



World Tourism Organization

UNWTO

Global Report on City Tourism

AM Reports: Volume six

World Tourism Organization, 2012

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Thanks also to the UNWTO Tourism Trends and Marketing Strategies Programme

Global Report on City Tourism - Cities 2012 Project (AM Report nº six)

Published by the World Tourism Organization (UNWTO), Madrid, Spain.

First printing: 2012

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Design & Print by www.detectivegrafico.com

Photos by UNWTO and Dreamstime

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Citation:

World Tourism Organization (2012), *Global Report on City Tourism - Cities 2012 Project*, UNWTO, Madrid

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Foreword

Taleb Rifai,
Secretary-General,
World Tourism Organization (UNWTO)

The world's cities are also some of the world's greatest tourism destinations. Tourists are drawn, in growing numbers, to the vibrancy, excitement and diversity on offer in cities worldwide. The socio-economic impact of these visitors is extraordinary. Whether visiting for leisure, business, or to meet friends and relatives, tourists contribute to the local economy and support jobs across the city and beyond. As tourists' preferences and expectations change, so do cities, with tourism triggering constant investment in infrastructure, promotion and conservation, benefiting tourists and local residents alike.

As UN Habitat has observed, half of the world's population now lives in towns and cities and this number is expected to reach almost five billion by 2030. Urban tourism, with the economic and employment opportunities it creates, has become a key factor in overall urban planning and increased well-being for the billions living in the world's cities.

Managing urban tourism, however, is no simple task. As metropolitan areas expand rapidly, both the public and private sector face radical changes, as well as significant opportunities. Sustainably managing increasing tourist numbers amid a constantly changing city landscape while ensuring the city is developed to respond to the needs of both visitors and local communities is key.

Against this background, the Global Report on City Tourism is a timely contribution to the debate of the role of cities in the growth of global tourism and conversely the role of tourism in contributing to the well-being, environmental quality and cultural identity of city dwellers worldwide.

The Report is based on a wide-ranging study carried out by the UNWTO Affiliate Members Programme among 21 of the world's most-visited cities, providing insight into their urban tourism strategies and priorities. These 21 cities represent an international reference in urban tourism and I thank them sincerely for their contribution and engagement in this project.

I would also like to call attention to the Istanbul Declaration on City Tourism, included in this report, approved by all 21 cities meeting in Istanbul, Turkey for the UNWTO Global Summit on City Tourism, which provides a valuable framework for policy planning and guidance. I am confident that together, this Report and the Istanbul Declaration will significantly strengthen tourism's role in shaping more prosperous and sustainable cities for all.



Introduction

Introducing the city



According to the classics, the city is material, social and political, that is to say, it is the most sophisticated cultural product for civilized coexistence. The city is part of our culture, our history; it's the epicentre for many of our traditions. We all live and work in cities and yet we visit other cities during our free time. As society is in constant change so are cities, trying to adapt and meet the needs of residents and visitors as well as making it an attractive destination for future visitors. This is a unique economic and social opportunity; it brings dynamism and vitality, growth and development, and becomes an important element in people's lives.

The growth of the city and the ultimate goal of urban planning should be the logical response to the needs of its residents in order to increase their quality of life: well-being, environmental quality and cultural identity.

Cities are constantly changing; they are built, transformed and continuously growing. Cities are also occupied by different types of groups and each uses the city in a different way, generating a spatial organization, some kind of residential differentiation that also creates invisible borders reflecting how that society is structured.

Cities provide new opportunities and have a great impact on the local economic growth, for instance becoming a key element to reduce poverty. Urbanization does indeed play a

“ Proximity has become ever more valuable as the cost of connecting across distances has fallen. ”

positive role in the overall poverty reduction, particularly where supported by well-adapted policies (UN HABITAT State of the World's Cities 2010/2011 - Cities for All: Bridging the Urban Divide). In this complex and never-ending process of striving to build the most integrated and cohesive city possible, we must remember that as early as 2500 years ago Plato stated in The Republic that, "any city, however small, is in fact divided into two, one the city of the poor, the other of the rich".

But cities can also help to reduce transaction costs such as infrastructure and services; they behave like social networks providing information and facilitating the diffusion of knowledge. Ever since they first formed, cities have served as bridges between cultures. They have been engines of innovation since the days when the great philosophers argued in the Athenian marketplace. Cities indeed bring together their most intelligent citizens and are hubs for the transmission of ideas, information and knowledge; and the ideas and the strength that emanate from human collaboration constituting the ultimate source of wealth creation.

The need to understand and study more closely the city as a dynamic and organic element in people's lives becomes crucial not just for marketing or product purposes but also to be able to organise its society, infrastructure and institutions in the most effective and economic way. We not only live in or visit cities, we evolve together with them.

It has been rightly pointed out that an appropriate way to address the global crisis is the bottom-up approach, by trying to achieve growth at the local level. Many countries thrive because there are two or three cities that are the engines of their overall progress.

Edward Glaeser argues that the central paradox of the modern metropolis is that "proximity has become ever more valuable as the cost of connecting across distances has fallen". Cities represent proximity and population density, but also privacy at the same time. In an increasingly globalized world, cities are interconnected nodes.

Tourism therefore is a very important element in all policies related to urban development, it is not just a strategy to provide a competitive product to meet visitors' expectations but a way to develop the city itself and provide more and better infrastructures and bring conditions to residents.

“The city is built with the aim of attaining happiness (Aristotle)”





What is city tourism ?

UNWTO refers to urban tourism as trips taken by travellers to cities or places of high population density. The duration of these trips is usually short (one to three days) therefore it can be said that urban tourism is closely linked to the short – breaks market (Tourism 2020 Vision, UNWTO 2002).

Large metropolitan areas are, in general, more productive. According to United Nations data, in all countries there is an almost perfect correlation between urbanization and prosperity. But cities also prosper as centres of consumption, pleasure and leisure.

Urban Tourism has, in one form or other, been with us since Mesopotamia and Sumeria were spawning the phenomenon of urbanization. People with the means and inclination to do so have been drawn to towns and cities just to visit and experience a multiplicity of things to see and do... These (towns and cities) were the melting pots of national culture, art, music, literature and of course magnificent architecture and urban design. It was the concentration, variety and quality of these activities and attributes... that created their attraction and put certain towns and cities on the tourism map..." (Karski 1990, p15)

Urban tourism has always been a daunting task for both the public and the private sector. Its multi-functional nature makes it complicated to plan and manage. Metropolitan areas are quickly growing and new issues and challenges are emerging. Insufficient literature has also contributed to the lack of understanding of tourism and its effects on the development of cities, hence the need to examine and identify these new challenges and opportunities posed by city tourism in the current decade.

In the early 20th century, cities started to be aware of themselves as tourist attractions; those that reacted to this phenomenon enjoyed an economic boost thanks to the activities they provided to visitors. Tourism in the United States, for example, grew rapidly, all major cities attracted tourism and this meant a change in the way people not only lived but also perceived cities. Travel becomes an important element in people's lives; they want to visit and experience other cities.

Urban Tourism becomes an area of interest during the 80s; we can increasingly find more research and publications related to urban tourism, which also identify this as a complex phenomenon affecting many stakeholders in the value chain. The birth of low cost airlines has also brought an increased interest in cities and their development in terms of tourism, for example European cities had to adapt their marketing activities to attract a new type of product: city breaks.

Cities appeal to a broader market, they are easy to reach and they have a lot to offer, this also brings a new spending pattern that can go from those staying in budget hotels to the five star hotel customer, but all have one thing in mind: they want to discover and visit other cities. Cities need to assess their products and understand which of their products offerings appeal to the market.

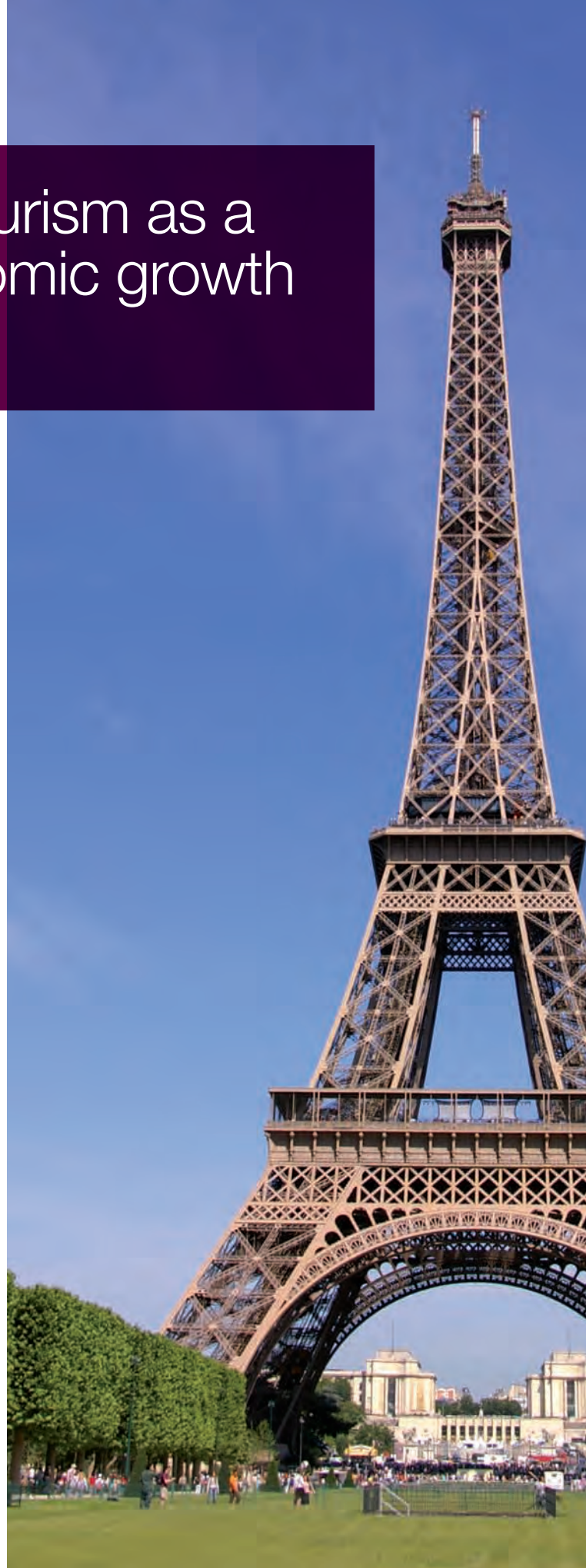
The importance of tourism as a driver of global economic growth and development

Over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged, challenging the traditional ones of Europe and North America. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 528 million in 1995, and 983 million in 2011.

According to *Tourism Towards 2030*, UNWTO's recently updated, long-term outlook and assessment of future tourism trends, the number of international tourist arrivals worldwide is expected to increase by 3.3% each year on average from 2010 to 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 1.8 billion arrivals by 2030.

As an internationally traded service, inbound tourism has become one of the world's major trade categories. The overall export income generated by inbound tourism, including passenger transport, exceeded US\$ 1.2 trillion in 2011, or US\$ 3.4 billion a day on average. Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services. Globally, as an export category, tourism ranks fourth after fuels, chemicals and food. For many developing countries it is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development.

Based on the information from countries with data available, tourism's contribution to worldwide gross domestic product (GDP) is estimated at some 5%. Tourism's contribution to employment tends to be slightly higher and is estimated in the order of 6-7% of the overall number of jobs worldwide (direct and indirect). For advanced, diversified economies, the contribution of tourism to GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries where tourism is an important pillar of the economy. For small islands and developing countries, the weight of tourism can be even larger, accounting for up to 25% in some destinations.





What does tourism mean for cities?

On a planet with vast amounts of space, cities are the places where people desire to live. Today, more than half the world population is urban.

According to the UN, the world's urban population is expected to grow by 61% by 2030, the volume of people living in cities will rise to 5 billion by 2030 and this will have a considerable impact on urban tourism as a key factor not only in the city development but also in its economy.

Urban tourists can bring substantial economic benefits to cities; it is a fact that the economic impact on any major city dominates over the social and political impact and this may well be a consequence of the need to quantify the return of every investment, especially in terms of employment and economic impact.

Tourism brings new patterns and changes to the urban landscape, such as globalization, a phenomenon that impacts not only big cities but also medium and small size ones; its impact is best recognised in the hospitality sector where hotel rooms and restaurants are exactly the same in London, Paris, Hong Kong or New York.

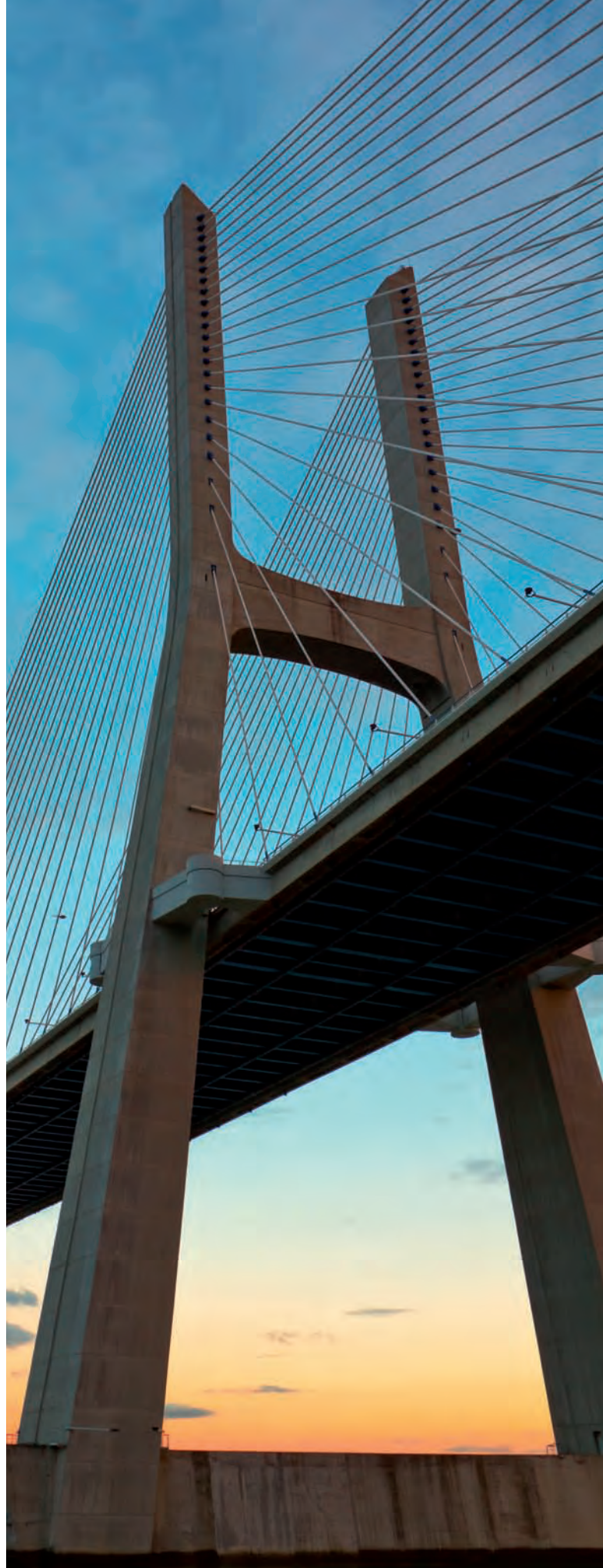
Cities are constantly growing and in a constant state of change to provide its visitors the experiences and products they expect and these products and experiences are also constantly changing in order to adapt to an increasing demand. All this triggers a constant investment in infrastructure, promotion and conservation ultimately benefiting tourists and local residents.

“ Cities are constantly growing and in a constant state of change to provide its visitors the experiences and products they expect and these products and experiences are also constantly changing in order to adapt to an increasing demand. ”

- Tourism needs the diverse and flexible products a city can offer and cities need tourism to achieve their social and economic objectives.
- Tourism brings vitality and dynamism to cities but it also brings new patterns and changes to their urban landscape.
- Tourism connects people, creates relationships, it teaches them how to live in close proximity to one another.
- Tourism is one of the main pillars and economic drivers of many countries. It plays an important role in terms of employment, income and maintenance of urban infrastructure and public services.
- Tourism has triggered a more competitive approach and destinations are focusing on their product offering and becoming more specialized in order to stay ahead and change together with the city.
- The tourism industry has to implement innovative strategies to provide the city with a consistent image and therefore provide significant revenue and added value to its residents.

For this, there is a clear opportunity to continue the discussion of this subject and focus on the challenges that cities in different regions around the world have to face, such as:

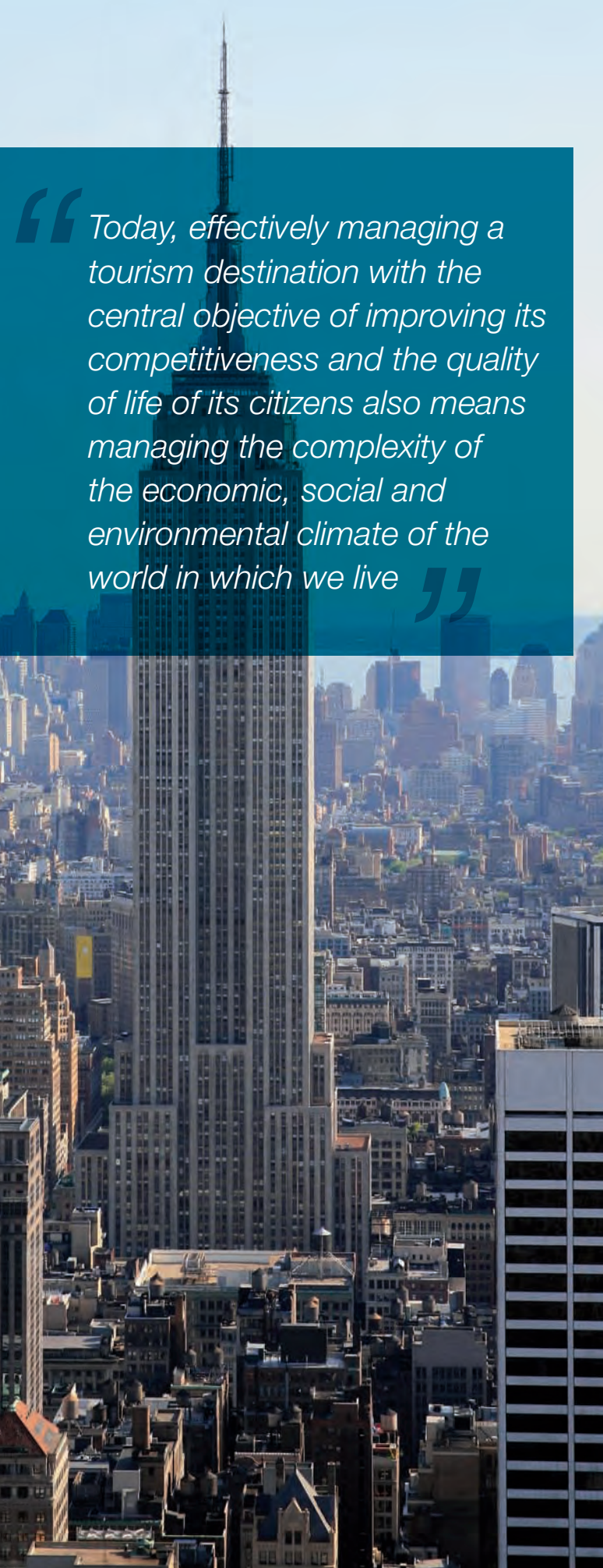
- How to manage the increasing number of tourists arriving to cities in a responsible and sustainable way?
- How to use urban tourism to improve the quality of life of the local population?
- How can we make sure that tourism action plans and the city development are part of the decision making process?
- How can we incorporate available ICT's to develop smart cities that are more competitive, sustainable, accessible and human?
- How to measure the economic impact of tourism for the cities?
- How can cities take practical steps to reduce impact on the environment and promote the benefits of greener tourism?





A low-angle, upward-looking photograph of several tall skyscrapers against a twilight sky. The buildings are densely packed, with their windows reflecting the ambient light. A semi-transparent teal rectangular box is overlaid on the center of the image, containing the text.

How can
destinations
stand out in
the crowd?



“Today, effectively managing a tourism destination with the central objective of improving its competitiveness and the quality of life of its citizens also means managing the complexity of the economic, social and environmental climate of the world in which we live”

Destinations contain a number of basic elements which attract the visitor to the destination and which satisfy their needs upon arrival. The provision and quality of these elements will be influential in the visitor's decisions to make their trip.

Today, effectively managing a tourism destination with the central objective of improving its competitiveness and the quality of life of its citizens also means managing the complexity of the economic, social and environmental climate of the world in which we live, where uncertainty and threats are constantly present. How otherwise can we make long-term policies and ensure prosperity for tourism destinations without taking into account for example climate change or the scarcity of resources? It seems clear that the same recipes that not long ago seemed to suit a less turbulent and unpredictable world, need to be revised to suit an ecological system with limits and a society with values and upward aspirations. Given these circumstances, the task of a tourism analyst becomes especially difficult. It is no doubt useful to gain a picture of the tourism sector towards the year 2030 as UNWTO has just done, because, to quote Keynes, it's best to try to look ahead and be “approximately right rather than exactly wrong.”

So, within the emerging trends for tourism, it is well accepted that we are going to see a global increase in travel, facilitated by means of transport that are progressively breaking barriers in a more competitive global market and where tourists are making an impact never seen before. At the same time, tourism will remain closely linked to the rapid changes brought about by the exchange of knowledge, innovation and technological advances, and sustainability will continue to be the watchword for tourism and business activity.

A look at the evolution of national tourism destinations over the last 60 years presents us with some obvious conclusions:

- **Today all destinations compete in a demanding global market.**
- **That market is ‘flattening out’ at its peak: in 1950 the top five most visited countries in the world took 71 % of the total market share. By 2011 the top five accounted for only 31%.**
- **Tourists are travelling more and more to remote destinations than ever before, making the social and economic impact of their visits felt on a much wider scale.**

This increasingly complex and competitive environment for tourism destinations increases the need for them to diversify and to stand out. The truth is that the future is already here and as a result of the economic and financial crisis that much of the world is suffering from, we are on the threshold of significant changes in values, attitudes and ways of living as well as in

social structures themselves. As a result of the well-known major trends in the world of tourism, new ways of doing things and new products will come to fruition over the course of this decade, many of which we can't even imagine right now.

Today new trends in destination development can be observed which in my view, centre on five main factors:

- **1. Experiential or emotional elements which will continue to give way to new, more affordable and accessible forms of enjoyment that will focus on the human and inter-relational dimension of the human race.**
- **2. The focus on enjoyment will displace partially or even completely the traditional focus on cost. As John Fitzgerald Kennedy said, "GDP measures everything except that which gives real value to life".**
- **3. Tourism will strengthen its focus on ethics and will become more demanding in areas such as sustainability and responsibility, which themselves will be more important to the world's citizens.**
- **4. According to the United Nations, the world's urban population is expected to increase by 61% by 2030, when 5 billion people will be living in cities. This will clearly heighten the importance for tourism as a key factor for the integral development of cities**
- **5. We will gain a greater appreciation for spaces that are harmonious and well cared-for, with nature as a priority both in terms of people's enjoyment of it, as well as as active citizens' personal commitment to its protection and conservation.**

These potential trend factors will require a clear alignment of interests of both businesses and tourism destinations.

Therefore, we ask 'how can we progress in these environments and take advantage of the clear opportunities for tourism in the future? We certainly don't have magic solutions, but allow me to present some possible ideas for how this can be done:

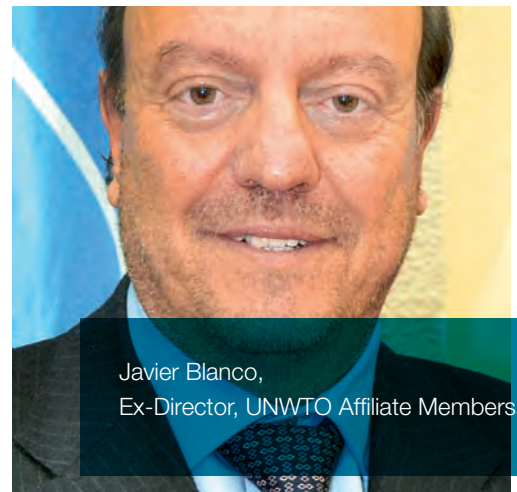
a) By facing the world with an open mind: The tourism industry today requires a workforce that has an open mind, with digital capabilities and intercultural skills, with an "ability to easily discover and interpret the intersection of disciplines and different visions of the world" (E. Wilson), and to properly interpret relevant contexts.

b) By transforming information into knowledge and applying the best available knowledge management: Tourism is an information-intensive sector but also one which consistently lacks an adequate transferral of knowledge through its many components. There is then, a clear need for tools and systems that properly coordinate and manage the knowledge available allowing it to flow along the tourism value chain. The manner and extent to which destination stakeholders exchange knowledge with each other will affect the processes of strategic change and sustainable development of these destinations. As we shall see in this report, nowhere is the need for accurate, reliable data to aid decision making more obvious than in the process for establishing new air routes.

c) By the various destination stakeholders learning to work together through an integration of interests at all levels of government and with strategic planning in the medium-long term, setting limits for development where appropriate and conducting periodic audits and assessments. Again, as this report will show, effective, well-managed and balanced cooperation is essential if tourism traffic is to benefit all the parties concerned.

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“To quote Keynes, it's best to try to look ahead and be 'approximately right rather than exactly wrong'”



Javier Blanco,
Ex-Director, UNWTO Affiliate Members



Cities 2012 project: background and methodology

The process began in April 2011, at the initiative of the UNWTO Affiliate Members Programme, under the name “CITIES 2012” with the idea of promoting debate and sharing different views on the current state and future prospects of city tourism in the world. To this end a specific group was opened within the user community of the then recently created technological platform, platma.org, of the UNWTO Affiliate Members. The aim was to try to review, corroborate and update the position of the UNWTO on city tourism by working jointly with the actors involved and examining their best experiences.

To this end, work was carried out internally on the preparation and drafting of the collaboration proposal to be submitted to the cities that ended up being selected. Next, the ranking of tourism cities worldwide and visitor arrivals recorded in the last three years were studied. This initial information was completed with supplementary sources (e.g., that offered by European Cities Marketing), and correction factors were introduced to try to get a representative sample of cities on five continents, regardless of whether or not they were Affiliate Members of the World Tourism Organization.

In July 2011 the proposal and the invitation were presented to the group of pre-selected cities, and in September all of them were contacted. The participation of 21 of them was confirmed and the main contact persons in each city were noted.

Based on research conducted with the UNWTO's own sources, as well as other outside sources (ECM, WTTC, ETC, among others), an initial questionnaire was prepared with the aim of determining the most pertinent issues and priorities for cities in the strategic management of tourism in their respective destinations. This questionnaire was sent out in October 2011.

In November 2011 all responses to the first questionnaire were received, and the analysis and identification of the most pertinent topics began.

In November / December 2011, with the help of new internal and external sources, and the analysis of the results of that first survey, a second questionnaire was prepared with the aim

of collecting more detailed and in-depth information on the topics that cities had indicated as crucial in their responses. Thus, in December 2011 the second survey containing a total of 80 questions was sent out. From January to March 2012 constant contact was maintained with the participating cities to offer support and receive their responses. After all the responses were received, the results were analysed and each topic selected by the cities was researched.

In July / August 2012 a first draft document was prepared also containing a selection of “case studies” submitted by participating cities, and summary factsheets were prepared for each of them for better dissemination. In September 2012 the participating cities were sent a draft version of the “Global Report on City Tourism” which was to form part of the “AM Reports” series of the Affiliate Members, as well as a draft declaration, so that they could provide their comments and recommendations to the managers of the project, which then culminated with the preparation of the final documents.

With this in mind, UNWTO Affiliate Members conducted a survey among 21 cities worldwide to provide an in-depth analysis of the different areas identified as key factors within the overall cities' strategy; 21 cities that represent an international reference in urban tourism due to their knowledge, innovative actions and business models.

“The process began with the idea of promoting debate and sharing different views on the current state and future prospects of city tourism in the world.”

CITY	POPULATION 2010	DOMESTIC VISITORS 2010	INTERNATIONAL VISITORS 2010
Athens	* 3,074,160	n.a.	3,170,478
Barcelona	1,619,337	1,973,487	5,160,037
Berlin	3,460,725	5,777,183	3,274,247
Bogota	** 7,363,782	* 17,097,258	* 1,539,407
Buenos Aires	2,891,082	6,995,261	3,017,030
Cape Town	*** 3,497,097	1,755,000	1,251,215
Hong Kong	6,979,000	n.a.	36,030,000
Kazan	1,143,000	930,000	130,000
Lisbon	469,509	** 921,896	** 1,924,017
London	7,750,000	11,580,000	14,710,000
Madrid	3,284,110	4,025,777	3,843,643
Melbourne	4,137,432	**** 6,470,000 **** Domestic overnight visitation	1,449,200
New York	8,175,133	39,100,000	9,744,000
Paris	2,211,297	** 7,069,367	** 8,113,794
Québec City	621,545	*** 8,669,980	*** 1,095,269
Quito	2,239,191	1,000,000	470,000
Rio de Janeiro	6,320,446	n.a.	1,610,000
São Paulo	11,037,593	10,096,181	1,656,495
Shanghai	23,019,148	n.a.	n.a.
Vienna	1,703,000	2,650,214	9,026,220
Zaragoza	696,656	** 616,467	**183,471

* Data 2011

* Survey estimation

* Survey estimation

** Source DANE

** Arrivals at licensed hotels

** Arrivals at licensed hotels

*** 2007 Data

*** 2009 Data

*** 2008 Data



The participating cities

The participating cities



Athens is the historical capital of Europe, with a long history, dating from the first settlement in the Neolithic age. In the 5th Century BC (the “Golden Age of Pericles”) – the culmination of Athens’ long, fascinating history – the city’s values and civilization acquired a universal significance. Over the years, a multitude of conquerors occupied Athens, and erected unique, splendid monuments - a rare historical palimpsest. In 1834, it became the capital of the Modern Greek State and in the two centuries since it has become an attractive modern metropolis with unrivalled charm.

- Population in 2010: 3,074,160
- International arrivals in 2010: 3,092,195
- Tourism budget in 2010: less than 1 million dollars

ATHENS TOURISM AND ECONOMIC DEVELOPMENT COMPANY

The Athens Tourism and Economic Development Company (ATEDCo) was created in order to present Athens as a dynamic European metropolis and a competitive tourism and convention destination. Among its main objectives is the planning of actions for the support and promotion of the image of Athens as an urban and congress destination via participation in specialized exhibitions and campaigns, as well as overseeing communication and public relations policy and strategies for the strengthening of tourism as a key element of the city’s economy.



With a population of more than 1,6 million inhabitants, Barcelona is today one of the world’s leading tourist, economic, trade fair/exhibitions and cultural-sports centres, and a heavyweight in commerce, education, entertainment, media, fashion, science, and the arts. It is a major cultural and economic centre in south-western Europe and a growing financial centre. Barcelona is a transport hub with one of Europe’s principal ports. Barcelona’s international airport handles over 34 million passengers per year and the city has an extensive motorway network. Recently the city has also become a hub for high-speed rail as it has joined the new link between Spain and France, currently the second longest in the world.

- Population: 1,619,337
- International arrivals in 2010: 7,133,524 *
- Tourism budget in 2010: More than 1.1 million dollars

TURISME BARCELONA

The Turisme de Barcelona consortium is the organisation responsible for promoting Barcelona as a tourist destination. It was founded in 1993 by Barcelona Municipal Council, the Barcelona Chamber of Commerce, Industry and Shipping and the Barcelona Promoció Foundation. Local government and the private sector hold an equal share in the organisation which works to attract tourists to Barcelona. Every year Turisme de Barcelona carries out some 400 promotional activities, selected according to market segmentation, by countries or tourist typologies. It is helped in this endeavour by 700 direct associates in the form of businesses from the sector, the “members” of Turisme de Barcelona which provide the consortium with funding and know-how.

* Source: Barcelona Tourism Statistics



Berlin

www.visitBerlin.de

Berlin is home to renowned universities, research institutes, orchestras, museums, and celebrities, as well as host of sporting events. Its urban setting and historical legacy have made it a popular location for international film productions. The city is well known for its festivals, diverse architecture, nightlife, contemporary arts, public transportation networks and a high quality of live. Berlin also serves as a continental hub for air and rail transport, and is a popular tourist destination

- Population in 2010: 3,460,725
- International arrivals in 2010: 9,051,430 (Source: Amt für Statistik Berlin-Brandenburg)
- Tourism budget in 2010: More than 11.1 million dollars

VISITBERLIN

visitBerlin has advertised the tourist services offered by the City State of Berlin worldwide since 1993. It is the service agency for congress and tourism partners in the various markets and an active information broker for the travel industry. visitBerlin also operates Berlin Tourist Information, which offers the complete tourist service spectrum to visitors to the capital.



Bogota

www.bogotaturismo.gov.co

Colombia's capital city of Bogota, extending 33 km from south to north and 16 km from east to west, consists of 20 districts, 19 of which are urban. The first inhabitants of Bogota, founded on August 6, 1538, were the Muisca. The city is at the heart of Colombia's administrative, economic and political development.

- Population in 2010: 7,363,782
- International arrivals in 2010: 394,945
- Tourism budget in 2010: Between 4.1 and 7 million dollars

DISTRICT TOURISM INSTITUTE

The District Tourism Institute is a public district-order establishment appointed to the District Economic Development Secretariat (abbreviated in Spanish as SDDE); it was created through Agreement 275, February 27, 2007, and its objective is the execution of policies, plans and programs for promoting tourism and positioning the Capital District as a sustainable tourism destination.

Our mission is to boost Bogota's economic development by means of the promotion and positioning of the touristic activities of the city and the management of the touristic competitiveness and sustainability of the destination

The participating cities

Buenos Aires

www.bue.gob.ar



On the shores of the Plata River (which is so wide that many travellers usually mistake it for the sea), Buenos Aires has a mild climate and many sunny days. The green and wet natural landscape can be enjoyed in parks, in the surroundings or in the enormous Ecological Reserve. Many tourists visit Buenos Aires for its urban environment and mostly for its plentiful cultural activities. The city – with three million inhabitants – has many neighbourhoods to visit. In each one, there are bars, parks, football stadiums, museums, temples, milongas (where people dance Tango), theatres as well as cafes, ethnical restaurants and bistro. The most visited areas by national and foreign tourists are San Telmo, Recoleta, Abasto, Puerto Madero, Palermo, La Boca, Downtown and Corrientes Avenue where most theatres are located.

- Population in 2010: 2,891,082
- International arrivals in 2010: 3,017,030 (Ezeiza International Airport, Jorge Newbery Port of Buenos Aires and Retiro Bus Terminal).
- Tourism budget in 2010: Between 4.1 and 7 million dollars

ENTE DE TURISMO DE BUENOS AIRES

The Ente de Turismo de Buenos Aires (Tourism Authority of Buenos Aires) was created in 2007 as an autonomous body under the Ministry of Culture of the Autonomous City of Buenos Aires. Its aim is to design and execute policies and plans for the promotion, development and growth of tourism as a strategic economic activity of the City. Its Board of Directors is composed of representatives of the different tourism business associations of the City of Buenos Aires and representatives of the Autonomous Government of the City of Buenos Aires. Its chairmanship is held by the Minister of Culture of the City. The management of the tourism policies of Entur is carried out by the Executive Director's Office and five General Directorates: Research and Tourism Observatory; Product Development and Competitiveness; Tourism Promotion; Communication and Technology; and Administrative and Legal Affairs.

Cape Town

www.capetown.travel



Cape Town is the quintessential melting pot: it is a city alive with creativity, colour, sounds and tastes. While walking through the city's streets and meeting its people, you will fall in love with its natural beauty, creative freedom and incredible spirit. Cape Town is a city where the unexpected is always just around the corner and the beautiful province of the Western Cape lies ready to be explored across the city border.

- Population in 2010: 3,497,097
- International arrivals in 2010: 632,319 (Source: International Arrivals at CPT International Airport)
- Tourism budget in 2010: Between 4.1 and 7 million dollars

CAPE TOWN TOURISM

Cape Town Tourism is the City of Cape Town's official regional tourism organization, responsible for destination marketing, visitor and industry services. Cape Town Tourism believes in close encounters, people as the focus point of tourism, responsible living and immersion in the destinations and cultures we visit – this is what gives tourism in Cape Town its unique energy and appeal. Cape Town Tourism prides itself in a culture of service excellence and we are committed to responsible and fair tourism ►

and business practices. We therefore work with and encourage the involvement of previously disadvantaged individuals, organizations and companies in tourism in a number of ways. We also support the principles of Responsible Tourism and Fair Trade in Tourism South Africa, we are Proudly South African, we are passionate about Cape Town and we encourage our members to adopt these principles in the operations of their businesses as well.

Hong Kong



www.discoverhongkong.com



As one of the world's leading international financial centres, Hong Kong has a major capitalist service economy characterised by low taxation and free trade, and the currency, Hong Kong dollar, is the eighth most traded currency in the world. The lack of space caused demand for denser constructions, which developed the city to a centre for modern architecture and the world's most vertical city. Hong Kong has one of the highest per capita incomes in the world. [6] The population density has also led to a highly developed transportation network with public transport use exceeding 90 % - the highest in the world. Hong Kong has numerous high international rankings in various aspects. For instance, its economic freedom, financial and economic competitiveness, quality of life, Human Development Index, etc., are all ranked highly

- Population in 2010: 6,979,000
- International arrivals in 2010: 9,854,381
- Tourism budget in 2010: Between 7.1 and 11 million dollars

HONG KONG TOURISM BOARD

The Hong Kong Tourism Board (HKTb) is a government-sponsored body tasked to market and promote Hong Kong as a travel destination worldwide and to enhance visitors' experience once they arrive. Its mission is to endeavor to increase the contribution of tourism to Hong Kong, promote Hong Kong globally as a leading international city in Asia and a world-class tourist destination and promote the improvement of facilities for visitors, among others. HKTb works in partnership with relevant government departments and organizations, the travel-related sectors, and other entities directly or indirectly related to tourism.

Kazan



www.gokazan.com



Kazan is the capital of the Republic of Tatarstan, one of the largest and most beautiful cities of Russia and on the list of UNESCO World Heritage cities. Old Kazan is the centre of the city. The area features beautiful buildings raised in different architectural styles. Mansions in the style of modernism coexist with Baroque monuments. The ancient white walls of the Kazan Kremlin open onto the river and the red bell tower of Bogoyavlenskaya church at the pedestrian Bauman street is especially adored by tourists. Kazan easily combines the culture and traditions of the East and the West: next to the finely cut minaret towers there are old Orthodox churches. A prevailing feature of life in the city is the peaceful, creative coexistence of different religions and nationalities.

- Population in 2011: 1,145,400
- International arrivals in 2011: 135,000
- Tourism budget in 2011: Less than 1 million dollars

COMMITTEE FOR FOREIGN RELATIONS AND TOURISM OF KAZAN CITY MUNICIPALITY

The Committee for foreign relations and tourism of Kazan city municipality cooperates with commercial and public organizations for the development of internal and incoming tourism in Kazan city. It conducts special advertising campaigns and marketing efforts promoting Kazan as a city destination. The main objective of the organization is to improve the quality of tourist infrastructure and service, and to enhance competitiveness of the city in the international market.

The participating cities

Lisbon



www.visitlisboa.com

The maritime Voyages of Discovery turned Lisbon into one of the world's great ports and the centre of an empire that stretched from Brazil in the West to India in the East. On the banks of the river, great monuments testify to that history. After the earthquake of 1755, the Baixa Pombalina downtown was rebuilt in the classical style while many of its adjoining medieval neighbourhoods survived and are now home to an amazing array of stores, restaurants and cafés. Lisbon's exceptional and highly individualistic atmosphere has charmed writers, photographers and filmmakers with the polychrome façade tiles serving to create a particular atmosphere.

- Population in 2010: 469,509
- International arrivals in 2010: 1,919,117
- Tourism budget in 2010: More than 11.1 million dollars

TURISMO DE LISBOA

Turismo de Lisboa is a non-profit organization, established through an alliance of public and private bodies, which operate in the tourist sector. It now has around 550 associated members. The main objective of this association since 1998 is to combine efforts, in order to improve and further the promotion of Lisbon as a tourist destination, and thus to improve the quality and competitiveness of the city. The Association's activities also include the creation of various tourist projects, as a result of private initiatives or in partnership with other entities.

London

www.londonandpartners.com

London is a leading global city, with strengths in the arts, commerce, education, entertainment, fashion, finance, healthcare, media, professional services, research and development, tourism and transport all contributing to its prominence. It is the world's leading financial centre alongside New York City and has the fifth- or sixth-largest metropolitan area GDP in the world depending on measurement. London has been described as a world cultural capital. It is the world's most-visited city measured by international arrivals and has the world's largest city airport system measured by passenger traffic. London's 43 universities form the largest concentration of higher education in Europe. In 2012 London became the first city to host the modern Summer Olympic Games three times.

- Population in 2010: 7,750,000
- International arrivals in 2010: 14,710,000
- Tourism budget in 2010: Between 1.1 and 4 million dollars

LONDON & PARTNERS

London & Partners is a not-for-profit public private partnership, funded by the Mayor of London and our network of commercial partners. We work in partnership with organisations in London and across the world to deliver our vision and mission. London & Partners was created in order to bring together the remits of the capital's promotional agencies: Think London, Study London and Visit London. The aim is to create one single promotional organisation for London that can speak with one voice, vision and mission to all audiences in the UK and internationally. Our remit is to drive leisure and business visitors as well as bidding to secure major events in London. We can unlock the city for new businesses that want to set up or expand in London and we promote the capital's world class universities to international students.

Madrid



www.esmadrid.com



The capital of Spain, located in the heart of the Iberian Peninsula and right in the centre of the Castilian plain 646 meters above sea level, Madrid has a population of over three million. A cosmopolitan city, a business centre, headquarters of the country's Public Administration, Government, Spanish Parliament and the home of the Spanish Royal Family, Madrid also plays a major role in both the banking and industrial sectors. Most of its industry is located on the Southern fringe of the city, where important textile, food and metalwork industries are clustered. Madrid is characterized by intense cultural and artistic activity and a very lively nightlife.

- Population in 2010: 3,284,110
- International arrivals in 2010: 3,843,642
- Tourism budget in 2010: More than 11.1 million dollars

MADRID CONVENTION BUREAU

The Madrid Convention Bureau is a non-profit organization created by the Madrid City Council in collaboration with a group of public and private companies from the sector, with a view to promoting Madrid as a city capable of hosting national and international meetings and aiming to enable these events from a technical and institutional viewpoint. Since 2008, the Bureau has been a department of the Empresa Municipal de Promoción de Madrid and currently brings together some 200 members. Madrid Convention Bureau places itself at the disposal of event, meeting or incentive trip planners to ensure that any sort of event staged in the city will be carried out smoothly and to promote the Spanish capital as a convention city.

Melbourne

www.destinationmelbourne.com.au



Melbourne is the State of Victoria's capital city and the business, administrative, cultural and recreational hub of the state. The City of Melbourne municipality covers 37.6 sq km and has a residential population of around 98,860 (as of 2011). On an average day, around 805,000 people use the city, and Melbourne hosts over a million international visitors each year. Melbourne is very much about lifestyle. It's no huge surprise to residents that their city has been consistently ranked as one of the world's most liveable cities.

- Population in 2010: 4,137,432
- International arrivals in 2010: 1,449,200
- Tourism budget in 2010: Between 1.1 and 4 million dollars

DESTINATION MELBOURNE

Destination Melbourne Ltd is the Regional Tourism Organisation for Melbourne. Our vision is to ensure that Melbourne is recognised as a compelling destination of outstanding visitor experiences. We provide industry leadership; advocacy on behalf of the visitor experience; and cost effective marketing programs that encourage visitation, dispersal and yield. We work with business; community and government to help grow Melbourne as an outstanding global visitor experience. Our key partners include: City of Melbourne, Melbourne Convention and Visitor Bureau, Tourism Victoria and the Victorian Major Events Company.

The participating cities

New York City

www.nycgo.com

New York is the most populous city in the United States of America and the centre of the New York Metropolitan Area, one of the most populous metropolitan areas in the world. The city is referred to as New York City or The City of New York to distinguish it from the State of New York, of which it is a part. A global power city, New York exerts a significant impact upon commerce, finance, media, art, fashion, research, technology, education, and entertainment. The home of the United Nations Headquarters, New York is an important centre for international diplomacy and has been described as the cultural capital of the world.

The Big Apple is, more than anything else, a wildly diverse urban ecosystem, and there's no better way to access the city's cornucopia of cultures than through the dinner plate. NYC's eating scene is a parade of superlatives culminating in a constellation of Michelin stars. From the Caribbean kitchens and soul food in Harlem to modern iterations of new American comfort cuisine downtown, New York offers endless opportunities to stamp your palate's passport.

- Population in 2010: 8,175,133
- International arrivals in 2010: 9,744,000
- Tourism budget in 2010: More than 11.1 million dollars

NYC & COMPANY

NYC & Company is New York City's official marketing, tourism and partnership organization. Our mission is to maximize travel and tourism opportunities throughout the five boroughs, build economic prosperity and spread the dynamic image of New York City around the world. With the launch of major interactive initiatives - including nycgo.com and the Official NYC Information Center - NYC & Company becomes the ultimate resource for visitors and residents to find everything they need about what to do and see in New York City.

Paris

www.parisinfo.com

Paris, France is one of the most fascinating and romantic cities in Europe and tourists visiting this wonderful city will find that things to see and do are almost limitless. Known as the 'City of Light', the beauty of Paris is overwhelming and its architectural and artistic heritage combine with undeniable appeal and world-class tourism to make any visit an unforgettable experience. Divided into a total of 20 different numbered districts ('arrondissements'), Paris spirals around the River Seine and comprises almost 400 different metro stations, meaning that finding your way around really is a breeze. The most familiar arrondissements, combining classicism and innovation, comprise the areas named Bastille, Champs-Élysée, Ile de la Cité, Louvre, Marais, Montmartre, Montparnasse, Opéra, the Latin Quarter, Saint-Germain des Près, Beaubourg.

- Population in 2011: 2,234,105
- International arrivals in 2011: 8,462,213
- Turnover in 2011: Over 7 billion euros
- Tourist tax revenue in 2011: 38.3 million euros



PARIS CONVENTION AND VISITORS BUREAU

The Paris Convention and Visitors Bureau was created in 1971 at the joint initiative of the Paris City Council and the Paris Chamber of Commerce and Industry. It carries out specific missions such as welcoming and informing visitors and promoting the destination in France and abroad as well as supporting Parisian tourism companies, among which 2,200 professionals are members of the PCVB.

The Bureau in figures:

- 6 tourist offices open all year round
- 6 kiosks and 30 seasonal staff for the « Welcome Ambassadors »
- 13 must-do itineraries in the « Paris for You! guidebook »
- 13,000 events presented on parisinfo.com
- 789,581 visitors welcomed in 2011
- 9,532 million visitors on its website parisinfo.com in 2011
- PCVB budget in 2011: 11,270 million euros, of which 8,130 million euros subsidies



Québec City is known for its history and beauty, but it is also a busy cultural destination with many festivals all year around. Old Québec, a UNESCO world heritage treasure, is alive with history. See for yourself with a visit to the Fortifications of Québec and the Citadel, the city's two main defensive works. Moving from military history to religious history, take in the stunning Notre-Dame-de-Québec Basilica-Cathedral, the Cathedral of the Holy Trinity, the Jesuits Chapel, and St. Andrew's Presbyterian Church. After stopping off at one of the city's many museums and interpretation centres, take a walking tour or a horse-drawn carriage ride to get a true feel for this unique historic district. Fine dining and shopping are an art form in Old Québec, particularly along rue Saint-Jean and rue Saint-Louis, where European charm adds a dash of flair to any outing.

- Population in 2010: 621,545
- International arrivals in 2010: 1,095,269
- Tourism budget in 2010: More than 11.1 million dollars

QUÉBEC CITY TOURISM

Québec City Tourism brings together near 1,000 member businesses in the tourism sector and is a department of the City of Québec since January 2002. As a regional tourism association, Québec City Tourism coordinates and represents the local tourism industry.

Its mission is to actively contribute to industry prosperity through integrated and coordinated marketing and development efforts (aimed at visitors as well as business clientele and the media), reception services for tourists, and information to the industry.

The participating cities



Quito



www.quito-turismo.gob.ec

At 10,000 ft (2850 m), Quito is breathtaking in more ways than one. Situated as it is, twenty-two miles from the Equator, a visitor would expect extremely hot weather but the altitude tempers that. There are no extremes in temperature, (see these averages) and year-round temperatures feel spring-like. There are two seasons, wet and dry, and for convenience sake, the wet season is termed “winter.” This makes Quito an all year-round destination, and a favoured location to learn Spanish with a language program. Quite apart from any other reason to travel in Ecuador, visitors like to spend time in Quito and the surrounding areas. Quito grew up and out from its colonial core, and now can be organized into three areas. South of Old Town is mainly residential, a working-class housing area. North of Old Town is modern Quito with high-rise buildings, shopping centres, the financial centre and major business centres. North of Quito is Mariscal Sucre airport, through which most visitors to Ecuador arrive and depart.

- Population in 2010: 2,239,191
- International arrivals in 2010: 470,000
- Tourism budget in 2010: Between 4.1 and 7 million dollars

QUITO TURISMO

Quito Turismo is the municipal company that works towards the tourism development of the Quito Metropolitan District. It is in charge of the organization and professionalization of the industry, such as improvements in the infrastructure, supplies and services offered by the city and its surroundings. Moreover, Quito Turismo carries out the promotion of the destination both nationwide and worldwide.



Rio de Janeiro



www.rioguiaoficial.com.br

Rio de Janeiro is the capital of tourism in Brazil. Rio is Brazil's trademark. Corcovado Mountain, with Christ the Redeemer is one of the New 7 Wonders of the World, a title awarded to the monument after an international campaign. There is also the Sugar Loaf, a mountain reached by a cable car in a spectacular ride, which offers amazing views of the city. Rio was elected the city with the most amicable inhabitants in the world. This is the biggest secret of the Marvelous City, the Carioca's spirit (Carioca is the native of Rio), which transforms all urban spaces into a mosaic of different attractions.

Copacabana, Ipanema, Leme, Leblon, the beaches in Rio, with their picturesque names and natural peculiarities, each has its own charms, which inspires visitors with wonder. The beaches and sites stimulate the interest of tourists and amaze all with their beauty and lively environment.

- Population in 2010: 6,320,446
- International arrivals in 2010: 1,610,000
- Tourism budget in 2010: Between 4.1 and 7 million dollars



RIOTUR

The Tourism Secretariat and RIOTUR – The City of Rio Tourism Authority are always focused on increasing tourism flow, from domestic and international markets, into the city of Rio de Janeiro, setting in motion the tourism chain of production, supporting the tourist trade to increase, both, the MICE and leisure segments while strengthening the city's economy.

In addition to that, it is incumbent upon RIOTUR to develop, implement and keep a strategic tourism plan, to maintain the information posts for tourists, to coordinate the conducting and execution of studies, surveys and programs relevant to developing tourist operations in the Municipality, as well as producing or supporting significant events in the City, highlighting New Year's Eve and the Carnival.



São Paulo

www.spturis.com

São Paulo is the name of both one of States of Brazil, and its respective capital. The city of São Paulo is the largest and richest in Brazil and one of the largest in the World. With a booming economy, Brazil is quickly becoming an important player in global politics and finance. São Paulo is the finance and business capital of Brazil. The metropolis has significant cultural, economic and political influence both nationally and internationally. It houses several important monuments, parks and museums such as the Latin American Memorial, the Museum of the Portuguese Language, São Paulo Museum of Art, Museum of Ipiranga and the Ibirapuera Park. The Paulista Avenue is the most important financial centre of São Paulo. The city holds many high profile events, like the São Paulo Art Biennial, the Brazil Grand Prix Formula 1 São Paulo, São Paulo Fashion Week, ATP Brazil Open, and the São Paulo Indy 300.

- Population in 2010: 11,037,593
- International arrivals in 2010: 1,656,495
- Tourism budget in 2010: Less than 1 million dollars

SPTURIS

São Paulo Turismo, S/A. The City of São Paulo's official tourism agency has as its mission to position and promote São Paulo as the business, information and entertainment capital of Latin America, highlighting the city's cultural and avantgarde character, endeavoring to strengthen it as a tourist destination, seeking to expand diverse sectors of the economy and to increase the quality of life of its citizens.

The participating cities

Shanghai

www.meet-in-shanghai.net

Shanghai, Hu for short, is a renowned international metropolis drawing more and more attention from all over the world. Situated on the estuary of Yangtze River, it serves as the most influential economic, financial, international trade, cultural, science and technology centre in Eastern China. Also it is a popular destination for visitors to sense the pulsating development of the country.

In addition to its modernization, the city's multicultural flair endows it with a unique glamour. Here, one finds the perfect blend of cultures, the modern and the traditional, and the western and the oriental. New skyscrapers and old Shikumen together define the skyline of Shanghai. Western customs and Chinese traditions intertwine and form Shanghai's culture, making a visitor's stay truly memorable.

- Population in 2010: 23,019,148
- International arrivals in 2010: 8,175,700
- Tourism budget in 2010: Less than 1 million dollars

SHANGAI MUNICIPAL TOURISM ADMINISTRATION

Shanghai Municipal Tourism Administration (SMTA), under the Shanghai Municipal Government, is the regulating arm in charge of drafting the master plans and strategies for developing the city's travel and tourism industry, implementing trade policies and regulations and coordinating the operations of related organs and businesses in the industry. It is also responsible for promoting the travel industry and travel products in both domestic and overseas markets.

Under the SMTA is a specific department - International Tourism Promotion Department responsible for promoting Shanghai as an ideal MICE destination as well as the city's MICE industry. Its major responsibility is to market Shanghai in international meeting and event industry, organize or coordinate the organization of meetings in Shanghai and provide training to the people in the MICE industry.

Vienna

<http://b2b.wien.info/en>

Vienna is situated in the North-East of Austria and lies on the banks of the majestic Danube River. Surrounded by the natural beauty of the Wachau region, the Vienna woods ('Wiener Wald') and with numerous green expanses and parks Vienna is an exceptionally agreeable city. As a result of Vienna being the capital of Austria and totally in keeping with the international traditions of the Habsburg Empire its population is highly diverse. Even though birth-rates are not particularly high, the Viennese population is continually growing due to an influx from both inside and outside of Austria. While Austria as a whole reports an average 73% of its population as Roman Catholics, this percentage drops to 50% in Vienna. This is partly due to immigration, but mostly due to the secular nature that generally characterizes urban centres. Currently, approximately 20% of Austria's population live in Vienna. With a busy cultural calendar and numerous sights Vienna is a year-round destination. Some institutions like the Vienna Boys' Choir, Spanish Riding School and some theatre houses take a summer break but summer-specific events like open air cinemas and festivals compensate for this.



- Population in 2010: 1,703,000
- International arrivals in 2010: 9,026,220
- Tourism budget in 2010: More than 11.1 million dollars

VIENNA TOURIST BOARD

The Vienna Tourist Board is the official destination marketing agency for the tourism sector of the city. It provides many service offers, tips and much information for Viennese tourist businesses, such as: maintains an information well for data and information relating to markets, promotes the offers at each destination, represents Vienna worldwide at trade fairs and workshops and organizes partnerships within the travel industry as well as from industry, performs media tasks, assists journalists and facilitates international reporting on Vienna in relevant media in 30 markets, maintains a worldwide Congress Bureau. events in the City, highlighting New Year's Eve and the Carnival.



An interesting and graceful city, Zaragoza stands in the northeastern quarter of Spain and is the capital city of the Aragon area. Zaragoza is the fifth-largest city in the whole of Spain and Zaragoza's wealth and prosperity is reflected in the city's spacious boulevards, extensive shopping districts, lively bars and fine dining. Centred around the scenic River Ebro, Zaragoza is known for its Roman heritage, being home to the Murallas Romanas, ancient remains of Roman walls, which once surrounded the central area of Zaragoza. Throughout the year, Zaragoza hosts many significant festivals, which appeal to both tourists and locals. Events worth noting include Zaragoza's Fiestas del Pilar during the second week each October, featuring a breathtaking mountain of flowers in the central Plaza del Pilar square.

- Population in 2010: 696,656
- International arrivals in 2010: 183,471
- Tourism budget in 2010: Between 1.1 and 4 million dollars

ZARAGOZA TOURISM

Zaragoza Tourism is the Municipal Tourism Organisation of the city of Zaragoza. It was created on 1996 by the City Council with a double purpose: promoting Zaragoza as a Tourism and Meeting destination, as well as making its tourist, cultural and leisure offers richer and better known among citizens and visitors both foreigner and local. From the beginning, Zaragoza Tourism incorporated public and private tourist offer into its promotional strategies, which contributed to consolidate the city as an urban tourist destination. Zaragoza Tourism main departments are: Information; Promotion; Communication; and Zaragoza Convention Bureau.

UNWTO affiliate members survey: what do our cities say?



As a result of the surveys conducted, the tourism bodies of the 21 participating cities identified a series of priority areas for their work. These areas were:

- a) **Economic Impact**
- b) **Governance and Planning**
- c) **Promotion and Marketing**
- d) **Human Resources**
- e) **Responsible Tourism: cultural and natural heritage**
- f) **Innovation, and**
- g) **Visitor Experience**

The key findings are as follows:

a) **Economic impact**

G20 World leaders have recognised the importance of tourism as a driver of jobs and economic recovery. The Leaders' Declaration from the annual meeting of the G20 world leaders, held in Los Cabos, Mexico on 18-19 June, recognises the role of 'Travel and Tourism as a vehicle for job creation, economic growth and development' (UNWTO / WTTC press release G20 leaders' Declaration).

According to the UNWTO Annual Report 2011, Tourism is responsible for 5% of Global Domestic Product (GDP), 30% of the world's services exports and one in every twelve jobs, yet is often underestimated by decision-makers. 81% of the cities participating in the report confirmed that jobs in the travel sector increased in the last 5 years and that they do develop initiatives to improve the benefits of tourism to the local communities. Nonetheless, our research has shown that considerable analysis should be done to reflect the real impact of tourism on national economies.

Nevertheless, UNWTO research has demonstrated the need for deeper and further analysis on the subject.

Although 67% of the participating cities periodically measure the economic impact of tourism, the main interest of the participating cities focuses on improving the measurement of the impact of tourism at the city level and obtaining more precise information on the economic benefits of tourism that are derived for the local community (e.g., in terms of employment, etc.).

City of Cape Town: update on the economic value of tourism

Tourism is one of the main pillars and economic drivers of the South African economy and it has been a continuous endeavour of the City of Cape Town to create a standard reference for information regarding the economic value of the tourism sector, therefore it has worked on a project to calculate the economic value of tourism specific to the City of Cape Town.



The research consisted of the analysis of two factors:

- **Demand side: reviewing tourism data and surveys to indicate the direct spend by tourists in Cape Town**
- **Supply side: a survey on all the Cape Town Tourism members**

In 2009, tourism in South Africa showed a great resilience with a positive growth figure compared to 2008. Key figures are as follows:

- 5.4% increase in January
- 6.3% increase in April and May
- 11.5% increase in July and August
- 1.8% increase in the fourth quarter

In 2009 South Africa received 10 million foreign visitors, that is, 3% increase compared to 2008. From 2005 there has been an annual increase in the number of international tourists visiting South Africa until 2007 when the percentage growth declines as a consequence of the global economic crisis. This project undertaken by the City of Cape Town reveals that there has been a significant increase in the economic value of tourism since 2008 both on the demand and supply side.

Tourism economic contribution to the city of Buenos Aires

(Observatorio Turístico de la Ciudad de Buenos Aires)

Case Study

This was a joint study carried out between the City of Buenos Aires' tourism board and Ministry of Culture in order to effectively calculate the economic contribution of the tourism sector to the city's economy. A study on this scale has been unprecedented in Buenos Aires, though smaller evaluations have been carried out at national level by the Camera Argentina de Turismo over the previous 5 years. The Argentinian Ministry of Tourism has also worked with other bodies in order to compile and systematize data relating to tourism's economic impact at national level. This study has been considered by the city's tourism board as very valuable, not just for the city's tourism sector but for the whole country as it strongly indicates tourism's contribution to the national economy.

The creation of a Tourism Observatory for the City of Buenos Aires was intended at aiming to contribute to the city's tourism development and has considerably helped the city government in evaluating the impact of tourism on the city's economy and infrastructure. At an operational level, it has allowed for a more rigorous and methodical economic analysis of the indicators of tourism evolution in the city.

Three main indicators were used to measure the economic impact of tourism in the City of Buenos Aires:

- Impact on the 'Producto Bruto Geografico' (Gross Product of the Geographical area of the city), using an estimation of supply and demand
- Impact on employment
- Impact on local tax revenues



In 2010 the city of Buenos Aires registered 10 million arrivals from domestic and international tourists. This figure had been growing for several years, only interrupted by short term shocks such as the economic crisis of 2008 and the effects of swine flu on tourism in Latin America. In total it is estimated that in 2010 tourism accounted for 7.6% of the city's gross product, surpassing the national average of 6.5%.

It is estimated that 3.41bn USD were generated from inbound and outbound tourism activity in the city of Buenos Aires in 2010. Allowing for the effects of the global economic crisis on tourism in the city, it must be noted that this figure represents an increase in spending of 8% in comparison to 2008. It must be noted that in addition to the 3.4bn USD generated from tourism activity in 2010, a further 1.3bn USD were invested by the public bodies in the city's tourism infrastructure in that year.

When we compare the impact of tourism on the city of Buenos Aires (7.63% of gross municipal product in 2010) and the impact at national level (6.54% of GDP in 2010) we can observe that tourism represents a larger proportion of the gross product in the city than is the case for the national average. An evaluation of this share of GDP demonstrates that the economic impact on the city and the country have grown at the same rate over the past 5 years.

With regards to tourism's effect on employment, this study used social-security registrations as the key indicator. It was estimated that in 2010, a total of 337,000 people were registered as working in the tourism sector; 189,000 of these were residents of the city.

and 149,000 residents of Buenos Aires. From this, it is estimated that around 13.1% of jobs in Buenos Aires can be directly and indirectly attributed to tourism (the figure at national level was 10.4% or a total of 700,000 in 2010). The largest proportion of these jobs (31.1%) was bar and restaurants services followed by 23% in motorised passenger transport, 11.7% in audio-visual entertainment, 9% in sporting and outdoor activities and 7.8% in accommodation. It must be noted that 1 in 3 jobs in tourism

in Argentina is located in Buenos Aires and that employment in tourism in the city has risen in line with economic growth at national level (it was also not adversely affected by the crises that hit the sector in 2009).

Finally, tax revenue from tourism was measured in the city. It was found that 7.45% of the city's tax income came from tourism products and services (this figure was 6.6% at national level).

b) Governance and planning

Tourism plays an important role in national and urban economies in terms of employment, income, taxes and maintenance of urban infrastructure and extension of public services. Urban tourism depends on the physically built environment such as attractions of architectural significance and on the other hand helps to maintain and conserve historical buildings.

In the year 2007 the Bureau of Tourism (Ente de Turismo) was instituted by a local law, as an autarkic entity in the Ministry of Culture of Buenos Aires City. It was created, as it happens in other successful experiences, with the purpose of planning, designing and implementing policies to promote, to develop and to foster tourism as a strategic socio economic activity for the City. Among

its main activities, it is responsible for marketing (in the country and abroad), designing and implementing new products and areas as well as producing data and reports and documents.

The Chairperson of the Bureau is the Ministry of Culture and is accompanied by a board of directors that is made up with representatives from both the private and the public sectors, and there is an Executive Director who is in charge of the activities of the Bureau.

The design was intended at aligning both culture and tourism areas of the City government to be a leading case in the development the concept of cultural tourism in an urban environment.

Tourism Expenditure in the city of Buenos Aires

Years	2008	2009	2010
International and domestic tourism to CABA			
International tourist arrivals through Ezeiza	2,105,314	1,817,837	2,365,823
International tourist arrivals through the Port	262,189	239,056	272,661
International tourist arrivals through Retiro	-	365,778	378,546 1
Total international tourists	2,367,503	2,422,671	3,017,030
Domestic tourists	6,688,803	5,967,668	6,995,261 2
Total tourists	9,056,306	8,390,339	10,012,291
International and domestic tourism expenditure in CABA			
Expenditure of international tourists through Ezeiza, Aeroparque and Puerto (US\$)	2,152,202,099	1,760,979,698	2,322,160,070
Expenditure of domestic tourists (US\$)	1,004,300,719	642,340,159	1,087,652,372 3
Total expenditure (US\$)	3,156,502,818	2,403,319,858	3,409,812,442

Destination Melbourne. Good Governance



Destination Melbourne is a 'not for profit' Company Limited by Guarantee. We embarked on a program of Good Governance just over three years ago after the Board and management recognised that the business had evolved beyond its original constitution.

While Destination Melbourne was formed as a representative organisation more than a decade ago, the board recognised the importance of recruiting skilled based directors to support the growth of the business.

Destination Melbourne has a remarkably cohesive board due to a shared commitment to the values underpinning the business. The need to balance representation and skills was enhanced by a commitment to encouraging active engagement in the business.

In 2009, there was a shift in thinking. The management and board were working well together and there were high levels of trust and co-operation, but it was recognised that if the organisation was to take the next step we needed to revisit the governance and compliance regime at Destination Melbourne.

Destination Melbourne is not a large business, we employ 13 people and turnover A\$3.5 million per annum. We had to make a conscious effort to work on our business, not just in it. We drew on the individual expertise of directors, in particular our chairperson, Tina Leonard a legal practitioner.

We were also able to leverage support through our membership of the Australian Institute of Company Directors (AICD) and our registration with the Australian Tourism Accreditation Program (ATAP). The information sessions, templates and benchmarking information provided by both AICD and ATAP were invaluable. By focussing on Governance and compliance at the same time we were able to put our thinking into action that delivered tangible outcomes including:

- **Clear selection process for Board Members**
- **Code of Conduct for Board Members**
- **Register of interests**
- **Conflict of Interest Policies**
- **Corporate Social and Environmental Policy**
- **A review of Board Performance**
- **Well defined company values**
- **Robust strategic planning process**

Developing good policies, revising our Company Constitution and introducing a more systematic approach to compliance required a shared commitment by management and Board. We accept there will always be room for improvement in the way we do business, but we are now confident that we are equipped to make the transition from good to great.

Destination Melbourne. 3 Year Strategic Plan 2012-2015

Case Study



Destination Melbourne's 2012 - 15 Strategic Plan was developed through a process of consultation with Board; key stakeholders; customers; suppliers; graduates of the Melbourne Tourism Industry Leadership Program and competitor analysis. At the core of our discovery process was the question: 'How does Destination Melbourne progress from 'Good to Great'?

Through the planning process they identified a number of challenges and opportunities which have been addressed in this Strategic Plan:

Destination Melbourne has a clear articulated role supporting the delivery of the visitor experience in partnership with our key stakeholders. This plan reflects further evolution of the business. This includes changing the language we use to describe what we do and how we do it. We retain the key functions associated with our core business and extend to a new approach that sees Destination Melbourne take a broader leadership role in Melbourne (Ref: Destination Melbourne 3 Year Strategic Plan 2012 – 2015)

Challenges	Opportunities
Dynamic operating environment requiring flexibility and responsiveness	Strategic plan that sets a direction that remains relevant and beneficial to those who engage with Destination Melbourne
Destination Melbourne is widely appreciated by its stakeholders and a focal point for industry, government and the community, however, there is still a lack of clarity and understanding about our role and broader industry structure	Destination Melbourne has the opportunity to shape what we do and how we go about our business and to communicate our role to stakeholders
Melbourne is ranked as the number one domestic holiday destination in Australia. but faces renewed competition from other capital cities	Leverage our destination status with outstanding visitor experiences
Growing visitor industry interest in emerging markets such as China	Educate and inform the visitor industry about the benefits of supporting this emerging market
Ensuring small business can gain maximum benefit from our co-operative marketing products and programs	Existing product suite is strong, however we need to respond to the demand for digital visitor products as well as support small business entry in co-operative marketing opportunities
Building leadership capability within the industry	The industry wants us to continue investing in services like the Melbourne Tourism Industry Leadership Program
Ensuring sustainable revenue streams - no other tourism body does what we do without a membership base and significant Government funding	Destination Melbourne's business model is unique, it allow us to approach challenges with a different mindset
There is no one organisation who is the champion for the visitor experience across Melbourne	We expand our role to determine ways to put the visitor experience at the center of how Melbourne is perceived as a destination
Many of our key stakeholders do not perceive themselves as part of the tourism industry	Opportunity to change how we engage and the language we use with a broader range of stakeholders that comprise the visitor industry

c) Promotion and Marketing

City tourism has become increasingly competitive, destinations have to focus and specialize to stay ahead of the pack and the need for a clear strategy becomes crucial for effectively managing the destination. A tourism marketing programme to support the brand and attract visitors through an integrated marketing mix: product, price, positioning and promotion (UNWTO “Policy and Practice for Global Tourism”, 2010).

Place promotion is a well-known feature of contemporary urban life (Kearns and Philo, 1993:18) and of city marketing campaigns. As a result of marketing processes, place images have become closely associated with each city in the creation of perceptual global place maps. In 1900, the world’s great cities were almost all in Europe and North America. Since then cities in Asia have grown in the last century (Spearritt, 2002). Cities such as Tokyo, Seoul or Beijing are becoming more and more popular and competing for global share.

International alliances have also helped to strengthen the importance of city tourism; this is the case with “European Cities Marketing”. Innovative marketing strategies should be implemented not just to provide the city with a consistent image but to provide significant revenue and added value to its residents.

The participating cities are particularly interested in statistics and in rigorous and reliable analysis regarding their positioning, priority markets, and customers, as well as so-called “market intelligence”. In fact, in 90% of them, their research and analysis departments incorporate statistics and analysis in the management of their organization, and 80% carry out market intelligence activities.

Cities use statistics and analysis to obtain the information they need to create their marketing strategies and focus on existing customers as well as attracting potential new ones. Our survey

shows different initiatives to collect data but all with one distinctive objective: delivering the right marketing campaign and product to the right market segment. Quebec City use Marketing intelligence to do a follow-up on strategic tourism sectors and trends. New York instead uses visitors volume and profiles to determine the economic Impact of City Tourism as well as forecasts and strategic opportunities together with market research.

It is also crucial to involve as many stakeholders as possible in market analysis and data research, a good example could be the case of Barcelona: Turisme de Barcelona considers market intelligence a key tool to focus on the following activities:

- **Monthly report on tourism activities**
- **Hotel information not only in Barcelona city but also the metropolitan area – outskirts?**
- **Surveys on Barcelona hotel situation**
- **Activities related to tourism developed in Barcelona**
- **Statistics on MICE segment**
- **Report on food tourism**
- **Report on Barcelona’s main target markets BCNSHOP**
- **Customer Satisfaction survey: Barcelona Card**

With this information in mind Barcelona was able to develop targeted promotion and marketing campaigns focusing on the different activities they offered, that is, MICE, shopping, food tourism, sports tourism, luxury tourism as well as cultural tourism, cruise tourism and LGTB tourism among others.

Does this mean that each city’s brand is embraced by all stakeholders? According to our survey 85% say the brand is embraced by all involved, however 15% believe the city lacks the approval of all stakeholders. There are clear examples like New York City with a very strong brand image embraced not

Destination Melbourne – our goals



just by all stakeholders but the reality shows a need to develop strategies and marketing activities that will strengthen our cities brands. As Simon Anholt clearly stated in his Introduction Essay in Handbook on Tourism Destination Branding (Published by UNWTO and ETC 2009): a destination with a powerful and positive image needs to do less work and spend less money on promoting itself to the marketplace, because the marketplace already believes what it is telling them. It merely has to help buyers find and purchase the product.

The majority of the participating cities (72%) work together with the private sector in the development of marketing campaigns and product positioning. Lisbon, for example has a national model, each region (Lisbon in this case) is responsible for setting the activities plan each year. Its financing is done with the following rule: for each collected 1 Euro within the private sector, 1 must be added by the regional public partners. Once this is accomplished, the national tourism board adds a maximum of 4 to the budget.

Another good example showcasing a public-private partnership is the one provided by Quito Tourism Board. They have established a Development & Promotion Trust in order to execute its Strategy Plan (Plan Q), the budget through taxes paid by the visitors and this money is invested in promotion & Development activities. The private sector participates with its know-how to define activities and actions.

Successful city tourism management should recognise the importance of a proper marketing strategy that comprises a wide range of different activities to attract established and new customers and support services developed through a public – private partnership that position and deliver the brand promise to their customers. The challenge is to deliver a product that targets tourists as well as residents.

d) Products

Tourism Product Development is a key factor in the overall experience demanded by tourists visiting cities or other types of destinations. Understanding market trends through market analysis will help create a strategy that will match tourists' needs and demands.

Tourism Product destination is made up of three factors:

- **Experiential-shopping, dining and entertainment, festivals, activities...**
- **Emotional-cultural and historic resources, hospitality...**
- **Physical-infrastructure, natural resources, restaurants, accommodation...**

(Source: Handbook on Tourism Product Development. ETC/UNWTO 2011)



Tourists expect a certain level of new experiences when visiting a city, they want to 'taste' new flavours, and they want to spend money on new attractions. Destination management organizations and their stakeholders need to understand how tourism products develop, grow, mature and then decline so that they can tailor their marketing strategies accordingly (Policy and Practice for Global Tourism. UNWTO 2010)

Since demand changes, so then should Tourism Product Development. This is part of an ongoing process that addresses the needs and uncertainties of the marketplace and involves government and investors in order to provide a long term strategy for product development.

The participating cities expressed a high level of interest in the development of new products. They also showed great interest in the MICE segment and mega-events. In fact, 81% of cities claim to have an active strategy to attract mega-events and only two cities do not have a specific Convention Bureau as a tool to attract and manage the MICE segment.

86% of our surveyed cities develop initiatives to reinvent their products and remain attractive to the visitor. Kazan in the Republic of Tatarstan, Russia, focuses on the reconstruction of its historical buildings as well as the development of the city's buildings.

However, only 29% of the cities said that they were carrying out actions to manage the life cycle of products infrastructure, whereas cities such as Québec organise special events for all seasons based on market trends and specific groups: single, couple, families with children. Thanks to this effort, activities such as Red Bull Crashed Ice or Cirque du Soleil street show are now very much related with Québec's product offering and brand.

Achieving a 'mix' of tourism products that meet the tourists' requirement is the best approach to a successful tourism product development.

Tourism Development Framework for Cape Town. Tourism Niche Market Study

Case Study



Tourism has been selected by the Council as one of the economic activities which will play an important role in Cape Town's future. The Council has developed a Tourism Development Framework that sets out the functions and projects that the Council needs to undertake in order to support the development of tourism in Cape Town. The Tourism Development Framework describes how the City plans to work with partners in the public and private sectors and communities to implement the Framework.

The Tourism Development Framework provides directives for preparing Cape Town to be able to provide the products and services that will attract tourists; it also recommends actions to be taken to ensure that the people of Cape Town benefit economically and socially from the income generated by tourism.

What is included in the Tourism Development Framework?

The Policy Review provides a summary of the principles, guidelines and strategies contained in related documents at national, provincial and city level.

The Situation Analysis contains an overview of the following destination components:

Tourism products

The natural, cultural, man-made attractions and resources that draw visitors to Cape Town.

Tourist facilities & amenities

The accommodation places (B&Bs, guest houses, hotels, etc.) where tourist stay, as well as tourist information centres.

Markets

The people who visit Cape Town, their characteristics and their opinions and expectations of our tourist products, facilities and service levels.

Infrastructure

The transport infrastructure that tourists use to travel to and within Cape Town, as well as road signs, landscaping, ablution facilities, cleansing, etc.

The tourism spatial framework identifies Tourism Development Areas throughout the city. The Tourism Spatial Framework provides recommendations regarding the actions that can be taken in each Tourism Development Area in order to:

- Increase the attractiveness of the area by developing unique products and experiences that build on the resources of the area;
- Make it easier for tourists to get to and move around the area; and
- Help local people to develop tourism businesses and share in the benefits of tourism.
- The key objective of the Tourism Investment and Implementation Framework is to
- Identify activities and projects which can be placed into budgeting and business planning processes and capital expenditure programmes.
- Linking Destination marketing and Product development to ensure that they meet and exceed the promises made in all marketing activities through suitable product development

e) Human resources

There is no doubt regarding tourism and its role in global economy. It provides employment for millions of people, and despite crisis and natural disasters this is an industry that has proven to be resilient.

This is also a diverse and complex industry where employees are an essential part of the product delivery; employees play an important role and have the potential to provide differentiation against competitors. Cheng and Brown (1996) considered the link between human resources management

and organizational objectives to be a key enabler of effective recruitment, development, motivation and retention of staff in pursuit of competitive advantage.

Unfortunately there is a lack of professional training and experience at a management level to successfully lead in the current competitive climate. Companies have to differentiate from competition and employees not just at front line level but also management level can make a huge difference to the end customer and a great impact on local economies.

Paris, one of the most attractive and most visited cities in the world is a good example to show the importance of Human Resources and travel industry. In 2009, jobs in tourism increased slightly in Paris, contrary to the general trend. 160,677 was the number of directly employed staff in tourism related activities in Paris (+0.7%, i.e. 1,046 additional jobs compared to 2008), that is 13% of total salaried employment in Paris, which accounted for 1,234,948 employees at 31/12/2009 (-1.5%).

Paris accounts for:

- **43.9% of the 366,223 tourist jobs in the Île-de-France region,**
- **13.6% of the 1,179,474 national tourist jobs**

There is no doubt about it, millions of people work in tourism making the sector one of the largest employers. UNWTO works closely with its Member States to advance tourism education and training in the sector. Through assessments, training courses and certifications, UNWTO continues to reduce the gap between the requirements of the sector and the skills acquired by its future professionals (UNWTO Annual Report 2011).

Within this area, the participating cities focus the greatest attention on two factors: "Capacity building for quality performance" and "Tourism awareness of the local community". However, only 52% of all cities participating in the Cities 2012 survey confirmed having capacity building programmes for quality performance: Tourism Excellence Programmes; Technical assistance in order to incorporate quality and sustainability; Training in quality service, sustainable tourism and Food Management; Training on Social Media and other new technologies...

f) Responsible Tourism: cultural and natural heritage

Heritage is our legacy from the past, what we live with today, and what we pass on to future generations. Our cultural and natural heritage are both irreplaceable sources of life and inspiration. Places as unique and diverse as the wilds of East Africa's Serengeti, the Pyramids of Egypt, the Great Barrier

Reef in Australia and the Baroque cathedrals of Latin America make up our world's heritage.

What makes the concept of World Heritage exceptional is its universal application. World Heritage sites belong to all the peoples of the world, irrespective of the territory on which they are located.

The United Nations Educational, Scientific and Cultural Organization (UNESCO) seeks to encourage the identification, protection and preservation of cultural and natural heritage around the world considered to be of outstanding value to humanity. This is embodied in an international treaty called the Convention concerning the Protection of the World Cultural and Natural Heritage, adopted by UNESCO in 1972. UNESCO's World Heritage mission is to:

- **Encourage countries to sign the World Heritage Convention and to ensure the protection of their natural and cultural heritage;**
- **Encourage State Parties to the Convention to nominate sites within their national territory for inclusion on the World Heritage List;**
- **Encourage State Parties to establish management plans and set up reporting systems on the state of conservation of their World Heritage sites;**
- **Help State Parties safeguard World Heritage properties by providing technical assistance and professional training;**
- **Provide emergency assistance for World Heritage sites in immediate danger;**
- **Support State Parties' public awareness-building activities for World Heritage conservation;**
- **Encourage participation of the local population in the preservation of their cultural and natural heritage;**
- **Encourage international cooperation in the conservation of our world's cultural and natural heritage.**

World's heritage is one of the most important elements in tourism product offering and also one of the main challenges for this sector. UNWTO has developed a specific programme on tourism management at heritage sites, building on the Organization's work in this area, to facilitate the development of policy and operational guidelines to handle tourist congestion at cultural and natural heritage sites (UNWTO Annual Report 2011). One of the issues brought to light by survey of the cities is the almost generalized lack of involvement in the field of cultural or natural heritage by the local DMOs, despite the enormous tourist attraction factor of these resources.



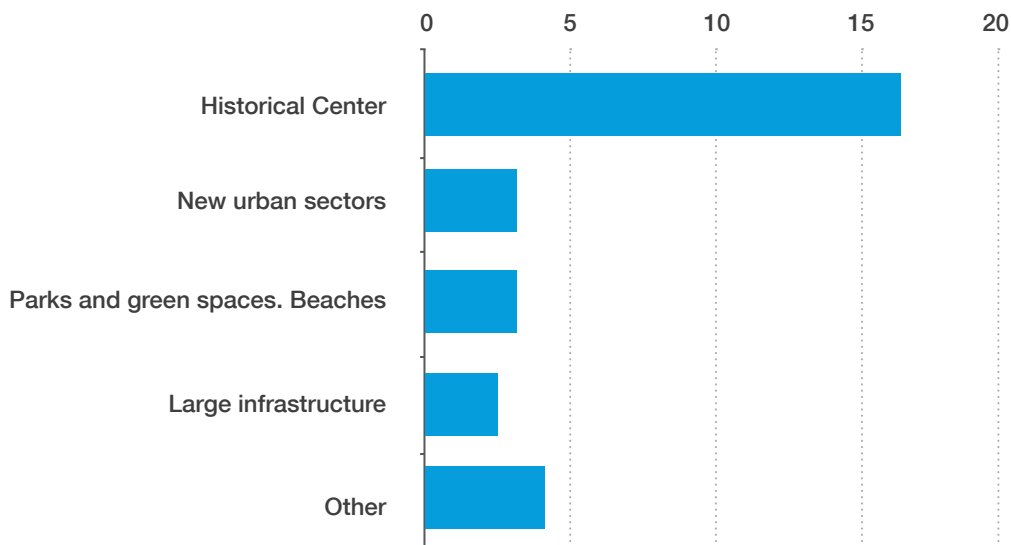
All destinations have something to offer but historic cities offer the visitor a story about its people, its traditions, its past; this type of tourism offers the opportunity to develop many different products: museums, historical sites, gastronomy, clothes... Despite the importance of this product in the overall tourism product offering in cities, one of its main challenges is the need to make the local community recognise the attraction cultural heritage can have for visitors and the economic impact these visitors can have on the local community and the conservation of the historical sites in the city. It should be emphasized here that more than half of the participating cities carry out awareness-raising campaigns among local residents in order to highlight the importance of tourism to the socioeconomic development of the city.

Athens and its Acropolis are universal symbols of the classical spirit and civilization and one of the greatest architectural and artistic complexes in a city. In order to preserve its historic heritage, Athens coordinates different types of initiatives with Central Government (Ministry of Culture, other Public organizations) and City Services and Organizations to obtain as much information as possible about the visitors' experience as well as data that can help with conservation such as surveys, observations, needs and general flow of information about visitors (trade and leisure), remarks and requests.

Kazan is the capital and largest city of the Republic of Tatarstan, Russia. The Kazan Kremlin is a World Heritage Site dating from the Muslim period of the Golden Horde and the Kazan Khanate. It was conquered by Ivan the Terrible in 1552 and became the Christian See of the Volga Land. The only surviving Tatar fortress in Russia and an important place of pilgrimage, the Kazan Kremlin consists of an outstanding group of historic buildings dating from the 16th to 19th centuries. The Kazan Kremlin complex represents exceptional testimony of historical continuity and cultural diversity over a long period of time and its key monuments represent an outstanding example of a synthesis of Tatar and Russian influences in architecture, integrating different cultures (Bulgar, Golden Horde, Tatar, Italian, and Russian), as well as showing the impact of Islam and Christianity (Source: unesco.org)

Kazan is focusing on the reconstruction of the historical city centre through different departments in the city's government. The tourism department promotes these venues to potential tourists. Kazan's objective is for its cultural sites to become one of the city's symbol and help increase the number of visitors to the city, however this sometimes is a difficult task due to the different products visitors to the city request.

Other examples of cultural heritage management include Old Quebec city with regulatory policy controlling the volume of visitors or Vienna where cultural heritage is the responsibility of the tourism department and managing its heritage is part of the city's responsibilities.



The majority of cities surveyed (76%), aware of their duty to provide accessible tourism for all, carried out measures to facilitate the enjoyment of the tourism experience on the part of all visitors, without discrimination, as part of their annual programmes of work.

g) Innovation

Technological progress has always been a key factor in this industry's growth; technology offers tourists a seamless travel experience thanks to the development of new web based applications, booking engines and CRM programmes. Technology covers every step throughout the tourist experience, that is, from the moment they plan a trip, search through internet and book to the moment they arrive and enjoy their destination.

Technology is constantly evolving and competition is fierce. Only those companies that lead in travel research and booking feature improvements as well as CRM programs will be able to survive. It has also changed the way people do business, communicate research and share information with others.

There was notable interest among the cities surveyed (70%) in developing and promoting innovative products. However, our survey shows that only 53% of the cities promote actions to encourage a competitive climate for innovation, and less than half (47%) said they promoted the development of new business models.

Vienna, for example, confirms that innovation is a key performance indicator and they encourage players in the tourist industry in Vienna to contribute with innovative ideas and they also try to motivate them through workshops or seminars to see innovation as a continuous growing process for their own businesses.

With the emergence of Web 2.0 and social media content, travellers are increasingly interacting and sharing their own

experiences and this is becoming extremely influential in tourism. Organizations and companies need to keep track of what their customers are saying and build a close relationship with them in order to understand their needs and requirements. This approach will enable creating target market campaigns and offer the right product to each and every tourist. All cities involved in the project CITIES 2012 use IT to create new tools that facilitate interaction with visitors and tourists.

São Paulo in Brazil has recently launched the app SP MOBILE for iOS and Android platforms. An app that shows the visitor all the attractions, restaurants, leisure and culture options, as well as the transportation system. Quebec instead focuses on offering a user-friendly website where visitors can easily and rapidly find the information they need or plan their trip; they also integrate a hotel booking website to help visitors find a room. New York, apart from its vibrant website where visitors can find all the relevant information about the city, have been early adopters of Twitter for outreach and feedback; they also use QR codes and High tech visitor centres.

Cities integrating new technologies in the overall product, marketing and communications strategies are more likely to reach customers and provide them with the right choice of products than those that are not. This is a space where public – private partnership become crucial to develop the right tools; the city of Quito, Peru, promotes a yearly open bid to the private sector to present their proposals in terms of new and innovative products. Quito Tourism selects the best proposal and provides the winner with the necessary technical assistance to put in action the project.

"Smart cities" or cities with e-services – a concept that still needs to gain a higher profile – are becoming increasingly important since they have to use information and communication technologies to deliver services to their citizens and those visiting. This is gradually becoming an important factor in



the city's development and its approach to locals as well as tourists. Zaragoza for instance has integrated Wi-Fi connexion in most of the city, offers citizens a smart card and monitors public transport through satellite technology. Touch screens are available for visitors at tourist offices.

h) Visitor experience

When it comes to city tourism it is clear that not only tourists make use of the infrastructures and activities cities offer and boundaries between these two items are gradually dissolving. Travel is easier, and thanks to new technologies we can all experience the excitement of visiting a city from the comfort of our homes. It is also more difficult to distinguish residents from tourists. Locals enjoy the same activities as visitors, and consume 'The new urban culture' (Judd, 2003 p.32). On the other hand, many tourists enjoy the city but they do not consider themselves to be tourists, for example those visiting friends and family or those on a business trip.

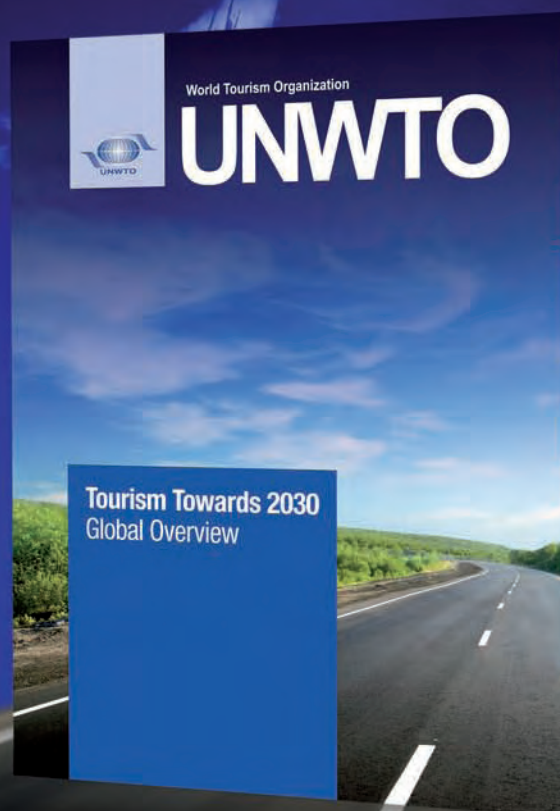
The tourist experience of the city has to be carefully analysed, some city tourists will be happy visiting iconic attractions whereas others will be looking for a more 'authentic' and sophisticated experience, and those frequent visitors will no longer seek the tourist sites and will develop a sense of belonging. The boundaries between city residents and their experiences and those visiting are gradually dissolving and this is also contributing to the shaping and the renewal of certain areas within the city and the overall urban change. 90% of the cities that participated in our survey are highly interested in accurately evaluating the experience of their visitors and therefore evaluate the tourist experience through surveys and market research. Visitor safety is the highest priority and concern in this area for the cities surveyed. In fact, half of them do not have systems or tools to monitor and improve on this aspect.

Which areas of the city are the most visited by tourists?

Our survey clearly shows that for most visitors historical sites are the most attractive activities a city can offer followed by new urban sectors.

For example, Berlin is, in itself, living history with everything concerning the former Berlin Wall, whereas New York is all about Central business & entertainment districts. Parks and museums, cultural organizations, historic sites and iconic neighbourhoods.

The key for the destination is to develop and present the range of products and services offered in such a way that the tourist is attracted to the destination but does not expect more than can be delivered (Handbook on Tourism Product Development ETC/UNWTO 2011).



Tourism Towards 2030

Global Overview

Presented at the UNWTO General Assembly in October 2011, Tourism Towards 2030 is a broad research project in continuation of UNWTO's work in the area of longterm forecasting initiated in the 1990s. It has the following objectives:

- Assisting UNWTO Members in formulating policies and long-term strategic plans;
- Providing a global reference on tourism future development;
- Reinforcing UNWTO's role in agenda setting for tourism-related subjects;
- Constituting a reference for UNWTO strategic documents, programme of work and activities.

Tourism Towards 2030 enriches existing forecasts with an overview of the social, political, economic, environmental and technological factors, which shaped tourism in the past, and are expected to lead development and growth in the future.

You can consult Tourism Towards 2030 online in the UNWTO e-Library www.e-unwto.org (free access for UNWTO Members) or purchase a copy through the UNWTO Infoshop www.unwto.org/infoshop (50% discount for UNWTO Members).



Istanbul Declaration on City Tourism

The following declaration is derived from the preceding report and has been approved by the 21 participating cities and the city of Moscow. Its name comes from the Global Summit on City Tourism where it was presented (Istanbul, Turkey, 14-16 November 2012).

“Catalysing economic development and social progress”

The city is part of our culture and our history; it is the epicentre for many of our traditions. The city has been and will continue to be the primary hub for the transmission of ideas, information and knowledge. In an increasingly globalized world, cities are interconnected nodes. This is the reason behind their success in attracting talent, especially young people who are drawn to cities in order to realize their dreams.

Most of us live and work in cities and yet we visit other cities during our free time. As society is in constant change so are cities, trying to adapt and meet the needs of residents and visitors as well as making them an attractive destination for future visitors. This is a unique economic and social opportunity; it brings dynamism and vitality, growth and development, and becomes an important element in peoples' lives.

Tourism is a very important factor in all policies related to urban development, it is not just a strategy to provide a competitive product to meet visitors' expectations but a way to develop the city itself and provide more and better infrastructure and living conditions to residents.

Today, in the face of so many and such rapid changes—social, economic, technological and environmental—taking place before our eyes, we feel the need to gain a fundamental understanding of the evident complexity and uncertainty of the current context, which also applies to the tourism activity that takes place in cities. For this reason, we strongly advocate continued discussion in global tourism forums on the current situation for city destinations across the world in order to gain better knowledge of their problems and opportunities, to share the best proposals and experiences, to provide guidance and, ultimately, to improve our global responses.

Declaration

All participating cities in the “Cities 2012 Project” promoted by the UNWTO Affiliate Members Programme, gathered at the GLOBAL SUMMIT on CITY TOURISM: Catalysing economic development and social progress held in Istanbul, Turkey, on 14-16 November 2012 convened by the World Tourism Organization (UNWTO) in partnership with the Ministry of Culture and Tourism of Turkey, and the Union of Chambers and Commodity Exchanges of Turkey (TOBB);

Referring in particular to the following instruments:

- The “Global Report on City Tourism”, (Cities 2012 Project), published by the UNWTO with the participation of 21 tourism cities of all parts of the world
- The “Global Forecasts and Profiles of Market Segments, Tourism 2020 Vision”, published by the UNWTO
- The Report on “City Tourism and Culture, the European Experience”, a joint publication of UNWTO and of the Research Group of the European Travel Commission
- The International Conference on the Future of City Tourism in Europe, held in Coimbra, Portugal, in May 2005
- The International Conference on Metropolitan Tourism held in Shanghai, China, on November 2006
- The International Conference on Metropolitan Tourism held in Busan, Korea, in September 2007
- The Instruments and Recommendations of the United Nations relative to cities, in particular, those promulgated by UN HABITAT



Taking into consideration the proposals, recommendations and the support received from the tourism entities of the following cities:

- | | | | |
|----------------|-------------|------------------|-------------|
| ■ Athens | ■ Hong Kong | ■ Moscow | ■ Shanghai |
| ■ Barcelona | ■ Kazan | ■ New York | ■ Vienna |
| ■ Berlin | ■ Lisbon | ■ Paris | ■ Zaragoza |
| ■ Bogota | ■ London | ■ Québec | ■ São Paulo |
| ■ Buenos Aires | ■ Madrid | ■ Quito | |
| ■ Cape Town | ■ Melbourne | ■ Rio de Janeiro | |

- The UNWTO Global Code of Ethics for Tourism
- as well as other relevant Recommendations and Resolutions of the UNWTO on city tourism, and

Agreed that:

- Tourism is a key resource for cities and local residents.
- The future development of cities, with the opportunities and challenges that it will bring will demand policies that take into account cities' economic, social and environmental stability while at the same time offering the best experience for visitors.
- Tourism will continue to be a vital component of the global economy and in particular to cities, bringing substantial economic benefits and playing an important role in terms of income and maintenance of urban infrastructure and public services.
- Tourism provides employment for millions of people in the world's cities. Employees play an important role in the visitor experience and thus have the potential to provide differentiation from competitors.
- Tourism connects people and promotes intercultural understanding.
- Tourism needs the diverse and flexible products a city can offer and cities need tourism to achieve their social and economic objectives.
- Urban tourism can trigger a more competitive approach in promoting destinations.

Urban tourism can stimulate innovation

- Urban tourism has the potential to implement and project a consistent brand image for the benefit of all the services and activities offered by cities and therefore provide significant revenue and added value to their residents as well as to the tourism brand of their respective countries.

Given the above, action is required to:

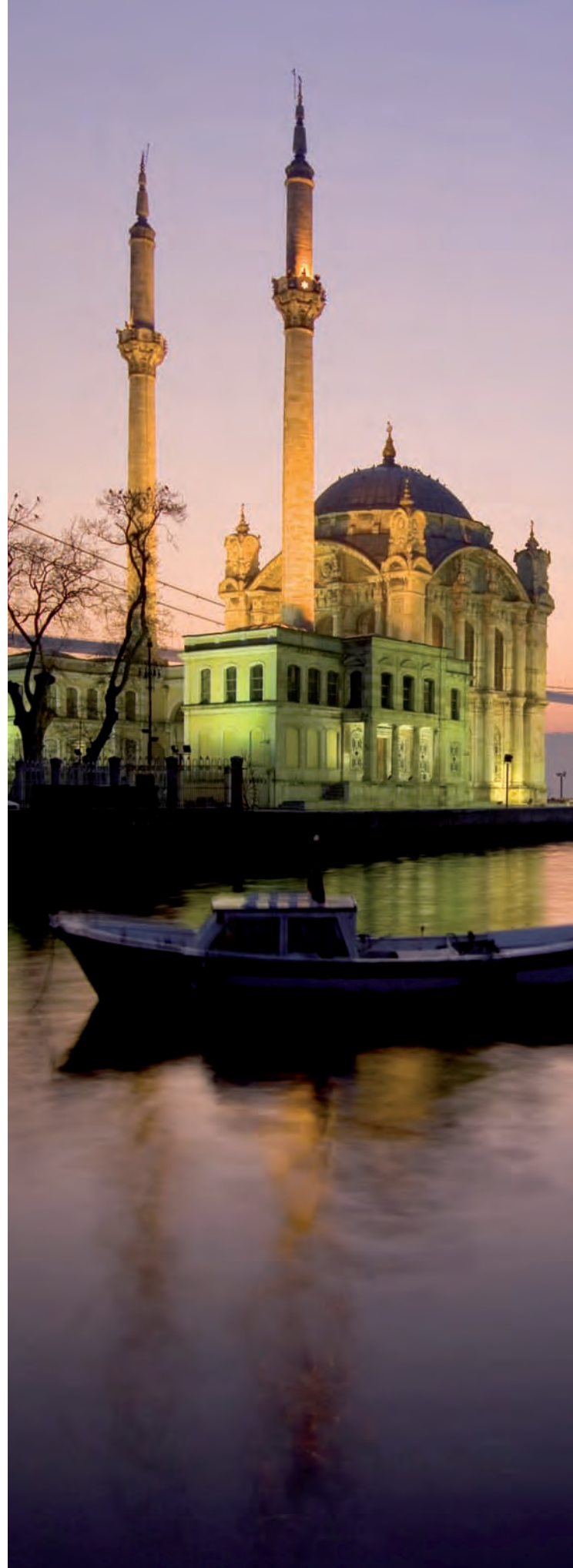
- Raise awareness of the economic and social impact of city tourism on national and local economies.
- Integrate urban tourism as a key pillar of governments' policies at all levels.
- Establish effective and renewed instruments for partnerships between all stakeholders involved with tourism in order to ensure the sharing of information, initiatives and knowledge to benefit the destination, tourists and local residents.
- Highlight the importance of human capital and consequently invest in professional training.
- Favour measures to encourage, foster and recognize sustainable local policies and initiatives that can serve as models and guides for all international tourism actors.
- Implement innovative strategies to provide the city with new and more specialized products with high added value, addressing niche markets and upgrading the quality of the visitor experience.
- Advance towards the concept of 'Smart Cities', urban destinations that prioritize strategies and actions that include sustainable policies and innovative technological developments as integral elements.

The Conference

- Sets out a range of specific actions to be taken by all stakeholders to establish a range of initiatives geared to increase sustainable investments and employment
- Invites cities, international organizations and all tourism sector stakeholders to implement these general guidelines with specific commitments and action plans
- Stresses the need to continue the discussion of this subject and focus on the specific and concrete challenges that cities in different regions around the world have to face

This Declaration, together with the Global Report on Urban Tourism and the results of the 'GLOBAL SUMMIT on CITY TOURISM: Catalysing economic development and social progress' will be referred to the governing organs of the UNWTO through its Secretary-General for information, and for the adoption, as the case may be, of any statements that may be made by their Members.

Istanbul, Turkey, on 15 November 2012





Annexes

Annex N° 1: Technical coordination of the participating cities on the Cities 2012 Project:

CITY	CONTACT PERSON	
Athens	George Angelis	Director of Athens Convention Bureau Athens Tourism & Economic Development Company
Barcelona	Pere Durán	General Director Turisme Barcelona
Berlin	Ralf Ostendorf	Market Management Director VisitBerlin
Bogota	Nohora Isabel Vargas	Director District Tourism Institute
Buenos Aires	Patricia Pécora	Executive Director Ente de Turismo de Buenos Aires
Cape Town	Mariëtte Du Toit-Helmbold	CEO Cape Town Tourism
Hong Kong	Mr. Paul Leung	Senior Manager Strategic Planning and Research Hong Kong Tourism Board
Kazan	Leisan Ganeeva	Head Expert of the Committee for Foreign Relations and Tourism
Lisbon	André Barata Moura	Visitors and Convention Bureau Observatório do Turismo de Lisboa Turismo de Lisboa
London	Paul Rickard	Travel and Tourism Analyst London & Partners
Madrid	Mar de Miguel	Managing Director Madrid Convention Bureau
Melbourne	Chris Buckingham	CEO Destination Melbourne
New York	Donna Keren	Senior Vice President Research and Analysis NYC & Company
Paris	Mr Paul Roll	General Manager Paris Convention and Visitors Bureau
Québec	Thomas Antil	Quebec Government
Quito	Luz Helena Coloma	Managing Director Quito Turismo
Rio de Janeiro	Marcia Paula Migliacci	International Promotion Manager Riotur
São Paulo	Marcelo Rehder	President Spturis
Shanghai	Mr. Patrick Chen Ping	Deputy Director of Marketing Department Shanghai Municipal Tourism Administration
Vienna	Katrin Heintschel	Tourism Research Strategic Destination Development Vienna Tourist Board
Zaragoza	Inmaculada Armisen	Managing Director Zaragoza Tourism

Annex N°2: Members of the Advisory Committee of the Cities 2012 Project

Associate Professor Brent W. Ritchie

Deputy Head, Research Director
SCHOOL OF TOURISM / THE UNIVERSITY OF
QUEENSLAND (AUSTRALIA)

Sr. D. Pere Durán

Managing Director
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John Koldowski

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Dott. Mara Manente

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Annex N° 3: Bibliography

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UNWTO Affiliate Members bring together over 400 companies, educational & research institutions, destinations and NGOs whose activities are related to tourism and which contribute to the UNWTO their knowledge and expertise to promote the development of tourism that's responsible, sustainable and accessible for everyone. Over 80 countries are represented among the Affiliate Members, the world's premier forum for exchanging tourism knowledge.



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