



UNWTO
World Tourism Organization

17th UNWTO/PATA FORUM ON TOURISM TRENDS AND OUTLOOK

Transforming tourism for people,
planet and prosperity
26–28 October 2023, Guilin, China

Executive Summary

17th UNWTO/PATA FORUM ON TOURISM TRENDS AND OUTLOOK

Transforming tourism for people, planet and prosperity
26–28 October 2023, Guilin, China

Executive Summary



Prepared in collaboration with:
School of Hotel and Tourism Management
The Hong Kong Polytechnic University



Copyright © 2023, World Tourism Organization (UNWTO)

**17th UNWTO/PATA Forum on Tourism Trends and Outlook –
Transforming Tourism for People, Planet and Prosperity
26–28 October 2023, Guilin, China
Executive Summary**

ISBN, printed version: 978-92-844-2507-5

ISBN, electronic version: 978-92-844-2508-2

DOI: [10.18111/9789284425082](https://doi.org/10.18111/9789284425082)

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

First published: 2023

All rights reserved.

World Tourism Organization (UNWTO)

C/ Poeta Joan Maragall, 42

28020 Madrid

Spain

Tel.: (+34) 915 67 81 00

E-mail: info@unwto.org

Website: www.unwto.org

Photo credits:

Coverphoto: © Vilchezj81 | Dreamstime.com

Page 6: © Steve Allen | Dreamstime.com

Page 11: © Lei Xu | Dreamstime.com

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the Secretariat of the World Tourism Organization (UNWTO) concerning the legal status of any country, territory, city or area, or of its authorities or concerning the delimitation of its frontiers or boundaries.

UNWTO does not guarantee the accuracy of the data included in this publication and accepts no responsibility for any consequence of their use. The mention of specific companies or products of manufacturers does not imply that they are endorsed or recommended by UNWTO in preference to others of a similar nature that are not mentioned.

The report/results do not constitute any form of advice, recommendation, representation or endorsement and are not intended to be relied on in making (or refraining from making) any specific investment or other decisions.

The opinions contained in this publication are exclusive from the authors and do not necessarily reflect the point of view of the World Tourism Organization (UNWTO).

Citation:

Ministry of Tourism and Creative Economy of Indonesia (2023), *17th UNWTO/PATA Forum on Tourism Trends and Outlook – Transforming Tourism for People, Planet and Prosperity; 26–28 October 2023, Guilin, China, Executive Summary*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284425082>.

All UNWTO publications are protected by copyright. Therefore, and unless otherwise specified, no part of a UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications.

Permission to photocopy UNWTO material in Spain must be obtained through:

Centro Español de Derechos Reprográficos (CEDRO)
Calle Alcalá, 21, 2º der.
28014 Madrid
Spain

Tel.: (+34) 913 08 63 30

Website: www.cedro.org

E-mail: cedro@cedro.org

For authorization of the reproduction of UNWTO works outside of Spain, please contact one of CEDRO's partner organizations, with which bilateral agreements are in place (see: www.cedro.org/english?lng=en).

For all remaining countries as well as for other permissions, requests should be addressed directly to the World Tourism Organization. For applications see: www.unwto.org/unwto-publications.

TABLE OF CONTENTS

Introduction	4
Technical sessions	5
Technical session 1:	5
Rethinking tourism in post-pandemic times – Understanding and adapting to new trends	5
Technical Session 2:	6
Exploring sustainable tourism development – Leveraging China’s tourism potential	6
Technical Session 3:	7
Digital frontiers – Leveraging technology for sustainable tourism	7
Technical Session 4:	7
Empowering people in tourism	7
Plenary sessions	8
Keynote session:	8
Changes in supply and demand development and innovation of Guilin tourism industry	8
Panel session 1:	9
How to work together to get prepared for a better future?	9
Panel Session 2:	10
Empowering local economies: Financial and digital literacy for sustainable tourism	10
Concluding keynote	11
Conclusion	12

INTRODUCTION

The 17th UNWTO/PATA Forum on Tourism Trends and Outlook was held in Guilin, China from 26–28 October 2023. This prestigious event was organized by the World Tourism Organization (UNWTO) and the Pacific Asia Travel Association (PATA) in collaboration with the Hong Kong Polytechnic University under the theme of “Transforming Tourism for People, Planet, and Prosperity”.

The forum served as a platform for policymakers, senior officials, researchers and industry representatives from the Asia and the Pacific region and the wider geography to come together and discuss global and regional tourism trends. The aim was to gain a comprehensive understanding of these trends and their potential impacts on the tourism industry. Participants had the opportunity to exchange information, analyse the current tourism situation, and chart a course of action for the future.

The 2023 forum attracted attendees from 20 countries, including officials from national tourism administrations, tourism authorities from UNWTO member states, representatives from the tourism industry, academia, research associates and consultants, the media, and local tourism authorities. The meeting had a total size of over 200 participants, excluding reporters.

The event featured several technical sessions and plenary panel discussions that covered a wide range of topics. The sessions delved into post-pandemic tourism trends, sustainable tourism development leveraging China’s tourism potential and other source markets, leveraging technology for sustainable tourism, and empowering people in tourism. Keynote speakers and experts shared their insights on various subjects, including understanding

changes in tourism, harnessing the power of data for sustainable tourism, and empowering local economies through financial and digital literacy.

Notable discussions took place on how tourism stakeholders can collaborate and prepare for a better future, building a sustainable, inclusive, and resilient tourism sector, and the role of collaboration and partnerships in achieving UNWTO’s and PATA’s objectives. The forum also highlighted successful cases of tourism initiatives and projects that have contributed to local economies and cultural preservation.

Key takeaways:

- Understanding and adapting to new trends is crucial for the future of tourism, with digitalization, innovation, talent and education, and sustainability being key factors.
- Leveraging technology, such as big data and open data, can drive smart and sustainable tourism while meeting changing consumer demands.
- Financial and digital literacy are essential for empowering local economies and SMEs in the tourism sector.
- Empowering people in tourism through strategies like tourism education, human resources empowerment, and collaboration and partnerships is vital for industry success.

TECHNICAL SESSIONS

The technical sessions focused on the future of tourism in a post-pandemic world, sustainable tourism development, leveraging technology for sustainable tourism, and empowering people in tourism.

Technical session 1: Rethinking tourism in post-pandemic times – Understanding and adapting to new trends

The first session of the Forum, moderated by Eunji Tae (Officer, Regional Department for Asia and the Pacific, UNWTO), commenced with a focus on the theme “Rethinking tourism in post-pandemic times – Understanding and adapting to new trends”. Michel Julian (Senior Programme Officer, Tourism Market Intelligence and Competitiveness Department, UNWTO) delivered the latest global trends and outlook. He underlined the sustained recovery experienced by international tourism (84% recovery in January to July 2024 compared to 2019 levels) and discussed the need to understand and adapt to a changing tourism landscape.

Haesook Ma (Deputy Director of Tourism Big Data Strategy Team, Korea Tourism Organization) highlighted how the Republic of Korea is using big data to meet changing consumer demand and achieve smart, sustainable tourism.

Oliver Ponti (Vice President Insights, ForwardKeys) emphasized the importance of understanding and adapting to new trends.

Key messages of technical session 1:

- Understanding and adapting to new trends is crucial in the post-pandemic tourism landscape.
- The future of tourism includes digitalization, innovation, talent and education, whole-of-government approaches, and sustainability.
- Utilizing big data can help meet changing consumer demands and achieve smart, sustainable tourism.
- China’s travel industry is showing significant recovery, indicating a positive trend in the broader tourism sector.



Technical Session 2: Exploring sustainable tourism development – Leveraging China’s tourism potential

The second session, moderated by tourism marketing expert Shanhua Xiong (Vice President of Beijing Minsheng Think Tank and Consulting Co. Ltd, and Director of Tourism and Culture Research Center) and featuring panelists from Airbnb, Odynovo Tours, Global Tourism Economy Forum and Inland Waterways International (IWI) was entitled “Exploring sustainable tourism development – Leveraging China’s tourism potential”. Rudy Van Der Ween (President, IWI) explored successful cases of tourism for the World Canal Culture, focussing on leveraging China’s tourism potential for sustainable development.

Key messages of technical session 2:

- The session highlighted successful cases of tourism for sustainable development, with a specific focus on leveraging China’s tourism potential.
- The importance of exploring and utilizing China’s tourism potential for sustainable development was emphasized, showcasing the opportunities it presents for the industry.

Technical Session 3: Digital frontiers – Leveraging technology for sustainable tourism

The third session delved into the digital frontiers of tourism moderated by Pavnesh Kumar (Director of Sustainability, PATA). Leo Liu (Vice President of Business Development, public sector) discussed harnessing the power of data to drive sustainable tourism through government policies and programmes. Anthony Hoglund (Vice President & General Counsel, Asia Pacific, Amadeus Asia, Ltd.) shared how Amadeus helps manage airport services to achieve sustainability. Samson Chan (Director, Business and Partnership of Vpon Big Data Group) spoke about balancing travel and urban development with open data, while Cathy Hsu (Chair Professor of Hospitality and Tourism Marketing, School of Hotel and Tourism Management, The Hong Kong Polytechnic University) introduced TOUROMETER, a tool to support the social sustainability of tourism.

Key messages of technical session 3:

- Harnessing the power of data is crucial for driving sustainable tourism, and government policies and programmes play a significant role in utilizing data effectively.
- Balancing travel and urban development can be achieved through the use of open data, ensuring sustainable growth.
- TOUROMETER, introduced by Cathy Hsu, is a tool that supports the social sustainability of tourism, emphasizing the importance of considering the social impacts of tourism activities.

Technical Session 4: Empowering people in tourism

The final session focussed on empowering people in tourism, moderated by Honggen Xiao (Professor, School of Hotel and Tourism Management, The Hong Kong Polytechnic University). Nicholas Thomas (Associate professor, School of Hotel and Tourism Management, The Hong Kong Polytechnic University), emphasized the value of employees as a resource in the tourism industry. Simon Tian (Chief Executive Officer, Menduner & Huomiaoer) shared the results from *China Hotel Human Resources Study 2023* and provided suggestions on how to retain and recognize employees. Changrong Ling (Professor, Tourism Management Department, School of Business, Guangxi University) discussed strategies for targeting tourism human resources empowerment in world-class tourism cities.

Key messages of technical session 4:

- Employees are a valuable resource in the tourism industry, and their value should be recognized and prioritized.
- The *China Hotel Human Resources Study 2023* provided insights into employee retention and recognition, offering suggestions for improving the management of human resources in the hotel industry.
- Strategies for tourism human resources empowerment in world-class tourism cities were discussed, highlighting the importance of targeted approaches to enhance the capabilities and skills of tourism professionals.
- Investing in and empowering people within the tourism sector is critical to ensure its long-term success and sustainability.

PLENARY SESSIONS

The keynote and panel sessions focussed on the future of the tourism industry, with an emphasis on innovation, sustainability, inclusivity, resilience and empowerment.

Keynote session: Changes in supply and demand development and innovation of Guilin tourism industry

In the keynote session, Jigang Bao (the 2023 UNWTO Ulysses Prize awardee and Professor in the School of Tourism Management, Sun Yat-sen University) discussed the changes in supply and demand development and innovation in the Guilin Tourism Industry.

Key messages of the keynote session:

- The tourism industry faces a two-fold challenge, with the expectation of an increase in the total number of tourists but a crisis of diminishing benefits and low industry efficiency.
- Key tasks include seizing the opportunity of increased tourist numbers, enhancing industry efficiency and competitiveness, and achieving sustainable development.
- Strategic measures outlined involve reducing underperforming attractions, developing high-quality tourism products, protecting and enhancing the Guilin tourism brand and improving urban tourism infrastructure.
- Guilin aims to become a world-class tourist destination by leveraging internationalization advantages, promoting community-based tourism in Yangshuo for rural revitalization, and establishing itself as a pioneer zone for big data-enabled tourism.

Panel session 1: How to work together to get prepared for a better future?

The first panel session revolved around working together to prepare for a better future. The panel was moderated by Michel Julian (UNWTO). Dr. Fency Sivadasan (Senior Manager-Research, Sarawak Tourism Board) presented the tourism trends and outlook of Sarawak state and the way forward. Akiko Hangiwara (Principal Country Specialist, Asian Development Bank) discussed building a sustainable, inclusive and resilient tourism sector. Lyublena Dimova (Senior Research Manager, European Travel Commission) navigated European tourism within a transforming world, while Kanan Aliyev (Officer, Tourism Market Intelligence and Competitiveness Department, UNWTO) emphasized the role of collaboration and partnerships in achieving UNWTO's objectives.

Key messages of panel session 1:

- The key strategies to move forward for Sarawak state include enhancing connectivity, digitalization, developing human capital, fostering responsible tourism, emphasizing public-private partnerships, and implementing an expansion strategy.
- The focus is on developing a comprehensive tourism strategy for 2030, promoting community-based tourism with nature-based solutions, leveraging cultural and ecological assets for regional tourism and Belt and Road Initiative integration, and drawing valuable lessons from Asian Development Bank (ADB) projects in the PRC to enhance sustainability, inclusiveness and resilience in other developing countries.
- Collaboration is crucial in overcoming tourism challenges, with a specific emphasis on data exchange, monitoring impacts and understanding changing travel behaviours.
- Partnerships play a key role in advancing the measurement of tourism's impacts, collaborating with various stakeholders, implementing initiatives for sustainable practices, and supporting climate action in tourism through collaborative efforts.

Panel Session 2: Empowering local economies: Financial and digital literacy for sustainable tourism

The second panel session focussed on empowering local economies through financial and digital literacy for sustainable tourism. Ida Ayu Danik Suardhani (BA Manager SUSTOUR project, Sustainable Tourism Destination Development-SUSTOUR) and Eunji Tae (Officer of Regional Department for Asia and the Pacific, UNWTO) both discussed the importance of financial and digital literacy in empowering local economies and SMEs for global impact. Pavnesh Kumar, PATA's Director of Sustainability, highlighted the concept of tourism destination resilience.

Key messages of panel session 2:

- The SUSTOUR support for Indonesian tourism focusses on enhancing finance literacy and digital tools for the community as part of the tourism sector.
- The financial resilience of the tourism community is anticipated to contribute to the sustainability of the tourism sector.
- Collaboration and commitment from all stakeholders are crucial for inclusive, resilient and sustainable tourism.
- The digital future of tourism prioritizes green tourism, digitalization, skills development, support for tourism micro-, small and medium-sized enterprises (MSMEs) and holistic destination management aligned with the Sustainable Development Goals (SDGs).
- PATA serves as a connector between government and industry, advocating for global issues with local relevance, providing insights and travel solutions, catalyzing partnerships, and promoting the 5 Ps: People, Planet, Prosperity, Partnership and Peace.

Concluding keynote

In the closing session, Haiyan Song (Chair Professor, School of Hotel and Tourism Management, The Hong Kong Polytechnic University) discussed the sustainable travel behaviour of Chinese tourists, emphasizing the importance of sustainability in the future of tourism.

Key messages of concluding keynote presentation:

- Destinations can promote carbon neutrality by investing in carbon-neutral projects and implementing policies like carbon subsidies or reduction taxes for establishments such as restaurants, hotels and scenic attractions.
- Utilizing the nudging effect, destinations can leverage social media platforms to disseminate climate change information, encouraging tourists to make sustainable travel choices.
- To meet the demand for travel carbon offset (TCO) products, tourism providers should offer TCO options that offer access to carbon emissions data, offsetting information and channels, with a focus on domestic destinations, renewable energy investments, non-airline providers and pre-departure payment options.
- TCO providers must also enhance trust by developing reliable and transparent TCO products with green practices.



CONCLUSION

In conclusion, the 17th UNWTO/PATA Forum on Tourism Trends and Outlook was a significant event that brought together key stakeholders and experts in the tourism industry. The forum provided a platform for knowledge exchange, networking and collaboration, with a focus on transforming tourism for the benefit of people, the planet, and prosperity.

Beka Jakeli, Director of External Relations, UNWTO, emphasized the need of academia and the fact that its role in the tourism sector is still not properly recognized and realized. He addressed the importance of shaping strong public-private and academia partnerships (PPAP) crucial to ensuring effective coordination between all actors for the sector's long-term sustainability and resilience.

Peter Semone, Chairman, PATA, echoed these sentiments, stressing the importance of inclusivity, sustainability and innovation in the tourism industry. He commended the forum for its role in facilitating discussions on these critical issues and fostering a shared vision for the future of tourism.

Kaye Chon, Dean and Chair Professor, School of Hotel and Tourism Management, The Hong Kong Polytechnic University, praised the forum for its focus on empowering people in tourism. He underscored the value of employees as a resource in the tourism industry and the need for strategies targeting tourism education and human resources empowerment.

Finally, Yi Zheng, Deputy Director, Guangxi Zhuang Autonomous Region's Department of Culture and Tourism, expressed his appreciation for the forum's emphasis on sustainable tourism development. He highlighted the successful cases of tourism initiatives and projects that have contributed to local economies and cultural preservation.

The 17th UNWTO/PATA Forum on Tourism Trends and Outlook served as a valuable platform for knowledge exchange, networking and collaboration among tourism professionals. It played a crucial role in shaping the future of the tourism industry, emphasizing the importance of sustainability, inclusivity and innovation. By bringing together key stakeholders and experts, the forum contributed to the ongoing efforts to transform tourism into a force for positive change, benefiting both communities and the environment. The insights and outcomes of this forum will guide policymakers, industry leaders and researchers in making informed decisions and implementing strategies that ensure the sustainable and responsible development of tourism in the years to come.

In closing, the 17th UNWTO/PATA Forum on Tourism Trends and Outlook was a resounding success, providing valuable insights and guidance for the sustainable and responsible development of tourism in the years to come. The forum's outcomes will undoubtedly serve as a roadmap for policymakers, industry leaders and researchers in their ongoing efforts to transform the tourism industry.

Key recommendations:

- Working together is key in the post-pandemic era to adapt to changes, rethink tourism and get prepared to effectively face challenges ahead.
- Data and market intelligence become increasingly critical to understand trends, attract new segments and markets, make data-driven decisions and achieve a smarter tourism.
- Adjusting sustainable tourism policies to current challenges and the need of effective coordination. It is suggested that the private sector considers regenerative tourism as a factor of creating and offering products and services so that customers are given the greater opportunity to be involved in the environmental protection activities. At the same time, the industry shall rapidly develop more innovative and digitized services.
- Modernizing marketing and promotional activities, as well as developing positioning and repositioning strategies. The destinations need to rethink the way they operate. Generic marketing shall be replaced with concrete market and product development approaches based on targeted consumer segments.
- Boosting the sector by introducing further stimulating policies and incentive packages to the private sector.
- Education, training and human capital development shall be adapted based on labour market needs.
- The shift to a new understanding of partnerships in a wider scope. Considering the utmost need of the effective cooperation and coordination, the proposal was made to develop a new concept of public-private and academia partnerships (PPAP) instead of only speaking on the public-private partnerships (PPP).

The **World Tourism Organization (UNWTO)**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 160 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.



www.unwto.org

