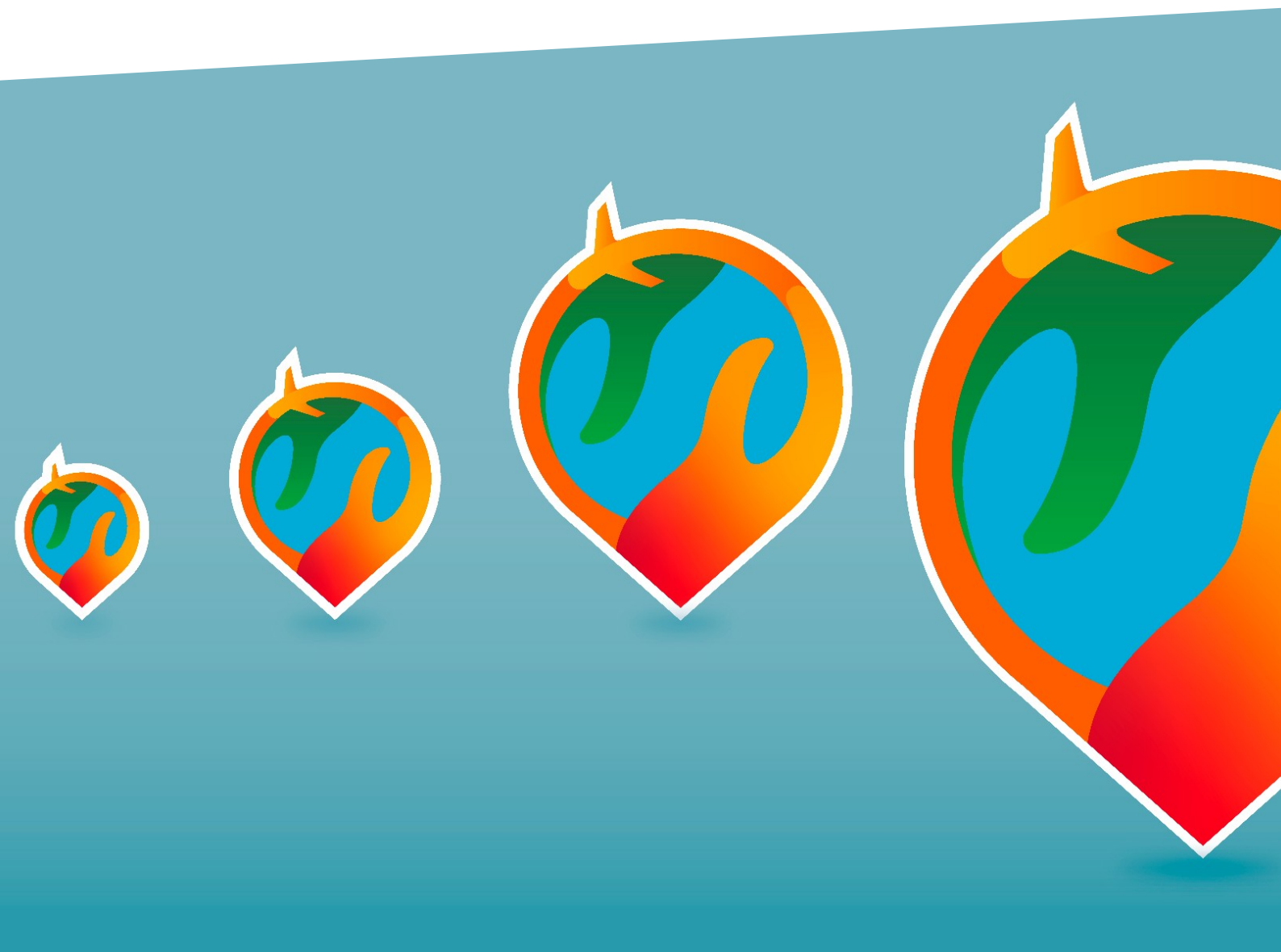


Tourism Recovery and Resilience Dialogue

Executive summary of event 2 on December 9, 2020
on how to use data for a more balanced tourism

by Tourism for Sustainable Development
A Global Initiative for Public and Private Sector Executives



Fachhochschule Graubünden
University of Applied Sciences



Global Compact
Network
Switzerland & Liechtenstein



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO

Executive Summary

The second event of the Tourism Recovery and Resilience Dialogue on December 9, 2020, was dedicated to the challenge of how to use data for a more balanced tourism. The protagonists of this event were Ms. Rosa Bada (Head of Institutional Cooperation of the marketing organisation Turisme de Barcelona), Mr. Ignacio Barrios (CEO of the data analytics company Kido Dynamics), Mr. Jon Erni (Founder and Managing Director of the back-end provider discover.swiss), Mr. Sérgio Guerreiro (Senior Director of Knowledge Management and Innovation of the tourism organisation Turismo de Portugal) and Mr. Jeremy Sampson (CEO of the non-governmental organisation The Travel Foundation).

This executive summary provides three kinds of information and insights:

- 1) conclusions and hypotheses derived from the live discussion between the five protagonists and the audience (pp. 3-4);
- 2) results from the survey conducted with the audience (p. 5);
- 3) key statements from the individual interviews with the five protagonists (pp. 6-15).

During the event, 25 tourism executives participated in a brief survey on using data for a more balanced tourism. Only three of them thought that the destination they work for, or operate in, had already achieved a tourism that balances well economic and non-economic aspects. More than one third thought that their destination did not work on the topic of using data for a more balanced tourism, at all. The big majority considered that their destination had at least a conceptual understanding of what balanced tourism actually means or had started operationalising and implementing this concept.

These results partly support, partly contradict the conclusions and hypotheses that could be drawn from the live discussion among the five protagonists and with the audience.

Conclusions and hypotheses from the live discussion

Destinations have to evolve in their understanding and measurement of “success”

Contrary to what the audience thought, the protagonists largely agreed that destinations had not yet a conceptual understanding of what a successful tourism beyond the generation of investments, income and jobs meant. The challenges are:

- to better understand the economic costs of tourism, including opportunity costs;
- to better understand the benefits and costs in the socio-cultural and ecological dimension.

The protagonists called for a new definition of what success means, and for key performance indicators that allow to measure it by means of data. *Sérgio Guerreiro* of Turismo de Portugal alluded to the old – and rather marginal – endeavour to define and measure economic activities in a country beyond the gross domestic product. *Jeremy Sampson* said that The Travel Foundation, in cooperation with the World Travel & Tourism Council and the European Tourism Future Institute, is working on a destination stewardship diagnostic tool that tries to measure performance from a holistic perspective.

The protagonists agreed on two things: that the COVID-19 context, in which hitherto unquestioned assumptions are being discussed, can be fruitful for collective processes towards a more balanced tourism; and that such processes have to be “close to the people”, i.e. local and inclusive.

Indeed, the recently and broadly enhanced awareness of society’s vulnerability and capacity of change may trigger a breakthrough in waiting. After all, holistic concepts of defining and measuring the economic and business in particular, like a corporations’ “social balance”, people’s “quality of life” or the “economy for the common good”, have been promoted for decades, but with little success. Against this backdrop, the challenge is to adapt such approaches to tourism and the destination level.

Destinations have to put the local community at the heart of this evolution

In a discussion of mainly data-oriented panellists, *Rosa Bada* of Turisme de Barcelona voiced scepticism by cautioning against a purely quantitative understanding and procedure to reach a more balanced tourism. In the end, for a tourism organisation, the local people's preferences and opinions were decisive.

For the two data-specialists on the panel, this did not mean a contradiction. *Jon Erni* of discover.swiss said that the readiness of the people to participate in the gathering of data on their preferences – as locals or tourists – depended heavily on an ethical data policy: the more transparent and rigid data protection, the more likely it was that people shared their data. *Ignacio Barrios* of Kido Dynamics emphasised that data should be used to better communicate with the locals and actually empower them. Only citizens well-informed about the economic, social and ecological impact of tourism were able to decide on what kind of tourism they wanted and how to deal with it in their daily lives.

Against this backdrop, for these data-oriented executives, the real challenge is not data as such. Most agreed that there are many useful data available. More challenging than technology and big data is the underlying cultural transformation, the collective process within a destination to develop a new understanding and practice of a (more) balanced tourism. Data can play a highly positive role in such a process by making people understand better what their choices are as a tourism destination, what benefits and costs different ways of development imply.



Survey results

Where destinations stand

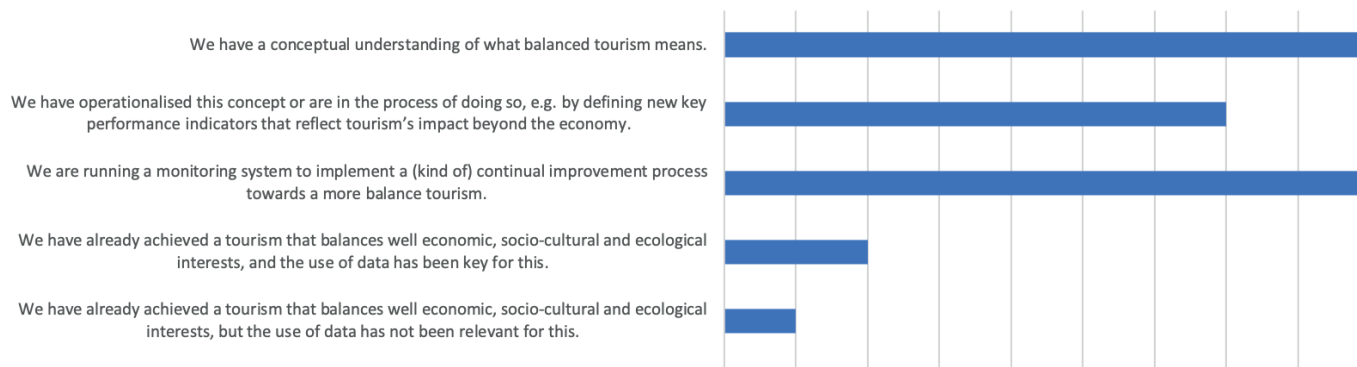
Insight 1:

There is much to do! Only 3 out of 25 executives think that the destination they work for or operate in have already achieved a tourism that balances well economic and non-economic aspects.

Insight 2:

Most are on their way. Out of 37 responses, 25 indicate that destinations have a conceptual understanding of a more balanced tourism or have already operationalised and implemented according measures.

Where does the destination you work for or you operate in stand in using data for a (more) balanced tourism?



The main challenges

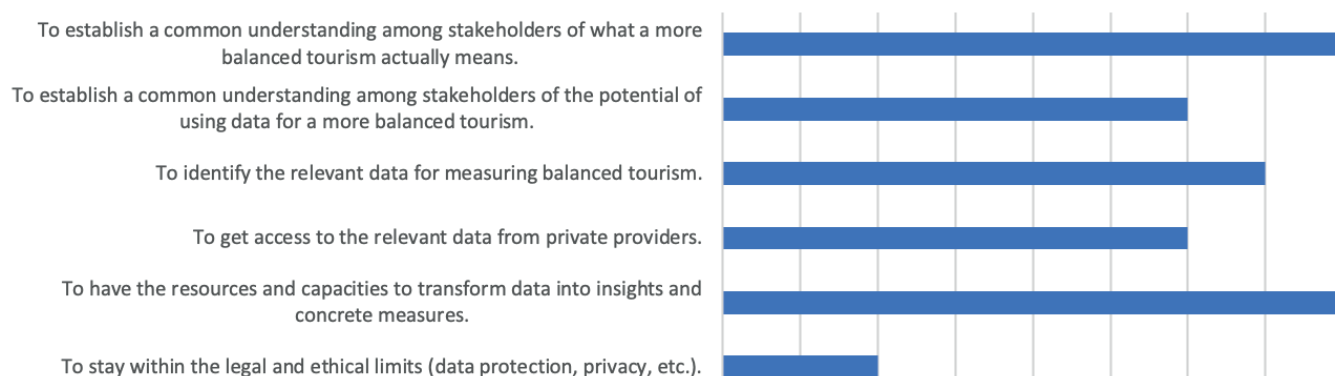
Insight 1:

There is not a singular most important challenge in using data for a more balanced tourism. From conceptual to technical aspects, all are considered more or less equally difficult.

Insight 2:

However, there is a singular least challenging task: Only 2 out of 37 responses refer to staying within the legal and ethical limits as a challenge.

What do you consider the main challenges in using data for a more balanced tourism?





Jon Erni
Founder and Managing
Director

discover.swiss 



[discover.swiss](https://www.discover.swiss) (cooperative)



Back-end provider for tourism
destinations and businesses



Headquarter:
Zurich, Switzerland



Pilot customers:
Destination of Lower Engadin;
Zurich Tourism; Swiss Youth Hostel



<https://www.linkedin.com/in/jon-erni/>

Strategy and measures for a data-based management of tourism flows

As a cooperative owned by a large number of tourism organisations, discover.swiss is a not-for-profit organization that follows the MyData Principles (www.mydata.org). It consists of three modules:

1. content hub (interfaces between tourism businesses and destinations on the one hand and service providers on the other);
2. market place (digital marketing channel);
3. user profile (any traveller in Switzerland can have a personal profile; health data are not, but could be included).

If allowed by the user, and on the basis of strict data protection, discover.swiss sends the traveller push messages and thus guides him/her through the destination. Vice-versa, destinations get informed about tourists' current and possible future behaviour and are thus in a better position to avoid or react to undesired crowds.

Main challenges for a data-based management of tourism flows

1. Make big corporations share their user information with the majority of small and medium-sized tourism businesses
2. Reach the critical number of destinations or businesses within Switzerland or another country to make a not-for-profit cooperative such as discover.swiss a real alternative to big commercial providers

Recommendations and requirements

1. Foster public-private partnerships
2. Create a culture of protecting individual data
3. Create a culture of sharing individual data on an anonymous basis





Ignacio Barrios
CEO



Kido Dynamics



Mobile data analytics



Headquarter:
Lausanne, Switzerland



Customers: Hammad International
Airport, Municipality of Valladolid,
SEGITTUR (Spain), Switzerland Tourism



Sales: € 550'000 vs. € 750'000
(2019 vs. 2020 est.)



19 employees



<https://www.linkedin.com/in/ignacio-barrios-4a573032/>

KIDO DYNAMICS

Strategy and measures for a data-based management of tourism flows

Kido Dynamics offers public authorities and destination management organisations information and metrics based on mobile data, which provide a trend analysis on people's movements in a given area. With a delay of 15 to 30 minutes, customers can be informed about the amount of people within a space of 100x100m².

If complemented by other data, such short- and long-term (structural) analyses can empower three kinds of addressees:

- authorities can control and possibly guide flows of people;
- locals can decide for themselves how to avoid/react to tourism flows;
- tourists can decide how to visit a given destination.

Main challenges for a data-based management of tourism flows

1. In general terms, authorities need to establish their approach to big data and explain it to their citizens: what are our principles and policies, what do we need them for?
2. Regarding tourism, by resorting to conventional sources of data (from hospitality, air travel, etc.), authorities need to be able to answer three questions:
 - a) How many tourists are in our community/destination?
 - b) How long do they stay?
 - c) How much do they spend?
3. Based on this initial understanding, authorities need to define whether there is a need for better forecasting and guiding tourism flows, and in a given case, what data (sources) are necessary to do so, e.g. from mobile operators.

Recommendations and requirements

1. Start with simple solutions, do not overengineer
2. National authorities should consolidate the data of all/more mobile operators
3. If there is a real need, local authorities should consider investing in the “internet of things” (i.e. grasp tourism flows by connecting public cameras, entries to attractions, etc. to an integrated platform)





Jeremy Sampson
CEO



The Travel Foundation

international non-governmental organisation helping to ensure tourism is beneficial for communities & the environment



Headquarter: Bristol, UK



Partner destinations (selection):
Cyprus, Jamaica, Mexico, South Pacific,
Thompson Okanagan, Turkey



10 employees



<https://www.linkedin.com/in/jeremya-sampson/>



Strategy and measures for a data-based management of tourism flows

1. Destinations have to define in a collaborative stakeholder process what “value” means to them, and based on this common understanding plan how to maximise value and return on investment, as well as better understand the implications of growth in order to reduce pressures.
2. Destinations have to define new key performance indicators that capture not only economic, but also socio-cultural and ecological aspects to ensure the benefits of tourism outweigh the negative impacts and costs of servicing tourist demand.

The conceptual foundations of these steps are to be found in the [Invisible Burden Report](#) elaborated by The Travel Foundation and partners Cornell University and EplerWood International in 2019.

A concrete Travel Foundation project to implement these measures was focused on [optimising the tourism mix in Tenerife, Canary Islands](#) (2019). Moreover, The Travel Foundation is collaborating with the World Travel & Tourism Council and the European Tourism Future Institute on a [destination stewardship diagnostic tool](#).

Main challenges for a data-based management of tourism flows

New key performance indicators are required to define and measure what “building back better tourism” after the COVID-19 actually means. It will also be critical to better understand the costs of servicing tourist demand and create more shared accountability for maintaining tourism assets and resources. In order to promote this process, the Travel Foundation and hundreds of other tourism actors from government, business, and the civil society have formed the „Future of Tourism“ coalition.

Recommendations and requirements

1. Destinations need foster collaboration based on common goals, indicators, and data.
2. Big corporations and destinations need to assume more responsibility by collaborating on and applying new performance indicators and shared accountability for shared assets, in order to achieve a more balanced tourism.
3. Become a signatory to the [“Future of Tourism”](#) coalition and demonstrate alignment with its 13 Guiding Principles!





Ignasi de Delàs
Deputy General Director



Turisme de Barcelona



Local tourism organisation
(supported by Municipality and
Chamber of Commerce)



Headquarters:
Barcelona, Spain



Accommodation capacity (2019): ap-
prox. 150'000 beds



Number of tourists: approx. 14 million
(80% from abroad) (2019)
approx. 3 million (-80%) (2020)



Employees: approx. 150'000 (2019)
approx. 132'000 (2020)



<https://www.linkedin.com/in/ignasi-de-del%C3%A0s-11151941/>



Strategy and measures for a data-based management of tourism flows

Turisme de Barcelona pursues the following strategic measures for a more balanced tourism:

1. measure and promote sustainability in all three dimensions (environmental, social, economic);
2. develop digital tools to improve the visitor experience, e.g. an app that informs visitors about affluences, alternative offers, etc.;
3. target tourist segments that fit with the needs of the city of Barcelona;
4. develop knowledge and marketing intelligence, e.g. through the [Observatory of Tourism](#) founded in 2017;

5. collaborate with the metropolitan area, the province and the rest of Catalonia to spread tourism flows.

COVID-19 has accelerated and added the public health risk motive to these measures, but not fundamentally altered them. Several attractions have long introduced measures to better manage tourism flows, e.g. the [Park Güell](#) that was awarded in 2019 for its new visitor management system.

Main challenges for a data-based management of tourism flows

1. Sensitise all actors within the destination for the topic and coordinate efforts.
2. Identify and access the necessary data to define and reach out to the visitor segments that fit the needs of the city of Barcelona.
3. Promote the digitalisation of the tourism industry and the destination.

Recommendations and requirements

1. In a short-term perspective: establish measures of health and security control.
2. Foster public-private partnerships.
3. Make digitalisation a strategic priority.





Sérgio Guerreiro
Senior Director of
Knowledge Management
and Innovation



Turismo de Portugal



National tourism organisation
(supported by government and
private sector)



Headquarter:
Lisbon, Portugal



Number of domestic tourists (2019):
10.7 million arrivals at hotels
(2020 est. -37%)
Number of inbound tourists (2019):
16.4 million arrivals at hotels
(2020 est. -74%)
Foreign exchange revenues (2019):
18.4 bn € (2020 est. -55%)

Strategy and measures for a data-based management of tourism flows

The Knowledge Management unit of Turismo de Portugal works in two ways:

1. to create data and make it available to decision-makers outside and within of Turismo de Portugal (for business development purposes);
2. to foster innovation by connecting tourism with start-ups and other tech companies in a so-called ecosystem of innovation where demand and supply are matched.

Tourism flows shall be better managed by providing destination managers, companies and travellers with data that allows them to take informed decisions. Turismo de Portugal runs the knowledge management platform [TravelBI](#). Regarding innovation tools such as apps are not developed by Turismo de Portugal, but by the companies of the innovation ecosystem. An example of this public-private collaboration is the integration of the [Portugal Clean & Safe](#) stamp, to which more than 24'000 companies have adhered to, and the [Passenger Locator Card](#) by the public health authorities.

Main challenges for a data-based management of tourism flows

1. Access to (big) data: make private companies share their information
2. Access to data is not enough: build up the capacity to process data
3. Interpret the data to create insights for decision-makers in tourism
4. Work transparently
5. Work ethically (data protection)

Recommendations and requirements

1. Tourism organisations should not try to research & develop themselves, but manage ecosystems of innovation
2. Tourism organisations should create mutually beneficial relationships with data suppliers – they can be more than data buyers by helping suppliers make their data more valuable



