVELLER DATA
✓ OPEN INNOVATION AND CITY LABS

CITY BRANDING
**TRENDS IN SMART DESTINATIONS**

- Focus on Customer Experience
- New Digital Business Models
- Accelerating Digital Transformation
- Integrated Digital Infrastructures
- Co-Creation of Travel Experiences
- Policies to Foster Inbound Travel
- Leveraging the Value of Traveller Data
- Open Innovation and City Labs
- City Branding

**CAMPAIGNS BASED ON (CULTURAL) EVENTS**
TRENDS IN SMART DESTINATIONS

✓ FOCUS ON CUSTOMER EXPERIENCE
✓ NEW DIGITAL BUSINESS MODELS
✓ ACCELERATING DIGITAL TRANSFORMATION
✓ INTEGRATED DIGITAL INFRASTRUCTURES
✓ CO-CREATION OF TRAVEL EXPERIENCES
✓ POLICIES TO FOSTER INBOUND TRAVEL
✓ LEVERAGING THE VALUE OF TRAVELLER DATA
✓ OPEN INNOVATION AND CITY LABS
✓ CITY BRANDING
✓ CAMPAIGNS BASED ON (CULTURAL) EVENTS

REAL ESTATE AND INVESTMENT
TRENDS IN SMART DESTINATIONS

- Focus on Customer Experience
- New Digital Business Models
- Accelerating Digital Transformation
- Integrated Digital Infrastructures
- Co-Creation of Travel Experiences
- Policies to Foster Inbound Travel
- Leveraging the Value of Traveller Data
- Open Innovation and City Labs
- City Branding
- Campaigns Based on (Cultural) Events
- Real Estate and Investment

TOURISM FOR DEVELOPMENT
UN 2017 International year of sustainable tourism for development
RISKS AND CONCERNS

PERSONAL DATA PRIVACY
SECURITY
DIGITAL MONOPOLIES
LONG TERM FEASIBILITY
Daniel Fletcher
dfletcher@faculty.ie.edu
dfletcher@nuevoarpegio.com
https://es.linkedin.com/in/danielfletcherg
@danzfletcherg