

UN Tourism Affiliate Members Corner: Cross-Sector Value in Tourism

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The UN Tourism Affiliate Members Corner: Cross-Sector Value in Tourism was held on 23 January during FITUR 2026, offering a dedicated platform to explore how tourism increasingly intersects with a broad range of economic, social, and cultural sectors. The session examined how cross-industry integration contributes to destination growth, long-term competitiveness, and sector-wide resilience.

Through contributions from specialized Affiliate Members, the discussion addressed the role of culture and museums as living assets, the influence of music and festivals on travel motivation, and the rising importance of health, wellness, and thermal tourism. Participants also explored the synergy between retail and urban identity, the expanding economic potential of sports tourism, and the essential connection between hospitality, infrastructure readiness, and visitor experience. Insights were also shared on how tourism-related real estate is evolving into city-making platforms and on emerging trends in travel insurance that support a safer and more resilient sector.

The session highlighted concrete examples, case studies, and best practices demonstrating how collaborative approaches with other industries generate value, promote diversification, and strengthen sustainable destination development. Overall, the discussions aimed to inspire more coordinated planning, inform effective marketing strategies, and enhance competitiveness in the rapidly evolving tourism landscape of 2026 and beyond.

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Museums as living cultural heritage for tourism and MICE

Motivations to visit a Destination:
- Curiosity for different cultures
- Openness to adventures

Case Study: Yerebatan (Basilica) Cistern Museum visitation has increased significantly:

- Heritage + economic and social value
- Inclusiveness and strategic tourism assets
- Living cultural platform
- Public engagement and experience
- Global culture visibility

Pre-2020:
~1.5+
million visitors annually

Post-2020:
~2.1+
million visitors annually

Shifts from monument-focused tourism to curated cultural experiences (2022) Contemporary lighting, circulation, and exhibition design increased suitability for:
- Cultural programming
- Private visits
- International visibility

Case Study: Hünkar (Sultan's) Pavilion
- Historic ceremonial and reception space within The New Mosque (Valide Sultan Mosque)
- Restoration and reactivation supported by Istanbul Chamber of Commerce
- Repositioned as: a venue for cultural diplomacy and art exhibitions; a setting for high-level cultural programs linked to major events and congresses



Mr. Cemil Hakan Kiliç
General Manager
Istanbul Convention & Visitors Bureau

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The soundtrack to travel

Music & Travel: the perfect duet

92% when traveling

35% when planning or researching their travel

37% when booking their trips

84% when on a road trip

75% on plains or trains

Music inspires travel

- 55% planned to travel for music in 2025
- 75% of Gen Z, 65% of Millennials

Record-Breaking Growth

- The global music tourism market is projected to reach $13.8B by 2032
- 66% of U.S. travelers say festivals and concerts are their main reason for pop-culture trips

Fans will travel far for music

34% of concert-goers are willing to travel over **100 miles** **for a show**

13% of Gen Z concert-goers would travel over **500 miles** **to see their favorite artists live**

Exploring New Places Through Music

- Music is seen as a way to discover new destinations via live concerts
- Live concert bookings grew by 69% from 2023 to 2024

Festivals: The Fastest-Growing Segment

- 13% of global travelers plan trips primarily to attend music festivals
- Traffic to festival pages on Tripadvisor increased 22%, growing 184% faster than other categories

Travel Spikes During Festivals

- Coachella Stagecoach: Stagecoach 2024 saw travel demand 90% above the yearly average
- EDC: Las Vegas festival weekends have 89% increase in travelers
- Lollapalooza: Chicago opening day third busiest travel day (225% above average)
- Ultra music festival: Miami opening night 110% higher travel demand

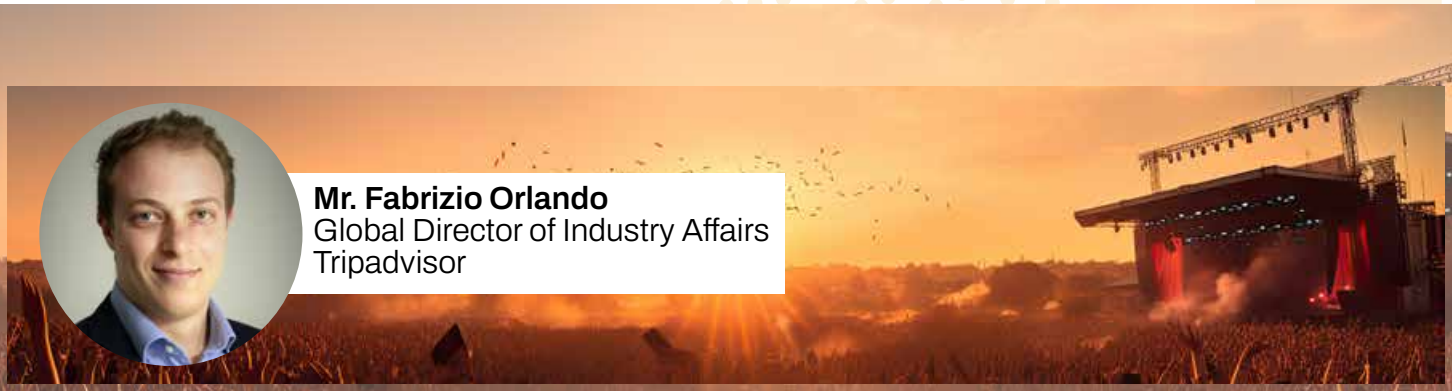
In-destination searches have grown across

43% Karaoke bar

34% Live music

34% Jazz bars

77% Piano bars



Mr. Fabrizio Orlando
Global Director of Industry Affairs
Tripadvisor

EUROPEAN HISTORIC THERMAL TOWNS

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Thermal destinations Symbiosis of Health & Cultural Tourism

Touristic Product & Thermal Destination

Historically, thermal destinations have been places of health, wellbeing, and medical expertise, equipped with infrastructure designed to heal, host, and welcome visitors for centuries.
Current challenge: Transforming the traditional image of "curing the old and sick" into destinations of wellbeing, prevention, and holistic health, where prevention itself becomes a natural resource.

Cultural Tourism

Thermal destinations have historically attracted leading figures of culture and society and continue to offer rich and diverse cultural experiences, including:

- Rich heritage and culture
- Powerful storytelling linked to historic figures and key moments in European history
- Tangible and intangible heritage
- Authentic local experiences: traditions, events, arts, and gastronomy

Examples of Culture & Heritage

- Festivals & Events
- Arts & Museums
- Sightseeing & Tours
- Springs & Sources
- Spa Architecture
- Villas & Grand Buildings
- Parks & Gardens

Examples of Health & Wellbeing

Rooted in nature and tradition, thermal destinations provide a comprehensive health and wellbeing offer based on:

- Healing water
- Landscape and Natural environment
- Spa culture
- Prevention
- Cure
- Rehabilitation



Ms. Emma Gonzalez
Representative
European Historic Thermal Towns Association (EHTTA)

Tourism, shopping and retail: One shared ecosystem

Tourism is no longer experienced through isolated sectors, but through emotions, places, and meaningful moments. In Madrid, shopping is a strategic pillar of the city's tourism model and a key element in shaping the visitor experience.

According to data from Madrid Destino Intelligence Center and Global Blue:

- It is the **second-largest category of tourist expenditure**, after gastronomy.
- It is the **third motivation for visiting the city**, following heritage, culture, and gastronomy.
- It strengthens Madrid's positioning as a **premium yet accessible destination**, attracting long-haul and high-value markets.
- Through **Madrid Unique Destination,** retail is integrated into major events and tourism initiatives via public-private collaboration.
- Madrid leads tax-free shopping growth with **13.9%.**

13,9%	9,3%	9,1%
Madrid	Paris	Milan

Madrid demonstrates how retail can drive identity, experience, and sustainable growth.



Ms. Laura Navarrete
Marketing Director
Madrid Destino Cultura, Turismo y Negocio

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Tourism and sport: A strategic relationship

Economic Impact & Value Creation Sports tourism represents ~10% of global tourism

USD 600–620 billion
market is valued in 2023-2024

USD 1.7–2.4 trillion
Projected growth by 2030–2032

USD 1,500+ per trip
Average spending per sports tourist

Beyond the Event: Destination-Wide Impact

- Economic benefits extend beyond the sporting event
- Activation of local tourism value chains
- Sport as a powerful destination branding tool
- Strengthening overall destination competitiveness
- Creation of long-term economic and social value

Long-Term Destination Value & Branding

- Sustainable investment and attraction of specialized domestic and international markets
- Job creation and income generation and increased local consumption
- Direct economic impact in hotels, accomodation, transport, events and services
- Indirect economic impact in supply chains and local businesses
- Key actors as sports events, athletes and the spectators

Nayarit: Sport & Tourism as a Development Strategy

- Strong interdependence between sport and tourism
- Strategic use of natural assets
- Integration of activities such as surfing, endurance races and adventure sports
- Diversification beyond sun & beach tourism
- Strategic Branding: High-profile partnerships with teams like the Dallas Cowboys and Los Angeles Lakers

Designing Tourism Products & Experiences

- Development of active and experiential tourism combining sport, nature, culture, gastronomy
- Sporting events as tourism anchors
- Creation of specialized tourism products
- Events as travel motivators that encourage deeper destination exploration

Intersectoral Collaboration & Shared Value

Coordination between: tourism authorities, sports organizations, private sector, local communities, promotion of sustainable events, generation of local employment, strengthening of destination identity, and creation of shared economic and social value



Mr. Juan Enrique Suarez del Real Tostado
Secretary of Tourism of the State of Nayarit
Fideicomiso de Promocion Turistica del Estado de Nayarit

Cross Sector Value Creation: Tourism & Hospitality Interdependence

Tourism and hospitality are inseparable; tourism attracts interest, but hospitality creates the capacity to host.

Tourism Attractions → **Visitor Demand** → **Hospitality System** → **Destination Value**

Hospitality Capacity and Visitor Growth

- Expansion in hospitality followed government improvements in roads, airports, and utilities.
- New connectivity projects—like the ferry, "Fly-Over" bridge, and local market developments—have supported growth.
- International arrivals rose from 736,755 in 2024 to 910,682 in 2025, a 24% increase.

Economic Value and Experience-Led Models

- The multiplier effect: Hospitality is the island's largest employer, generating value for suppliers, fishers, guides, and services in Nungwi, Kendwa, Paje, and Jambiani.
- Cultural Integration: Modern development integrates Swahili architecture and cuisine, encouraging long stays. Improved connectivity diversifies tourism beyond traditional hotspots, reducing pressure on Stone Town.

Collaboration and Sustainability

Sustainability in Zanzibar is an outcome of coordination, not just isolated projects:

- Sourcing & Training: Operators collaborate with local communities for food sourcing and engage training institutions to raise service standards.
- The Z-Summit: A best-practice platform convened by the Zanzibar Association of Tourism Investors (ZATI). It aligns investors, government, and financiers to ensure tourism growth matches hospitality readiness.

Key Takeaways

- Tourism demand alone does not create a destination
- Hospitality transforms that demand into employment and capacity
- Improved infrastructure Improved infrastracture enables sustainable capacity expansion and resilience



Mr. Suleiman Mohammed
Chairman
Zanzibar Association of Tourism Investors

Project Maraey: Mixed-Use Development

The Triple Dimension of Development

The connection between real estate and tourism is built upon three essential dimensions that define **long-term success and integration:**

- Environmental Concerns
- Inclusive Communities
- Economic Impact

Integrated Urban Ecosystems

This model serves as a powerful driver for structural and long-term value creation for destinations:

- Spaces designed for living, working, studying, and visiting simultaneously
- Ensuring year-round activity to move beyond the limitations of seasonal tourism
- Generate a territorial impact that extends beyond the project's boundaries, attracting institutional capital and long-term financing

Project Maraey: Integrated Tourism & Urban Development

- Iconic mixed-use project near Rio de Janeiro, acquired in 2008, spanning 844 hectares with 8.5 km of **beachfront**
- Designed to connect tourism, residential living, education, sports, and business, driving year-round activity and reducing seasonality
- Built around three core pillars: environmental sustainability, social inclusion, and economic impact
- Strong environmental commitment through protection, preservation, and regeneration, including the creation of the **5th private natural reserve in Brazil**
- Regeneration efforts delivering a net-positive environmental impact
- Community-centered approach granting property titles and equal access to infrastructure and services
- Phase 1 development includes **3 hotels, branded residences, a university, sports and equestrian facilities, an environmental research center, and a corporate hub**
- Future phases will deliver new residential units, a shopping center, a school, and a hospital
- Mixed-use model enhances economic transformation, improves access to financing, and reduces project risk through diversified assets

270	200	8,000	700
hectares of new green areas	local fishing families integrated	residential units	university students



Mr. Emilio Izquierdo Merlo
CEO
Maraey

Allianz | Allianz Partners

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Consumer & Traveler Priorities

Consumer & Traveler Priorities

- Cost remains the top concern when planning trips
- Rising worries around geopolitical instability and overcrowded destinations
- Ongoing concerns about trip disruptions, delays, illness, accidents, and cancellations, reinforcing the need for ‘ravel protection

Travel Spending & Booking Behavior

- Travel is the only discretionary expense still growing, with a positive outlook toward 2026
- Travelers are increasingly booking further in advance to manage costs
- Strong growth in early bookings (e.g. Black Friday sales), increasing demand for cancellation coverage

Global Travel & Industry Trends

- Outbound travel growth slowed in 2025, but confidence is rebounding for 2026
- China leads global recovery, with outbound travel growing faster than any other market
- Travel to the U.S. is declining, while most other destinations continue to grow
- Air capacity is recovering rapidly, supporting future tourism growth

Travel Insurance Trends

- Travel insurance consideration is at an all-time high in 2025
- Growing attachment rates across airlines, OTAs, and travel agencies
- Rising demand confirms travel insurance as a core travel essential, not an add-on

Digital & Proactive Solutions

- Travelers increasingly expect digital, proactive support alongside human assistance for emergencies
- Platforms like Allyz enable:
  - Policy management and mobile claims
  - Proactive safety alerts
  - Compensation for delays (e.g. airport spending vouchers, lounge access)
  - Telemedicine and remote prescriptions at destinations

Distribution & New Revenue Models

- Travel insurance plays a key role in ancillary revenue growth
- Expansion beyond travel companies into banks and payment providers
- More flexible offers: micro-segmented coverage, single policies, and tailored upsells



Mr. Fernando Barcenilla
Head of Travel Insurance
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