Workshop UNWTO/CEU
Summary of Brainstorming

Vienna, 22\textsuperscript{nd} of September 2014
AGENDA

09:30 – 10.00  Welcome and Introduction to the Workshop
10.00 – 10.20  Summary of the survey results
10.20 – 11.00  Moderated brainstorming on most relevant issues for Europe (UNWTO/CEU countries) – part 1
11.00 – 11.20  Coffee break
11.20 – 12.30  Moderated brainstorming on most relevant issues for Europe (UNWTO/CEU countries) – part 2
12.30 – 13.30  Buffet lunch
13.30 – 15.15  Group Work – Definition of priorities for the UNWTO PoW from the perspective of the UNWTO/CEU and general ideas/suggestions
15.15 – 15.30  Coffee break
15.30 – 16.30  Presentation of the results by groups
16.30 – 17.00  Conclusion and final remark
Participants

Tugce Acir (Turkey)
Nuno Miguel Alves (Portugal)
Guy Antognelli (Monaco)
Mieke Bakkenes (Netherlands)
Blanka Belosevic (Croatia)
Martina Pavlaskova (Czech Republic)
Davide Codoni (Switzerland)
Joao Cotrim de Figueiredo (Portugal)
Isabel Garana (UNWTO)
Simion Giurca (Romania)
Marjan Hribar (Slovenia)
Christopher Imbsen (UNWTO)
Maria Napiórkowska (Poland)
Franz-Stefan John (Austria)
Goranka Lazovic (Montenegro)

Christel Leys (Flanders)
Angelika Liedler (Austria)
Irena Milinkovic (Slovenia)
Andrea Nemes (Hungary)
Rauf Pashaev (Azerbaijan)
Eliska Romanova (Slovakia)
Markus Wiesenhofer (Schönbrunn, Affiliate Member)
Mateja Tomin Vuckovic (Slovenia)
Ingrid Wehrmann (Austria)
Karolina Garcia Jonkisz (Spain)
1. Challenges for tourism in the UNWTO/CEU countries

2. Brainstorming „Relevant issues for tourism in UNWTO/CEU countries“
Challenges for tourism in the UNWTO/CEU countries

In June 2014 a standardized questionnaire with seven questions has been sent to all members of UNWTO CEU

1. What is the most important challenge for tourism policy in your country for the next 3-5 years?

2. Which specific measures are you going to implement to cope with that challenge in your country?

3. What are three other main challenges regarding tourism in your country which to your opinion are also affecting other countries in your region?

4. What kind of activities from UNWTO/CEU could to your opinion contribute to a solution to the issues you mentioned above?

5. What are the three most important current and future issues for tourism in the UNWTO/CEU region?

6. What kind of support do you expect from the UNWTO regarding the issues stated in question 5?

7. What are your expectations towards the UNWTO in general (e.g. regarding initiatives/activities/tools)?
Challenges for tourism in the UNWTO/CEU countries

The following 20 members filled in and returned the questionnaire:

[Map of countries with flags indicating participation]
Challenges for tourism in the UNWTO/CEU countries

For summarizing the answers the members have been grouped into three zones:

- **South / Mediterranean**
- **Central / East**
- **West / North**
The results of the survey have been clustered into five main groups:

- Trends – demand side
- Product development
- Marketing & Sales
- Framework conditions
- Knowledge transfer & education

Challenges for tourism in the UNWTO/CEU countries
National/regional challenges

Product development

- Structural deficits
- Financing gap for hotel projects
- Poor competitiveness in terms of pricing
- Upgrade of hotels and tourism infrastructure
- Increase competitiveness through innovation
- Increase the quality in order not to compete on price in the global competition

Marketing & Sales

- Retain market share and raise competitiveness in order to increase revenues
- Support tourism development in rural areas
- Sustainable development
- Invest in diverse, qualitative and innovative tourism products
- Uneven regional distribution of tourism within a country

- Raise the image of service in tourism
- Strengthen the reputation of being a tourism destination (brand)
- Grow the number of overseas visitors

- Attract more tourists from emerging markets
- Better organize and coordinate the national tourism promotion
Challenges for tourism in the UNWTO/CEU countries

National/regional challenges

Framework conditions

- Professionalism in tourism (small-scale structures)
- Government participation in PPP projects
- Visa and travel facilitation
- Motivate entrepreneurs to think about innovations
- Shape economical, ecological and social framework conditions for tourism development
- Exercise restraint in introducing or raising taxes/levies
- Climate change
- Sustainable mobility during high season
- Accessibility (tourism without barriers)
- Define the role of the government in tourism development
- Improve accessibility to destinations
- Create a favourable business climate for tourism

Knowledge transfer & education

- Improve tourism knowledge base
Challenges for tourism in the UNWTO/CEU countries

National/regional challenges

Product development

- Reduce seasonality – extend season
- Develop multi-national tourism products
- Competitiveness of tourism products
- Manage to use the existing resources in a sustainable way
- New business models in tourism
- Improve the quality of accommodation facilities and the accommodation structure

Marketing & Sales

- Improve the guest mix
- Development of IT
- PPP in tourism marketing
- Strengthen the brand

- Diversification of the offered tourism products
- Improve quality of service
- Innovative tourism product development
- Further develop cycling network
- Sustainable tourism development
- Balanced development in all regions

- Increase promotion on main source markets
- Improve the image as a tourism destination – also beside sun & sea
- Negative media coverage
Challenges for tourism in the UNWTO/CEU countries

National/regional challenges

Framework conditions

• Visa and travel facilitation
• Improve transport infrastructure (accessibility)
• Managing tourism destinations (development and marketing)
• Public transportation (within and between destinations)
• Climate change
• Prove to private sector that investment in tourism can be financially sustainable (especially in the long run) – stimulate private investment
• Political instability in neighbouring countries

Trends – demand side

• Manage changes in the tourists’ profile

Knowledge transfer & education

• Share of know-how through various channels (e.g. UNWTO)
• Improve statistics and research in tourism
• Education and training in tourism
• Lack of quality labour force
Challenges for tourism in the UNWTO/CEU countries

National/regional challenges

Product development

- Intelligent tourism specialization in the regions
- Increase the country’s competitiveness
- Improve the profitability of the tourism industry

Marketing & Sales

- Improve the national image as a tourism destination – strengthen the brand
- Increase promotion
- Target new market segments

Trends – demand side

- Change in guest mix and consumer patterns

- Sustainable development to preserve cultural and natural heritage for the future generations
- Improve quality of service

- Innovative marketing due to limited tourism marketing budget
Challenges for tourism in the UNWTO/CEU countries

Central/East

National/regional challenges

Framework conditions
- Stronger cooperation between tourism stakeholders (private and public)
- Effective use of existing and planned instruments for inter-governmental cooperation
- Visa and travel facilitation
- Transport connections (accessibility)
- Political tensions between Russia and the West
- Unfavourable tax regime

Knowledge transfer & education
- Improve statistics and make better use of the TSA
- Improve quality of labour force
- Coordination of regional and local tourism development
- Consolidate the legal framework for tourism
- Managing tourism destinations (development and marketing) - DMOs
- Create a favourable business environment to stimulate investment and innovation
1. Challenges for tourism in the UNWTO/CEU countries

2. Brainstorming „Relevant issues for tourism in UNWTO/CEU countries“
Results of the brainstorming

Important issues for Europe (UNWTO/CEU countries)

**Trends – demand side**

- Concentrate on current main European inbound markets
- New emerging inbound markets (e.g. Arabic countries, China) and how to deal with them (how to cooperate trans-nationally)
- What attracts “new” tourists? (research)
- How to manage tourism flows during high season
- Individuality of tourists is growing – how to reach visitors, how to use new IT
- Increasing mobility of people
- Enable “holidays for all”
- Demographic developments

- Changing demand patterns and target groups
- Changing behaviour of tourists
Results of the brainstorming

Important issues for Europe (UNWTO/CEU countries)

Tourism product development 1/2

• Creation of packages (along the value chain) – more cooperation needed
• How to increase profitability through product development
• How to create emotions with tourism products
• Diversification of tourism products in Europe
• Development of highlight tourism attractions
• How to convert natural/cultural resources into sustainable/profitable tourism products (but to ensure preservation at the same time)
• Coordinated (cross-border) tourism product development

• Tourism product development of alternative offer (besides main tourism products)
• Profitability of developments for private entrepreneurs and support of them
• How to use available public funding (e.g. EU) for suitable regional tourism product development
• Europe is a bit conservative in comparison to other global regions (insufficient innovation)
• Provide “experience” instead of sightseeing
• Consumer-driven tourism product development
Important issues for Europe (UNWTO/CEU countries)

Tourism product development 2/2

• Develop activities and tourism products to enlarge the season
• Improve the quality and structure of accommodation
• Stimulate a diverse, qualitative and innovative tourism product development by private entrepreneurs
• Modify Europe’s touristic offer to match the expectations of different target groups
Results of the brainstorming

Important issues for Europe (UNWTO/CEU countries)

Marketing & Sales

- Difficulty to get through with new (alternative) tourism products (besides the image-creating ones)
- Integrated IT solutions for marketing (social media distribution channels)
- How to manage tourism brands (especially in social media)
- Ask the question: Should we give up on traditional marketing?
- Common marketing for cross-border initiatives (for products/markets) but how – at the same time – preserve the individual country brand
- Segmentation of marketing on different markets
- Connect marketing with product development

- How to manage different distribution channels for marketing (public/NTO & private)?
- Demand aggregators (e.g. booking.com)
- General country brands (country DNA)
- How to react on violent events in/near Europe?
- Appropriate marketing tools for the different markets (intercultural knowledge)
- Amount of necessary marketing budget (NTO) and analyse effectiveness of marketing tools
- Consumer-based marketing activities (need to know our customers)
- Strengthening the reputation of Europe
Important issues for Europe (UNWTO/CEU countries)

Framework conditions

• Visa and travel facilitation
• Accessibility by plane
• Quality in service – employment in tourism (seasonal character)
• Coordination between different government entities regarding tourism relevant issues
• Spread of tourists in time and space
• Inappropriate statistics in tourism (especially missing harmonization)
• Put tourism on the highest possible agenda in the individual countries
• Deregulation in tourism can stimulate activities by the private sector
• Level of public involvement in tourism
• Sustainable mobility

• Global “regulations”
• Entrepreneurship in tourism
• Create a favourable business environment for tourism development
Important issues for Europe (UNWTO/CEU countries)

Knowledge transfer & education

- Europe-wide educational standards
- Educational framework conditions on a national level (responsible ministry)
- Life-long education (delivered by private sector)
- Cooperation in training (between countries)
- Harmonizing educational standards
- Research in tourism (create more basic knowledge) – e.g. what is innovation
- Discuss Best Practice Examples
- Professionalize tourism sector (increase know-how)
- Education of tourism stakeholders and potential future entrepreneurs

- Practical training semester abroad for students
- Improve knowledge transfer between the destinations
- Improve the image of employment in tourism