

Think Tank Liguria 2030

Santa Margherita Ligure, La Cervara

Martedì, 6 luglio 2021

Quinta edizione

PRESENTAZIONE DI CARLOS VOGELER





The European House

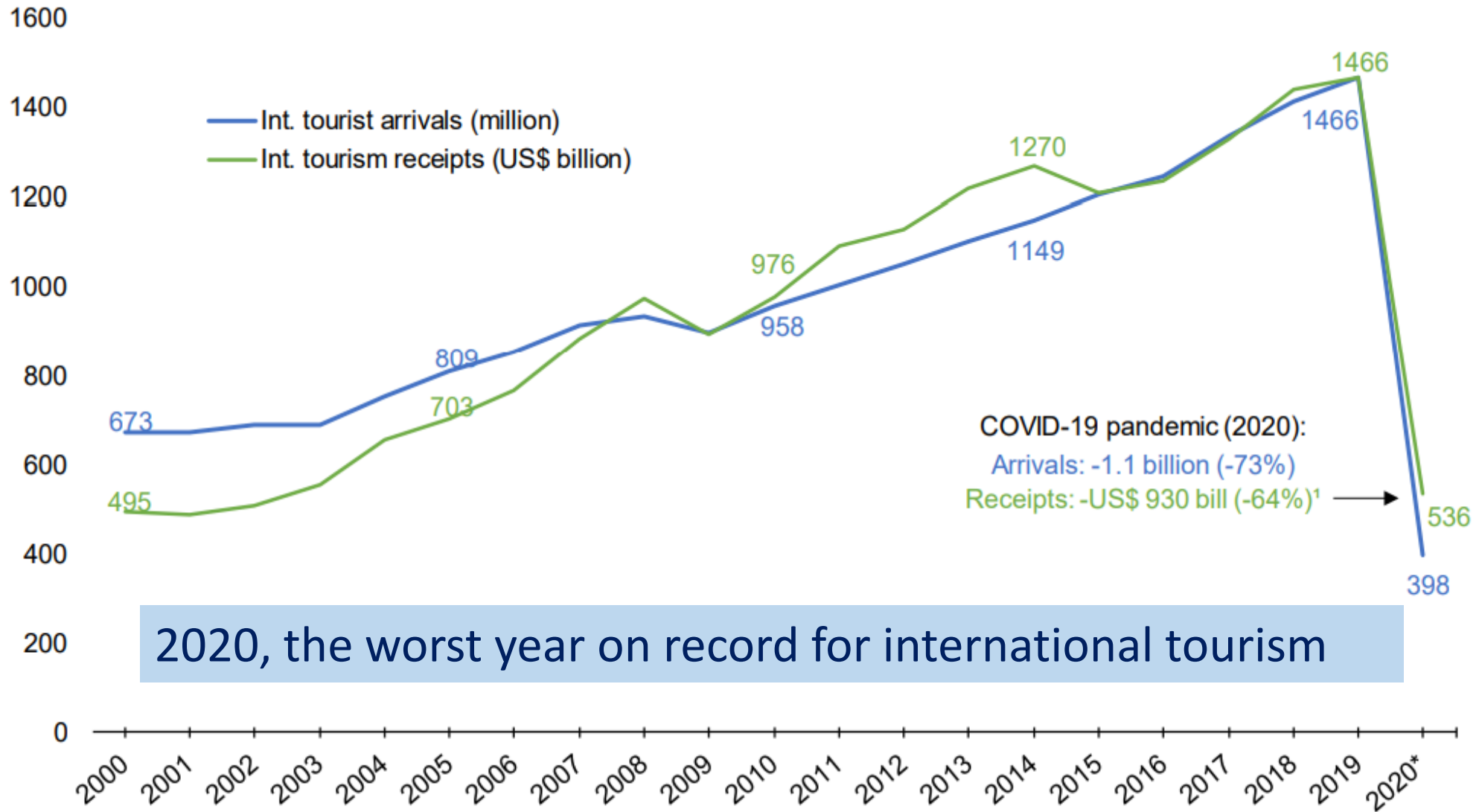
Ambrosetti

FIFTH LIGURIA 2030 THINK TANK FORUM

**Sustainable development of Tourism:
Challenges and opportunities ahead**

Carlos Vogeler

International tourist arrivals and tourism receipts, 2000-2020



2020, the worst year on record for international tourism

Source: UNWTO

* Provisional data.

¹ Real percentage change (local currencies, constant prices)

(Data as of May 2021)

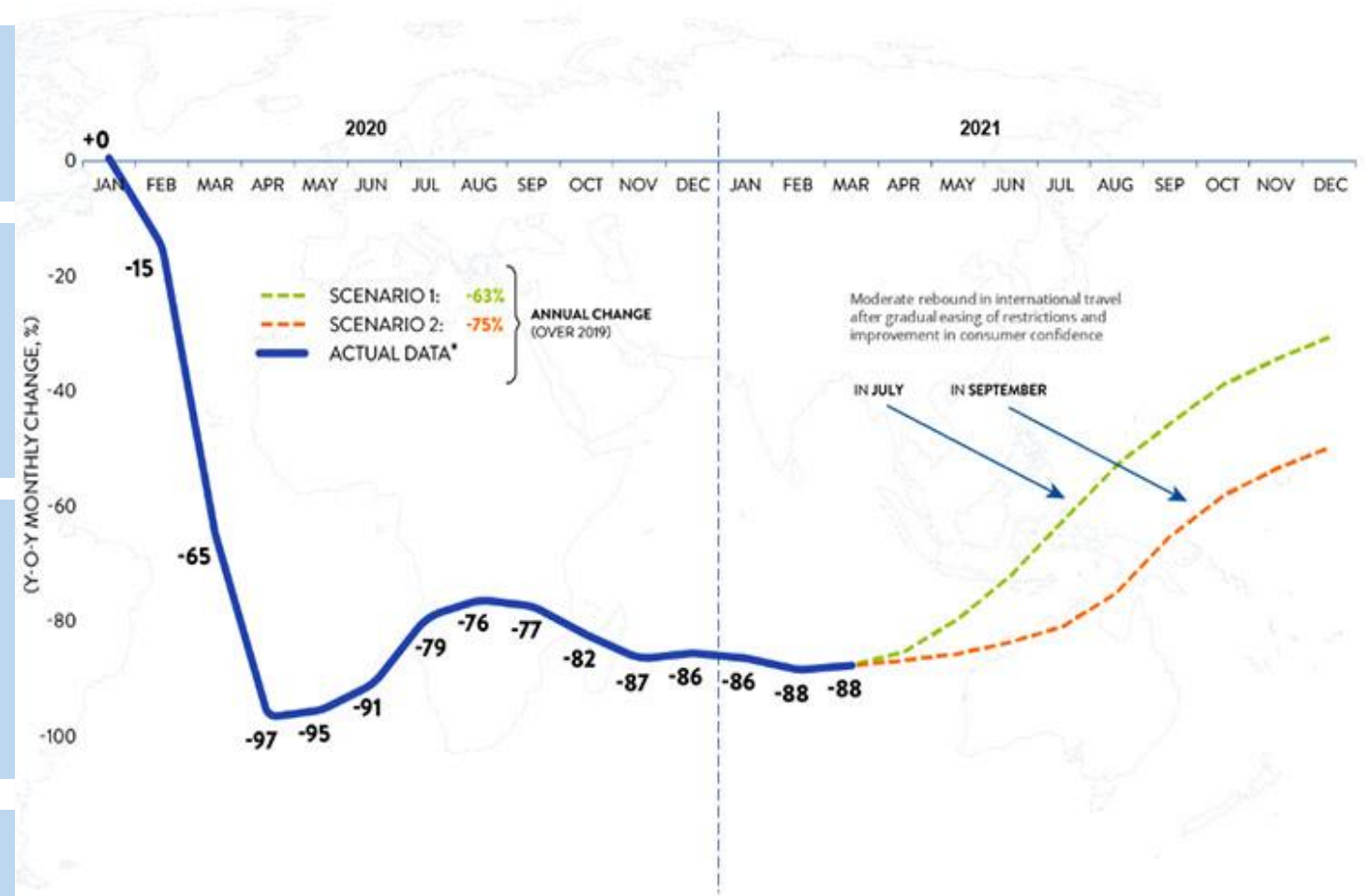
International Tourism scenarios for 2021

- January - March 2021 dropped by 83% vs 2020

- Travel restrictions high
- Consumer confidence slowly rising in May-August 2021

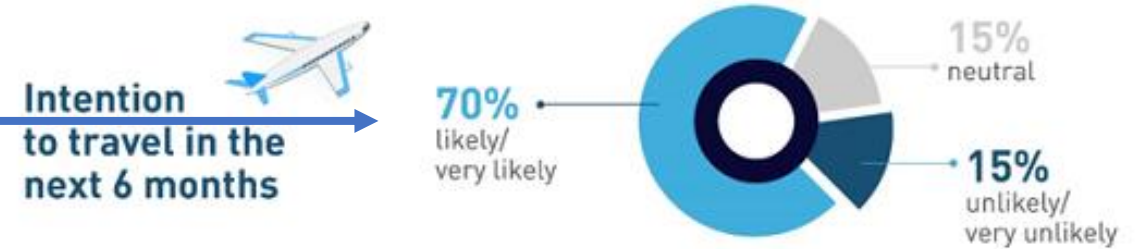
- Hopes for recovery:
 - pace of the vaccination
 - Policies to restart tourism safely (EU Digital Green Certificate)

- Uncertainty remains:
 - new variants of the pandemic
 - Travel restrictions still in place
 - Uneven rollout of vaccines



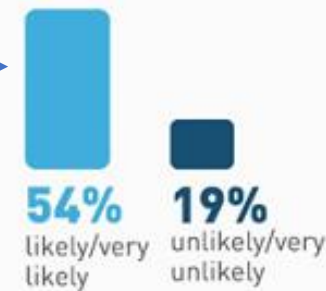
EUROPEANS' TRAVEL SENTIMENT SKYROCKETS IN VIEW OF VACCINE ROLLOUTS & THE INTRODUCTION OF THE EU DIGITAL COVID CERTIFICATE

70 % Europeans likely to travel in the next 6 months



54 % intend to travel after COVID – 19 vaccination

Travel intention after COVID-19 vaccination

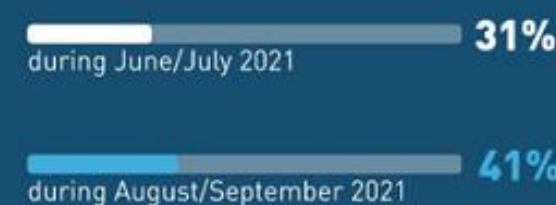


Sentiment towards EU Digital Covid Certificate

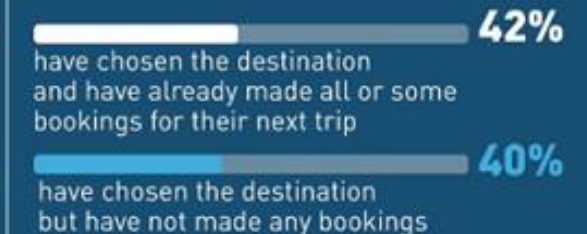


57 % positive sentiment towards EU Digital Covid certificate

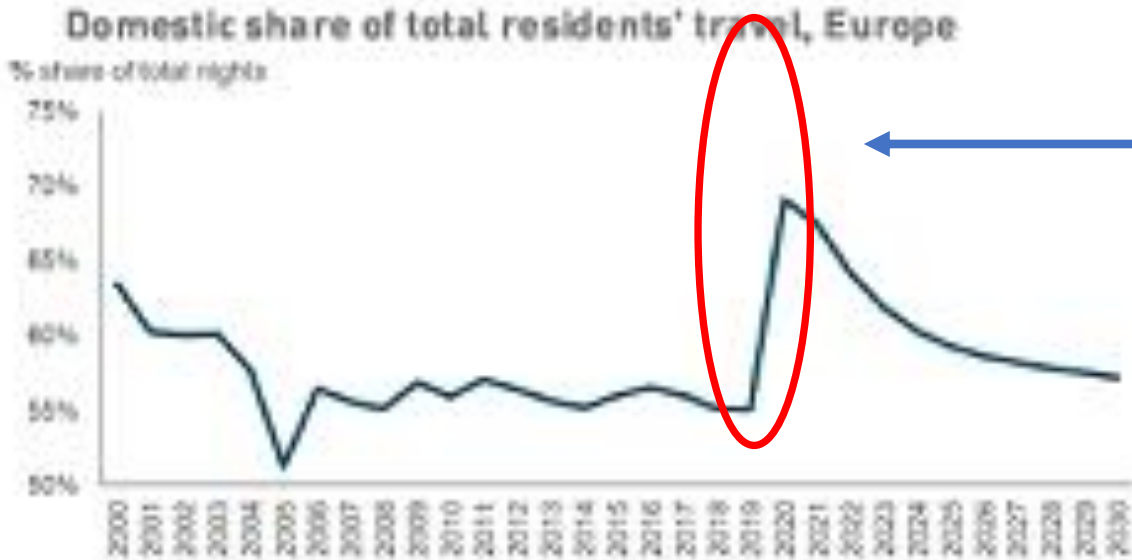
When will Europeans travel next?



Travellers' booking status



Domestic Travel opportunities



- Summer 2019 : 55 % of total travel
- Summer 2020 : 69 % of total travel

2021: Domestic travel will continue to increase, but not enough to compensate the decline of international travel

Feb '21 survey

PREFERRED COUNTRIES FOR THE NEXT EUROPEAN TRIP

Italy narrows the gap with Spain while top 5 destinations hold their positions

TOP 10 COUNTRIES

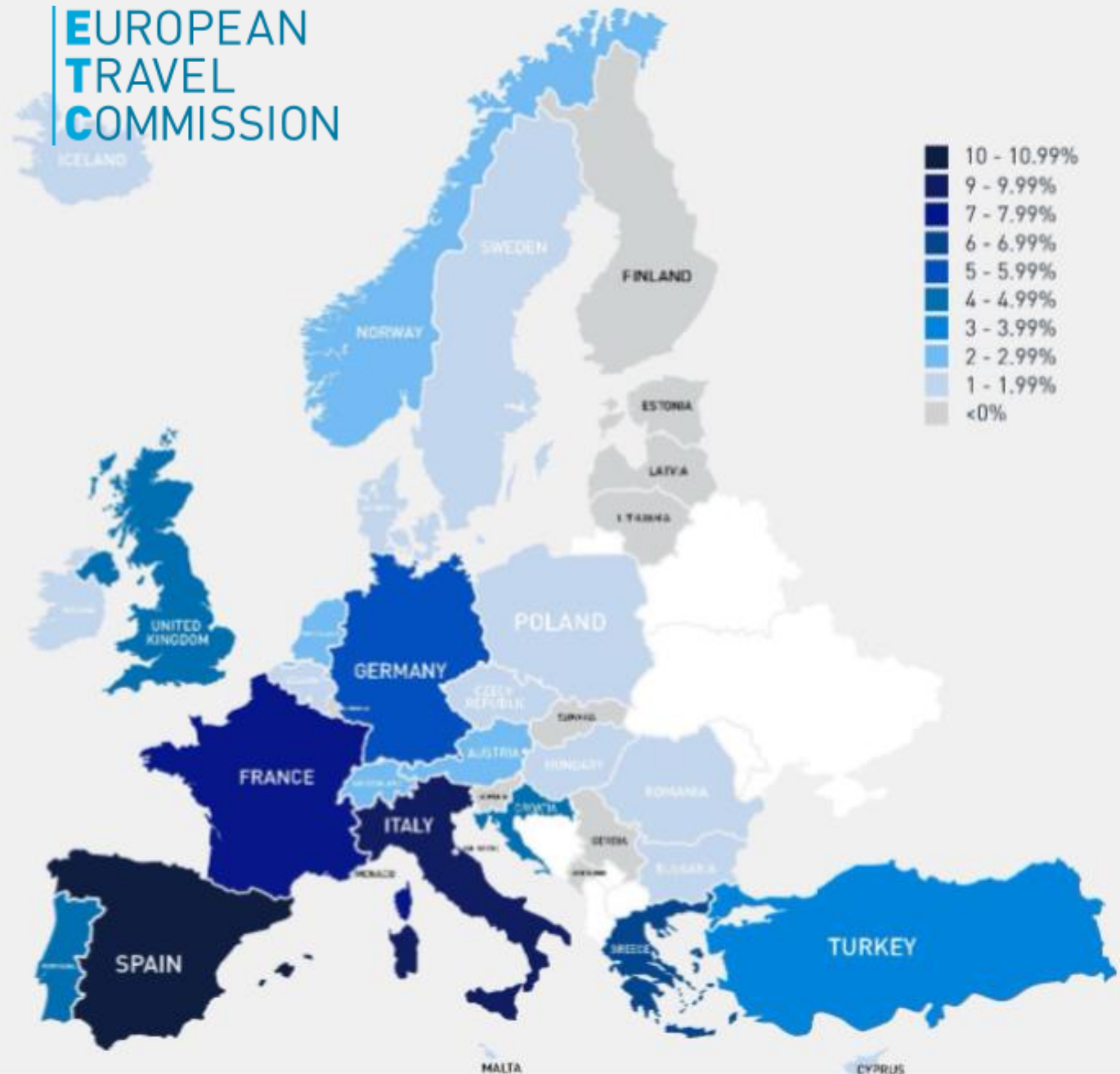
Spain	10.4%
Italy	9.0%
France	7.0%
Greece	6.2%
Germany	5.2%
Portugal	4.7%
United Kingdom	4.2%
Croatia	4.0%
Turkey	3.5%
Netherlands	2.9%

Please use this map as a reference only

* No significant changes between waves were recorded for this question

No. of respondents: 4,122

EUROPEAN
TRAVEL
COMMISSION

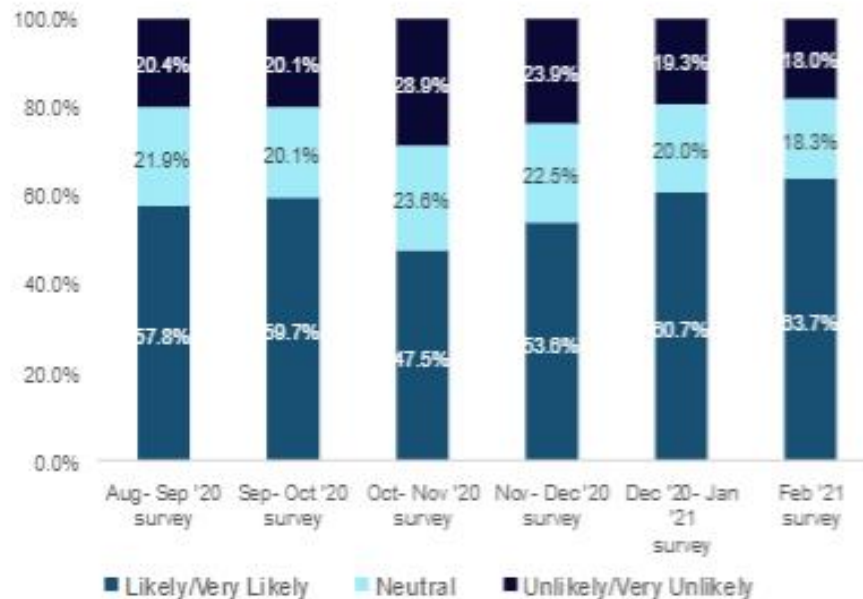


ITALY

2 in 5 Italians plan to take a trip around mid to late summer, favouring domestic destinations



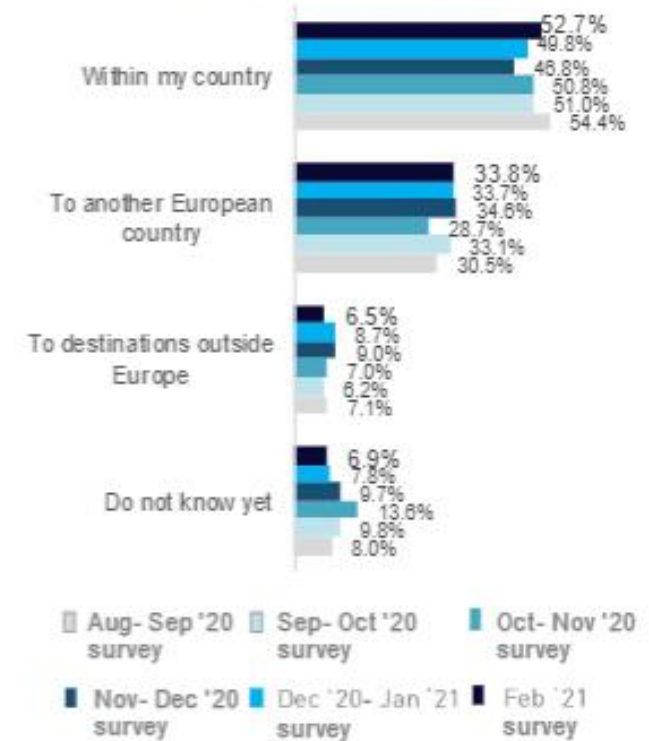
Willingness to travel in the next 6 months



When will Italians travel?



Where will Italians travel within the next 6 months?



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q9. When are you most likely to go on your next trip either in your country or within Europe?

Q10. Where do you plan to travel in the next 6 months?

Tourism Post Covid - 19

- **More technology applied to tourism:** voice search, robots, contactless payments, virtual/augmented reality, internet of things (IoT), big data, etc.



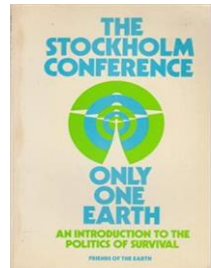
- **More demand for personalized products with singular experiences**



- **More concern about personal wellbeing:** air quality and man-made environmental impacts.
- **A sustainable approach to tourism development is a great opportunity**
- **Consumers are increasingly looking for tourism destinations committed with sustainability**



EVOLUTION OF THE SUSTAINABILITY CONCEPT

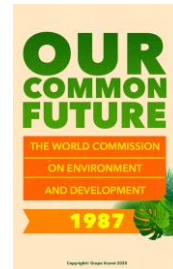


Stocholm Conference
Creation of UNEP

1972

1987

Brundtland Report



SDGs
Sustainable Development Goals
Agenda 2030



Rio+20
"The future we want"

Rio Earth Summit
• UN Conference Agenda 21



1992

2002

World Summit on Sustainable Development
Johannesburg



2000

2000 -2015 MDGs
UN Millenium Development Goals



2012

2014

UN Resolution on Sustainable Tourism
Sustainable tourism for poverty eradication and environment protection



2017

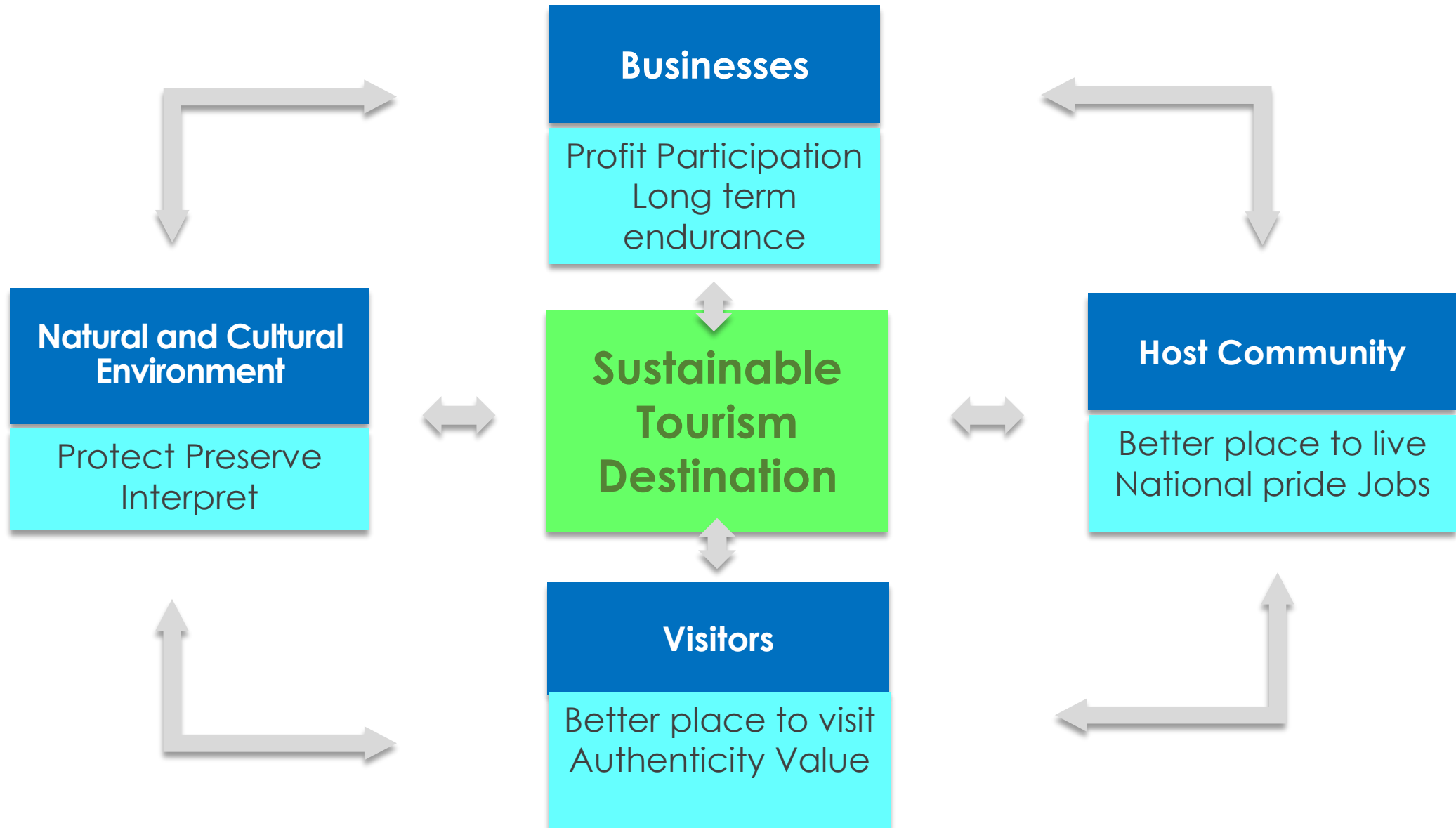
2017 Año Internacional del Turismo Sostenible para el Desarrollo



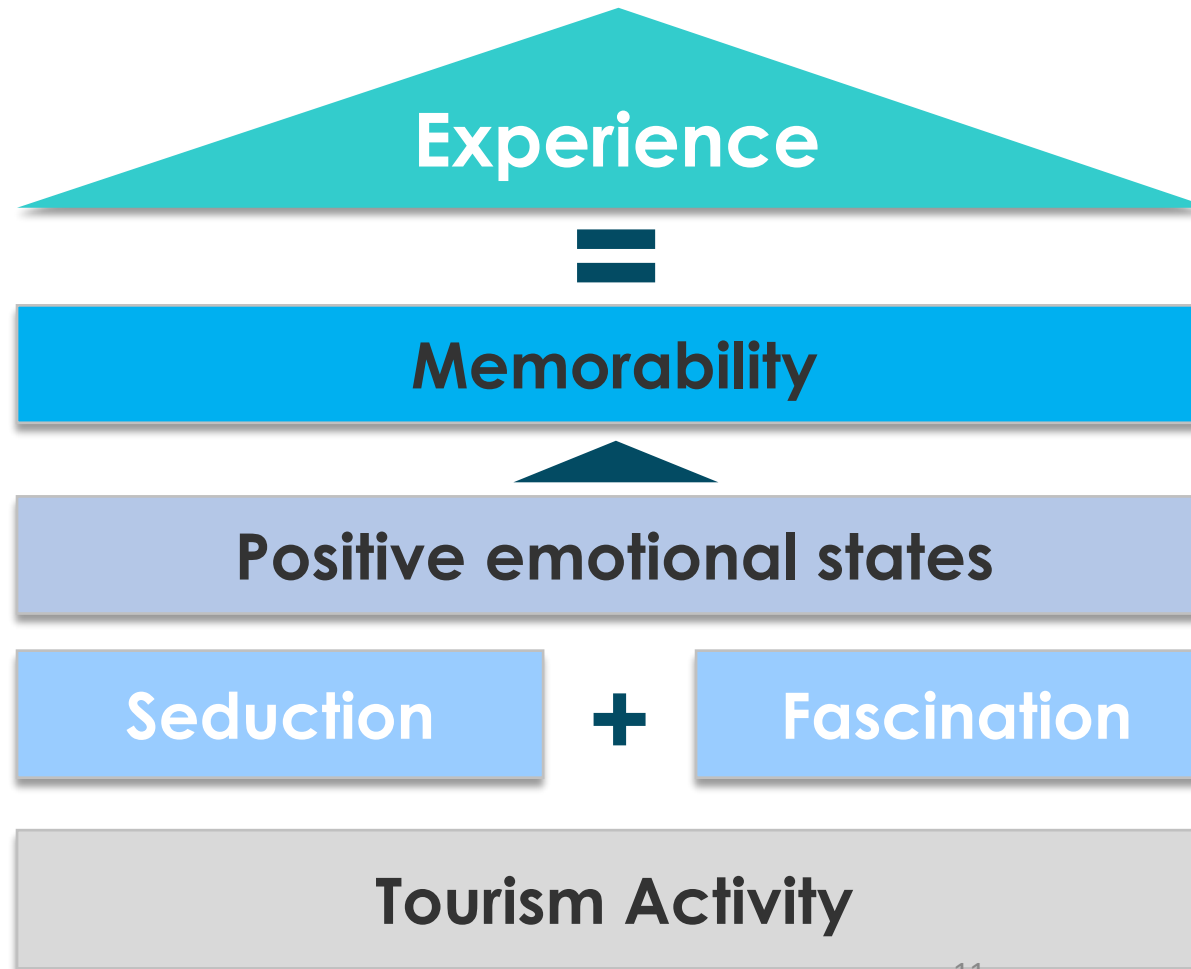
2015

Paris agreement





Tourism experience vs Tourism activity

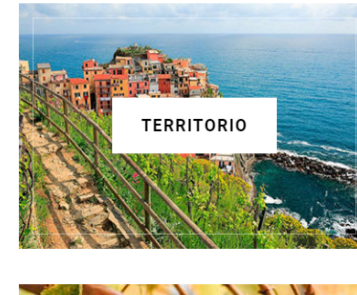


IN PRIMO PIANO ▾ TENDENZE

Enoturismo: uno dei segmenti turistici più promettenti

di Stefano Pezzini | 20 Giugno 2019

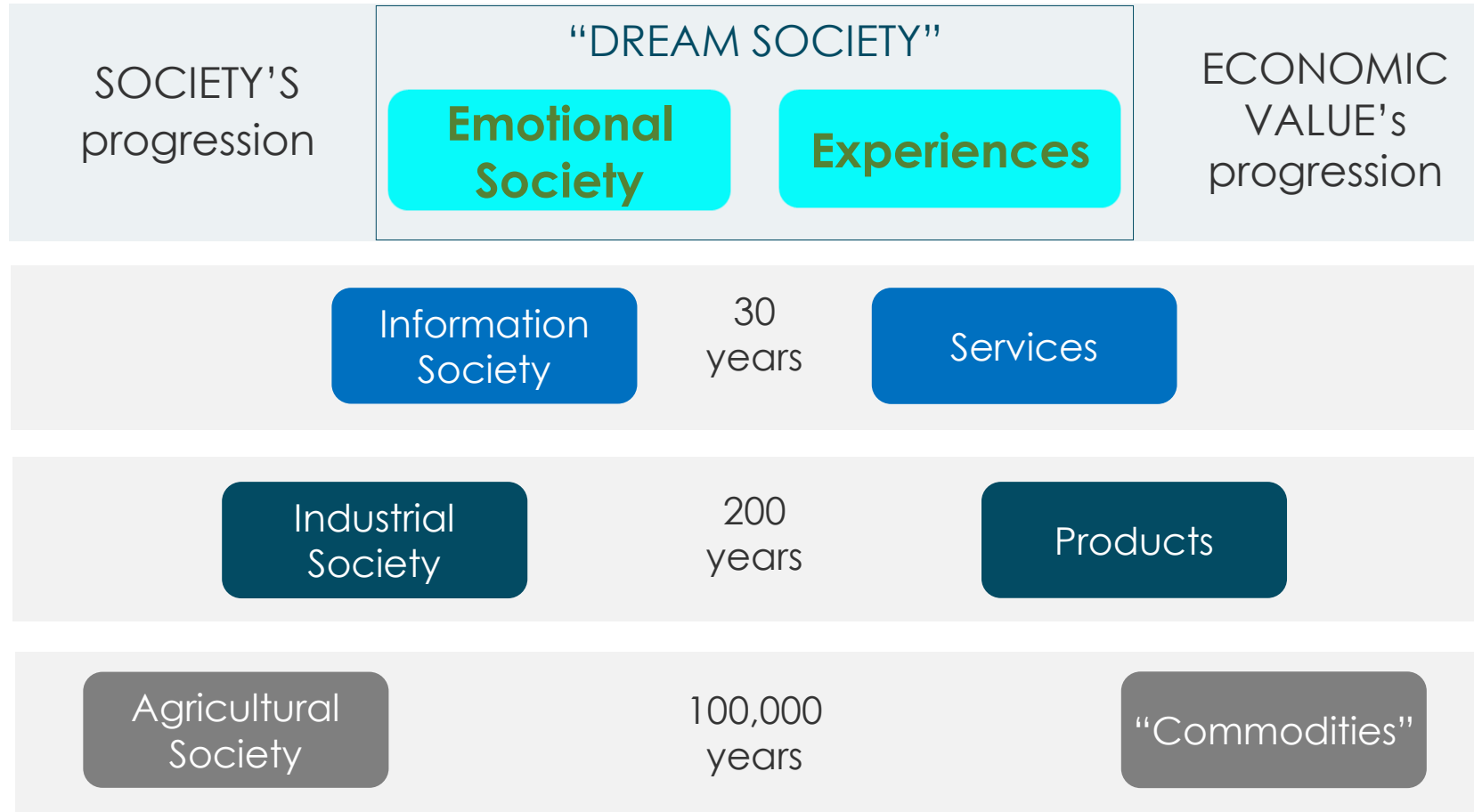
Anche in Liguria il turismo del vino, finalmente regolato da una legge, attira sempre più



Supporting the Sustainable Development Goals

Global Wine Tourism Organization
Organización Mundial del EnoTurismo
Organisation Mondiale de l'œnoTourisme
Organizzazione Mondiale dell'EnoTurismo
Organização Mundial do EnoTurismo
Weltorganisation für WeinTourismus
全球葡萄酒旅遊組織
Всемирная Организация Винного Туризма
Παγκόσμιος Οργανισμός για τον οινοτουρισμό

The “Dream Society” is in search of experiences





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