

World Tourism Market
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**3. Status and prospects of product development in
the world tourism market**

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Tourism products on offer

- Tourism products, in the tourism industry sense, represent a great and increasing variety corresponding to equally diverse segmentation of demand.
- By and large, tourism demand segments have always consisted of three major groups:
 - those travelling at leisure on their own account (personal, household), usually in seasonal periods,
 - those visiting relatives and friends and migrations-driven where tourism facilities are shared between the visited and their visitors,
 - those practicing obligated travel on the account of the professional activity and occupation, which in great part is serviced by the meetings industry.

Forms of organization, a great variety of travel arrangements

- Independent travellers (individuals, affinity groups)
- Group travellers (travelling together, to meet at airport or/and destination)
 - Self-made arrangements, dynamic packaging
 - Professionally-assisted travellers
 - By tourism professionals
 - Ready-made packages
 - » All-inclusive
 - Tailor-made packages
 - Assisted by online travel agencies and reservation systems
 - Arrangements by human resources departments (at company, organization level) or self-employed
 - Tailor-made packages

Target group 1: travel at leisure

- Group 1. Leisure travel, financed by households from consumer, dispensable and socially assisted income
 - A variety of tourism products around comparative advantages, assets, attractions, centres of interest (motivations) and special interests
 - Mass and niche products
 - Social group segmentation
 - Forms of organization (organized, independent)

More on Target Group 1 – Leisure travel

- In season and public holidays
 - Summer holidays
 - Sun & beach
 - Rural tourism
 - City Tourism (breaks, stays)
 - Cultural tourism
 - Adventure tourism
 - Mountain tourism
 - Special interest niche tourism
 - Food tourism
 - Sports tourism
 - Winter holidays
 - Same breakdown to some extent
 - Breaks
 - Same breakdown to some extent
- By societal groups
 - Elite (Affluent)
 - Working class (employed, self-employed)
 - Families (with small children)
 - Youth and students
 - Seniors
 - Other segmentation
 - Out-people

Coastal and maritime tourism

- Coastal and maritime constitutes the larger tourism sector the world over, including in Europe.
- *The extraordinary beauty, cultural wealth and great diversity of EU's coastal areas have made them the preferred destination for many holidaymakers in Europe and abroad, making coastal and maritime tourism an important tourism sector.*
- *Employing over 3.2 million people, this sector generates a total of € 183 billion in gross value added and representing over one third of the maritime economy.*
- *As much as 51% of bed capacity in hotels across Europe is concentrated in regions with a sea border.*

Coastal and maritime Tourism (2)

- *As part of EU's Blue Growth strategy, the coastal and maritime tourism sector has been identified as an area with special potential to foster a smart, sustainable and inclusive Europe.*
- *It is the biggest maritime sector in terms of gross value added and employment and, according to the Blue Growth Study, is expected to grow by 2-3% by 2020.*
- *In 2012, Cruise tourism alone represents 330,000 jobs and a direct turnover of €15.5 billion and is expected to grow.*

*From Study in support of policy measures for maritime and coastal tourism at EU level,
European Commission, Brussels, 2013*

Sun & Beach

- Despite increasing concern over excessive sunbathing for its detrimental health effects, sun & beach stays as a perpetual, majority tourism product in mass holidaymaking.
- Sun & beach destinations compete in terms of management, safety, accessibility, quality, hygiene, environmental standards (Blue Flag in Europe)
- **ISO** has put in place international standards
 - ISO/DIS 13009 *Beaches -- Criteria to render the service*
 - ISO 20712-1:2008, *Water safety signs and beach safety flags – Specifications for water safety*

Slunchev Briag - Black Sea

- Sun & Beach continues to feature as No.1 tourism asset of Bulgaria



“All – inclusive” = “all exclusive”



Nudist holidays as part of Sun & Beach

Consumer profile, Gheisa Natour (luxury tours)

Consumer profile

- Middle-upper class
- +35% expenditure (due to accommodation)
- All package expenditure up to €8000
- 60% - aged between 25 and 35 yrs
- Families
- University graduates, liberal professions, doctors, artists
- Caretakers of the environment

252 nudist beaches in Spain attended by half a million holidaymakers a year

South Korea is considering setting up the country's first nudist beach (by 2017) in an attempt to boost tourism



First cruise for 450 pax. in 2004 between Ibiza, Sardinia, Rome, Corsica, Nice and Barcelona



Vacation time-share today

- Nominal “owning” the place or vacation time at a fixed date and paying a corresponding maintenance fee
- Boom at the break of 20th and 21st centuries and later stagnating
- Recently thriving online despite slow economy
 - Savings on commissions and middlemen

Hyatt Hacienda del Mar timeshare



Virtual tourism (sightseeing) on the beach in Cape Town

- Cape Town is expecting a massive influx of extra visitors in the next three months without many of them actually going to the city in real life (as yet! says the tourist board)
- These will be virtual visitors experiencing the delights of the Cape via a world-first Facebook-based travel app.



Cruises

- Luxury all inclusive



- Romance & senses



Cruise industry

- Cruise market on the increase, the best performing leisure tourism sector promising (and delivering) complete consumer fulfillment
- A product for all ages and groups
 - Families with small children
 - Ready to fall in love/ newly weds
 - Seniors
 - Affinity groups



Cruise tourism (case: Latin America and the Caribbean)

- Regional cruise tourism in 2011-2012 generated more than \$1.9 billion in direct expenditures, 45,000 jobs and \$728 million in employee wages among 21 destinations surveyed
 - Cruise passengers (15.44 million) spent \$1.48 billion
 - Crew members (2.7 million) spent over \$261 million
 - Cruise lines spent an estimated \$246.9 million (port fees and taxes, utilities, navigation services and ship supplies).

Source: Business Research and Economic Advisors for FCCA



Limitations to cruise industry

- Environmental damage
 - Compliance with IMO conventions
 - Active role of CLIA (Cruise Lines International Association)
- Cultural conflicts due to massification/overtourism
 - *No alle grandi navi a Venezia*
- Unfair sharing of economic benefits

New Venice attractions



The dark side of Mediterranean “cruises” - voyage to better life and “luxury” (or death...)



Theme parks: Case: Le Grand Parc du Puy du Fou, Les Epesses, France

- The park presents 60 spectacular shows per week and houses 4 historical villages, 25 restaurants, and 3 themed hotels. On March 17, 2012 the Thea Classic Award (the Oscar for the theme park industry) was presented to Le Puy du Fou at a ceremony in Los Angeles. The Thea Award is made to theme parks which the **Themed Entertainment Association (TEA)** considers have distinguished themselves.
- Every year the park brings in some 1.5 million visitors, making it the fourth most popular attraction in France.



Chinese Theme Park Boom

- In 2013, the Chinese government lifted a ban on theme park approval, enabling parks under US \$ 800 million to be approved at the provincial level, encouraging investors.
- According to *Euromonitor International*, the value of theme park sales in China is predicted to reach nearly US \$ 12 billion by 2020, with visitor numbers surpassing 330 million.
- Disneyland Shanghai opened in June 2016, catering to the Chinese consumer, with over 80% of rides unique to the park and costing US \$ 5 billion.
- Local rival, Dalian Wanda Group opened US \$ 3 billion Nanchang Wanda City, with a greater Chinese cultural focus and ticket prices half those of Disney.
- Lewa Happy World opened in Xian in 2015, and a second Wanda City was scheduled to open in Hefei in the last months of 2016.

International Players Take Note

- International players **Disney** and **Universal Studios Inc.** have focused their attention on China's wealthy coastal regions with local developers looking more to inland cities.
- The first international theme park for Western China, **Chongqing Riverside-Six Flags Theme Town**, will open in 2019, located near a large population but limited attractions.
- Local theme parks tend to operate a mixed tourism and property business model, with revenues from hotels, shops, and apartments often more profitable than ticket sales.
- Other Asian countries are also enjoying success with the the opening of **20th Century Fox World in Malaysia**, and **Lotte World** in South Korea being popular with Chinese visitors.

China theme parks going West

- **Wanda Group** has taken the bold step of Launching **EuropaCity** with Immochan, a US \$ 3 billion project incorporating a theme park and shopping mall 10 km outside Paris.
- The mix of shopping and attractions is a hugely attractive combination for a mix of nationalities and ages, and proved to be very successful on opening in 2012.
- A further two overseas parks are planned by Wanda, but locations have yet to be fixed.
- It is questionable whether the Wanda offer will appeal to Western consumers.

China theme parks going West (2)

- Recent queries were raised about the closure of **Wanda Park in Wuhan** for early refurbishment and the appearance of fake Disney characters in a Nanchang park.
- China is already No.1 in theme park sales, after US, Japan, UAE, France and UK

Shopping or mall tourism

- Trips to consumer temples (Dubai)



An emerging trend: local food tourism

- Food tourism is about travel at leisure where the attractiveness and quality of local food to be served on the way to and at destination, appears as a collateral factor on which to build a tourism product.
- Food Tourism is for *gastronomads* (term coined by French food writer Maurice Edmond Sailland - Curnonsky, the inventor of gastronomic motor-tourism as popularized by Michelin, following the trails of ancient Greek Arquestratos (IV c. B.C)
 - *Homo festivus* on the move
- Food tourism is about tasting and learning to prepare local food.

Local food as a tourism product

- Local food is best experienced in rural tourism (agrotourism).
- It may not be an obvious purpose of leisure travel, except for specific products (such as the case of wine tours associated with local food), but has an enormous power and potential intervening in tourist satisfaction.
- Food appears as number 1 item in travellers' experiences of a trip.
- Wine, coffee and other food trails relate to the industrial heritage of agriculture and feature local food service.

Local food: the term

- The term (not widely used) was coined for the World Tourism Organization conference on “Local Food & Tourism” held at Larnaka, Cyprus, 9 -11 November 2000
- Approximate and related terms
 - traditional cuisine
 - » regional cuisine
 - traditional specialties and recipes
 - culinary heritage
 - slow food
 - seasonal food (therefore, not imported)
 - *terroir* food (France)
 - *Peasant fare* (“Chłopskie jadło” – in Poland)
 - the nouvelle cuisine of Paul Bocuse (enhanced and refined food based on seasonal products from a nearby (own) orchard or farm)



What does local food stand for?

Local food characteristics:

- It best represents the natural quintessence of the place
- Considerably contributes to local (regional, national, ethnic) cultural identity
- Reflects the evolving human structure and variety of the place visited
- Ensures the most powerful, natural linkage to the place visited (communion, *enosia*)
 - *There is nothing so intimate as food that one can entirely assimilate*
- Is contrary to global uniformity (within its variety) of food
- A tourist visit is never genuine if local food is not experienced

When travellers come across it: local food requirements

- Local origin of foodstuffs and seeds (foods and crops proper of the area, authentic)
- Foodstuffs representing local agricultural diversity, as much as possible
- Locally grown foods
 - Short F2F distance: from field to fork
 - Local (organic) fertilizers
- Locally processed foods
- Food safety
- (Local) foods subject to local culinary art, recipes and traditions
- Local food cuisine practices or culinary art also present at (majority) local households
- Participation by travellers in local eating habits and rituals
- Local food lending itself to rural tourism

Local food as seen by the consumer

- Food served to travellers and residents doesn't stop to be local as long as it adheres to these principal requirements (some ingredients may be imported).
- In its “pure” or primitive form it may (will) not appeal to all types of travellers, or even may not be opt for them
- The visitor may not be aware that the food served is typically local
- Local food can only be fully appreciated in the place of its origin
– it will never be complete (sufficiently authentic) when displaced from its natural sensorial setting – although imitations are welcome!

- *Pizza in Borgo Antico
Florence, Italy*



How have local food and dishes transmuted and/or travelled to other places

Examples (*in addition to burgers and American pizza ...*)

Curry dishes and kedgerree (*kitcheri*) in UK



Halal fast food in/from
Belgium and France



Andalusian gazpacho, now exported
from Spain by *PepsiCo*



Healthful, local eating trend is now “officially” everywhere as farmer's market pops up in airport terminal

- The New York-based airline **JetBlue** is putting a farmer's market into their terminal at JFK, offering homemade apple pies, jams, honey, peach relish and more. The market will offer flyers healthful options to bring on their flights and is being done in conjunction with **GrowNYC**, which operates greenmarkets throughout New York City.
- Healthy food sections are now to be found everywhere in the airport environments.

Khozaistvennyi tourism in East Siberia (Russian Federation)

- In Tarbagatai, tourists are fed traditional food that is all made from scratch from products cultivated in the large gardens that are found on each piece of property.
- The families that host tourists are extremely outgoing, friendly, and create an extremely memorable experience.
- Meals are ended with a traditional Old Believer wedding ceremony.
- Guests are dressed in Old Believer clothing and treated to a performance of song and dance.
- Rather than being awkward, the ceremony is filled with humour.
- Homemade vodka (*samogon*) that is often served with dinner fuels the laughter.



Local food...

- The term “local food” allows flexibility
- The concept is conventional
 - There can be no definite or permanent local food standard, but the basic requirements of authenticity should be met to the maximum
- There is no real limit to local food development
 - Local food can adapt to the needs, likes and expectations of travellers.
 - Processing local foodstuffs may adapt and lend itself to new technologies, findings and recipes in this area.
 - Growing and raising local foods also lend themselves to new progressive, agricultural techniques
 - A local food product can be novel and bring about a new local brand to become internationally famous

Food tourism anecdotes

10 Healthiest Eating Habits (traditional)

- **Japan** – emphasis on overall presentation. Helps keep portions small and veggies on every plate
- **China** – chopsticks help slow down the intake of food
- **France** – concern about taste, indulging in small portions
- **Ethiopia** – emphasis on root vegetables, beans and lentils
- **India** – focus on spices, can help lower cholesterol
- According to researcher Natalie Sexenian, Bellucci Premium
- **Mexico** – the largest meal of the day occurs at midday, not at night
- **Italy** – wine: one glass for women, two glasses for men
- **Greece** – Mediterranean diet focusing on fruits, veggies and grains
- **Sweden** – rye bread containing fiber
- Minority, but significant case in the **U.S.A.** – some individuals eat a healthy diet based on fresh local products not treated with pesticides

Apology of food tourism

- Food tourism is an authentic experience of a sophisticated lifestyle in a pleasant environment associated with the good life and the economic well-being of consuming exclusive, high-quality locally grown products.

(UNWTO Global report on food tourism)

Another kind of rural and ecotourism

Wild flowers and walking bring in high-spending tourists

- Started by Slovenia and extended to Bulgaria, Croatia, Scotland, Romania
- In Bohinj (Slovenia) the wildflower meadow project aims to get 1,000 stories about 1,000 wildflowers to complete the meadow and create a community history archive
- Flower festivals to run from May 2013



- Blodeuwedd - Flower Face | Artist: Seona Anderson



City tourism

- *The city is built with the aim of attaining happiness (Aristotle)*
- Cities represent proximity and population density, but also privacy at the same time. In an increasingly globalized world, cities are interconnected nodes.
- City tourism as yet another face of urbanization and globalization by means of tourism. Consumer visitors to cities “have replaced” the former pilgrims and merchants. These categories of travellers were commonplace and numerous in cities throughout centuries.
- Tourism is an important element in all policies related to urban development.

Arguments in favour of city tourism

- City tourism is growing faster and is more resilient than global tourism.
- Promoting city tourism 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 more infrastructures and bring conditions to residents.
- It drives the development of the destination's tourism sector as a whole and is a vital force for economic growth.
- When it comes to leisure and culture, modern and smart cities compete for visitors and their own residents: the latter are encouraged to stay for an attractive holiday.

Core strategies for competitive cities as **TOLERANCE**

These include:

- T – Foster **T**alent and Embrace **T**echnology
- O – Be **O**pen to Diversity
- L – **L**ead in Innovation (balanced with tradition)
- E – Target the **E**merging Markets
- R – Build **R**esponsible City Tourism
- A – Grow **A**tractiveness, **A**ssets and **A**ccessibility
- N – Create **N**etworks
- C – Compete with **C**ulture, Content and Authenticity
- E – Adopt **E**-Marketing

Source: 2013 Tourism Intelligence International: *Cities on the Rise - Competitive Strategies for City Tourism*, Trinidad, West Indies

Top City Destinations in the World

- Bangkok
- London
- Paris
- Singapore
- New York
- Istanbul
- Dubai
- Kuala Lumpur
- Hong Kong
- Barcelona

Tourism carrying capacity in city tourism

Overcrowding - Overtourism

1. Price Is Part of The Problem

- The expansion of low-cost carriers around Europe has made it cheaper and easier than ever to reach cities that were usually expensive. The proliferation of additional cruise ship stops in cities like **Venice** and **Barcelona**, as well, have exacerbated the problem.

2. New Neighborhoods Create New Problems

- Cities like **New York** have encouraged tourists to visit neighbourhoods off the beaten path to reduce crowding at the quintessential tourist hotspots. Locals can no longer go about their lives without being disturbed by throngs of tourists, and often avoid patronizing local businesses during times when tourists are present. Over time, this leads to a new crop of businesses popping up that cater to tourists, not locals.

Overcrowding - Overtourism (2)

3. Travel Companies Need to Own Up

- Hotel chains, airlines, cruise lines, and roomsharing services have each played a role in creating a hostile environment for locals in the destinations they serve.
- Tourism needs to better incorporate values that don't perfectly align with its own growth and self-interest.

4. It's Up to Government Leaders To Solve Overtourism

- Local governments must insist on limitations on tourism, which can be accomplished through taxation and tourist caps.

Source: SKIFT

- *Being tired of tourism upsetting city life of residents is clearly shown in the Western world (only).*

An answer: Quite zones?

- The “quiet zones” □ are emblematic of the Danish philosophy toward tourists: They should blend in with the Danish way of life, not the other way around.
- The Danes have prohibited foreigners from buying vacation cottages on their seacoasts; devised their famous bicycle-friendly transportation system to include tourists;
- They also strictly limited bars and restaurants from taking over Copenhagen.

An answer: Quite zones? (2)

- Testimony from Copenhagen: “as we glide under a bridge on the city canal tour, our guide announces that we have entered a quiet zone. “This is a residential area,” □ she says, nodding toward balconies where Danes are enjoying coffee, or maybe wine. “I’ll resume talking in five minutes.”
- Denmark is one of the world’s top destinations for conferences and a mainstay of trans-Atlantic cruise ships. Attracted by noir detective series and fashionable cuisine, nine million tourists last year visited this city, a record for Denmark, which has fewer than six million people.

Target group 2

- Group 2: Personal and family visits (VFR) at leisure or under emergency, related to migrations, financed by households of both visitor and host
 - A variety of enabling circumstances encouraging VFR travel
 - Forms of organization
 - Reduced tourism sector capacity to offer pre-paid “products” (packages of services)
 - Except for diaspora tourism (very important)

Interfaces of tourism and migration

Effects of migrations and migrations-driven tourism

Originating market

1. Human migrations

- Brain drain (short/medium term)
- Savings on health and social security provision
- Reduction in tax revenues

Destination market

- Additional pressure on social and economic structures
- Competition leading to wage reduction (short term)
- Counteracting population decline and ageing
- Increased tax revenues and consumer spending
- Crime and human trafficking
- Social conflict

Interfaces of tourism and migration

Effects of migrations and migrations-related tourism (2)

Originating market

2. VFR tourism

- Reduction in domestic market
- Increased visibility in destination market

3. Skills

- Loss of professional skills
- Future skills enhancement (if migrants return)
- Emergence of a new class of entrepreneurs
- Growth in sex tourism

Destination market

- Increased international markets
- Enhanced visibility in originating markets

- Packages to attract fresh talent
- Enhanced language skills
- Increased 'overseas' fees for educational institutions

Interfaces of tourism and migration

Effects of migrations and migrations-related tourism (3)

Originating market

- 4. Remittances
- Additional revenue, contributing to increased consumer spending
- 5. Foreign direct investment (FDI)
- Well-informed investment in travel, tourism and hospitality
- New investment streams
- 6. Expat tourism
- Higher value visitors

Destination market

- New relationships and investment partnership opportunities

Tourism products for people with disabilities

- The supply and demand dimension of the world tourism market is also determined by the potential of beneficiaries of social tourism and people with disabilities.
- They can be economically assisted and/or enabled to travel.
- In the first case this can be done by means of a respective tourism and social policy (in place in a few EU/OECD countries and promoted by EU *Calypso* programme).
- In the second one, by means of simply complying, at state level, with the United Nations Convention on the Rights of People with Disabilities (2006). Its numerous provisions refer, directly and indirectly, to tourism opportunities for those eager to engage in tourism (touring, sightseeing, or even traveling for obligated purposes).

Tourism products for people with disabilities (2)

- In the area of air transport it is about compliance with Annex 9 of the Chicago Convention on International Civil Aviation (ATTACHMENT 2: ICAO Recommended Practices relating to Persons with Disabilities) and the respective mirror European law on civil aviation.
- The European Union requests national statistical offices to report main reasons for not participating in tourism for personal purposes. It is an indirect incentive seeking to enable governments to undertake actions to make such participation possible.
- Another European Union measure has been to promote barrier-free and sustainable tourism by means of competition (EDEN).

Main reasons for not participating in tourism for personal purposes to be reported to Eurostat

- Number of residents, aged 15 or over, not participating in tourism for personal purposes during the reference year (i.e. not having made any trip with at least 1 overnight stay for personal purposes during the reference year)
- a) Financial reasons (no money available for holiday trips, cannot afford to go on holiday)
- (b) Lack of free time due to family commitments
- (c) Lack of free time due to work or study commitments
- (d) Health reasons or reduced mobility
- (e) Prefer to stay at home, no motivation to travel
- (f) Safety
- (g) Other reasons

Data asked to be collected by socio-demographic breakdowns with respect to non-participation (Eurostat reporting)

- 1. Gender
- 2. Age group
- 3. [optional] Educational level
- 4. [optional] Employment situation
- 5. [optional] Household income

European Union countries (27): Eurostat survey on holiday travel potential of people with disabilities (2005)

Total demand of accessibility	70% is economically and physically capable to undertake a trip	Multiplying effect inclusive of accompanying persons (family members, friends, assistants)	Accompanying persons (family members, friends, assistants)	Total potential demand per trip	Average spend on holiday trip	Potential collective income by suppliers
127.5 mn	89.3 mn	2	178.6 mn	267.9 mn	€620	€166 billion

2013 EDEN awards criteria

The winners had to demonstrate that their destination:

- is barrier-free (infrastructure and facilities)
- is accessible by transport means suitable for all users
- has high quality services provided by trained staff
- has activities, exhibits, attractions in which everyone can participate
- has marketing, booking systems, web sites and other information services which are accessible to all.

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **1. Kaunertal Valley, Austria** - has a long history of providing wheelchair friendly infrastructure, beginning in the late 1970s with the opening of the Kaunertal Glacier Ski Resort.
- **2. Ottignies-Louvain-la-Neuve, Belgium** - From day one, Louvain-la-Neuve was designed and built with the idea of making the city accessible to all.
- **3. Stancija 1904 – Svetvinčenat, Croatia** - Most of the venues of 'Stancija (gardens, terraces, beaches) are accessible to all. Menus are printed in Braille.
- **4. Polis Chrysochous Municipality, Cyprus** - Wheelchair users can get to the beach using an innovative electronic system powered by photovoltaic panels. Many pavements in local towns and villages have ramp access. A number of hotels and apartments are wheelchair friendly, offering all comforts and amenities for disabled visitors. The Municipality has installed special infrastructure for recharging electric wheelchairs.

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **5. Lipno, Czech Republic** - Many sites have pedestrian only access and many paths and walkways around the lake are wheelchair friendly. The staff at the information centre in Lipno and Vltavou have been trained to understand the needs of mobility impaired visitors.
- **6. Haapsalu City, Estonia** - has a long history of hosting people with disabilities. The Läänemaa Chamber of Disabled People is a local umbrella organisation that brings together disabled peoples' groups from across the country and regularly discusses accessibility issues.
- **7. Morvan Regional Natural Park, France** - The local authorities have also made sure that specially adapted equipment is available for disabled people who want to enjoy popular activities at the "Maison du Parc"
- **8. Municipality of Marathon, Greece** – among other features "The Nea Makri beach has been equipped with a special solar powered electric seat, which can help disabled visitors reach the sea.

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **9. Kaposvár and the Zselic area, Hungary** - There are 106 fully accessible pedestrian crossings, lamps and audible signals to assist disabled visitors. The city tourist information centre has full wheelchair access and provides Braille maps and audio guides for the visually impaired. The city's museums, art galleries and cultural centres are also fully accessible for all visitors.
- **10. Cavan Town and environs, Ireland** - Since 2007 major work has been carried out to create tactile footpaths, pedestrian crossings and level paths. Accessible fishing is available at many of the county's 365 lakes; most local parks and amenities have been designed to accommodate all visitors.
- **11. Pistoia, Italy** - The Province of Pistoia has drawn up a number of suggested itineraries in the historic city centre which include specific information on accessibility for anyone with a physical disability. The "Tactile Museum" of Pistoia is a permanent exhibition designed to present the city to the visually impaired.

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **12. Liepāja, Latvia** - in recent years the authorities have worked with non-profit groups to put in place a number of accessibility initiatives. The needs of blind and partially sighted people, Special walking trails have been created through the city's historical centre, including sections with descriptions of tourist attractions written in Braille. A trail near the Liepāja Lake allows bird watching for people in wheelchairs and there is also a beach that has been adjusted to meet the needs of visually impaired visitors and wheelchair users.
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- **13. Telšiai, Lithuania** The main city street has tactile pavements designed to help blind and partially sighted people walk safely. The city's main public buildings, shops and banks have wheelchair access. The city tourist office organises guided tours of the town using sign language for deaf and hearing-impaired visitors

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **14. Horsterwold, Netherlands**
- The woodlands of the Horsterwold are accessible for everyone, plenty of places to stop for a cup of coffee while charging your electrically powered bike, which can be rented in the village and is very suitable for older people safe bicycle roads are accessible for walkers and wheelchairs due to the even surface of the pathways.
- **15. Przemyśl, Poland** inhabitants are keen to welcome disabled tourists, seniors and families with children. Most public buildings, museums and shops as well as a number of hotels are equipped to welcome disabled visitors.
- **16. Jurilovca, Romania** -Efforts are being made to ensure that all visitors can have an equally enjoyable holiday here. The local tourist centre is on hand to help all visitors find answers to any questions they may have during their stay in the region.

19 best European destinations for barriers-free and sustainable tourism (EDEN edition 2013)

- **17. Laško, Slovenia** Facilities provided include buildings with wheelchair access, documentation in Braille, accommodation for guide dogs and induction loops for people with hearing problems.
- **18. Natural Park of Guara's Mountains and Canyons, Spain**
Since 2006, the park authorities, the business community and non-governmental organisations have been steadily improving accessibility to the site for all visitors.
- **19. Taraklı District, Turkey**
Since 2010 the local authorities along with non-profit groups and the business community have worked to make Taraklı an accessible destination for all tourists. All important sites are barrier-free and infrastructure can be used by all residents and visitors. Many hotels offer services for guests with mobility problems.

The power of youth travel on the rise

- Youth travel represents not just an important market segment, but also a vital resource for innovation and change.
- Youth travel has grown rapidly in recent decades as living standards have risen and the populations of developing countries are starting to travel for the first time.
- The first-time travellers are often characterized by being young and comparatively affluent.
- Young travellers are a growth market globally, while the spending power of older generation in Western economies may decline in the long run.

Travel underpins many different aspects of youth lifestyles

- Travel is a form of learning
- Travel is a way of meeting other people
- Travel is a way of getting in touch with other cultures
- Travel is a source of career development
- Travel is a means of self development
- Travel is part of their identity – you are where you`ve been
- The way of travelling reflects the youth actual characteristics

Target group 3

- Group 3: Obligated travel at non-leisure time, financed outside personal (household) income and charged to the organization concerned due to professional activity and occupation
 - A variety of enabling factors and circumstances
 - Includes incentive travel for staff
 - Forms of organization
 - Ample tourism sector capacity to offer pre-paid products (packages of services)
 - Meeting industry (MICE sector)

Key findings on the meetings industry related to target group 3

- There is a growing trend in the number of meetings held worldwide.
- When there may be a temporary decrease in the number of meetings, it is followed by an increase in the total number of participants in the events taking place.
- Nonetheless, The duration of all events, including exhibitions, conventions and incentive travel is becoming shorter.
- The number of new competitors in the Meetings industry, such as China and Dubai, is increasing.
- The incentive travel area remains the most lucrative, but also the most volatile component of the meetings industry.

World tourism market

3. Status and prospects of product development in the world tourism market

End of chapter 3

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