UNDERSTANDING AND QUANTIFYING MOUNTAIN TOURISM

12th World Congress on Snow, Mountain and Wellness Tourism
Andorra, 20 March 2024

The Context

- Mountains are home to around **1.1 billion people**

- Mountain tourism has become an **increasingly relevant motivation for travel**, from nature and open-air destinations to outdoors activities like walking, climbing and winter sports

- Mountains also attract visitors with their rich **biodiversity** and vibrant local **cultures**

- Many mountain destinations showed particular **resilience** during the pandemic

- Tourism has proved to be a **lifeline** for many communities in mountain regions and can play a leading role in protecting these fragile ecosystems

- However, **quantifying** its volume represents a challenge due to the lack of data

Understanding and Quantifying Mountain Tourism

The joint UN Tourism-FAO-Mountain Partnership (2023) study:

- Addresses the lack of current of relevant **data** and improves the **understanding** of mountain tourism

- Aims to provide an **estimate** of the **share of mountain tourism in international tourism** at global level and by region

- Identifies **trends** highlighting opportunities and challenges in mountain tourism

- Provides a set of **recommendations** to advance the **measurement** of mountain tourism, including the use of big data and new technologies

Understanding and Quantifying Mountain Tourism

ESTIMATING THE SIZE OF MOUNTAIN TOURISM

- *Methodological Approach*

What is *Mountain Tourism?*

According to UN Tourism definition:

Mountain tourism is a type of "*tourism activity* which takes place in a defined and limited geographical space such *as hills or mountains with distinctive characteristics and attributes* that are inherent to a specific *landscape, topography, climate, biodiversity* (flora and fauna) and *local community*. It encompasses a broad range of *outdoor leisure* and *sports activities*."

Source: Based on UN Tourism definition

Breaking down *Mountain Tourism*

Tourists are attracted to mountains for **leisure reasons**:

- Seeking the **climate**, the **clean air**, and uncrowded **open spaces**
- Enjoying **beautiful**, **unspoilt** and **preserved sceneries**
- Experiencing **local traditions**, and simple **life-styles**
- Practicing **activities** and **sports** that require **steep slopes**

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| A | Landscape and topography | *Where ?* |

Mountainous areas
Mountain ranges and peaks
Sightseeing spots / Attractions

| B | Climate and biodiversity | *Why ?* |

Protected and sensitive areas (National Parks or similar)
UNESCO World Heritage Sites
Glaciers / Forests / Caves / Lakes / etc.

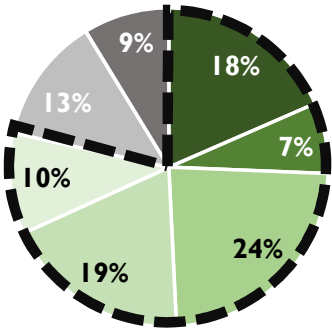| C | Leisure and sports activities | *What ?* |

Hiking / Cimbing / Adventure activities
Skiing / Ski Mountaineering
Nature / Cultural Discovery

Identifying *Mountain Destinations*

Target destinations mountain tourism

- **Class 1.** elevation > 4,500 m
- **Class 2.** elevation 3,500 – 4,500 m
- **Class 3.** elevation 2,500 – 3,500 m
- **Class 4.** elevation 1,500 – 2,500 m and slope ≥ 2°
- **Class 5.** elevation 1,000 – 1,500 m and slope ≥ 5° or local elevation range [7 km radius] > 300 m

- **Classes 6 &7.** elevation 300 – 1,000 m / local elevation range > 300 m
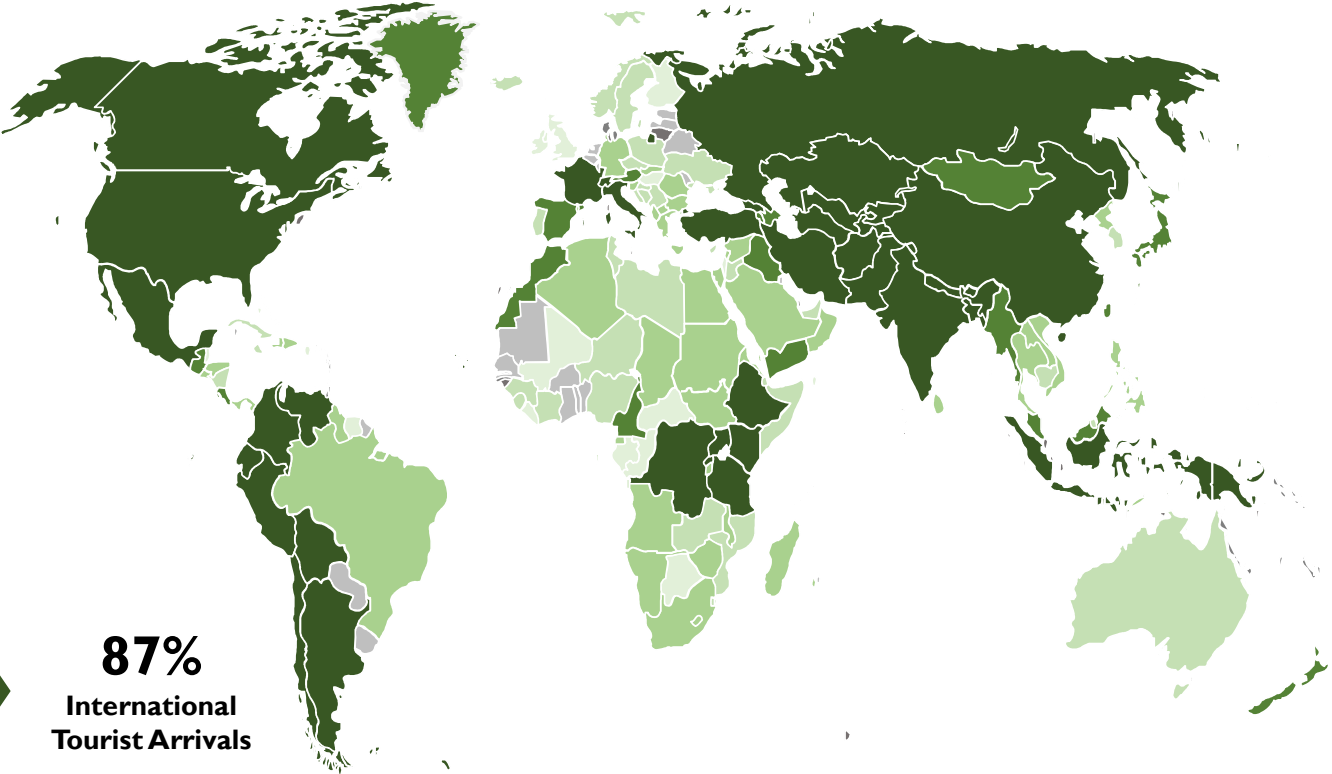- Not classified

Countries by highest peaks

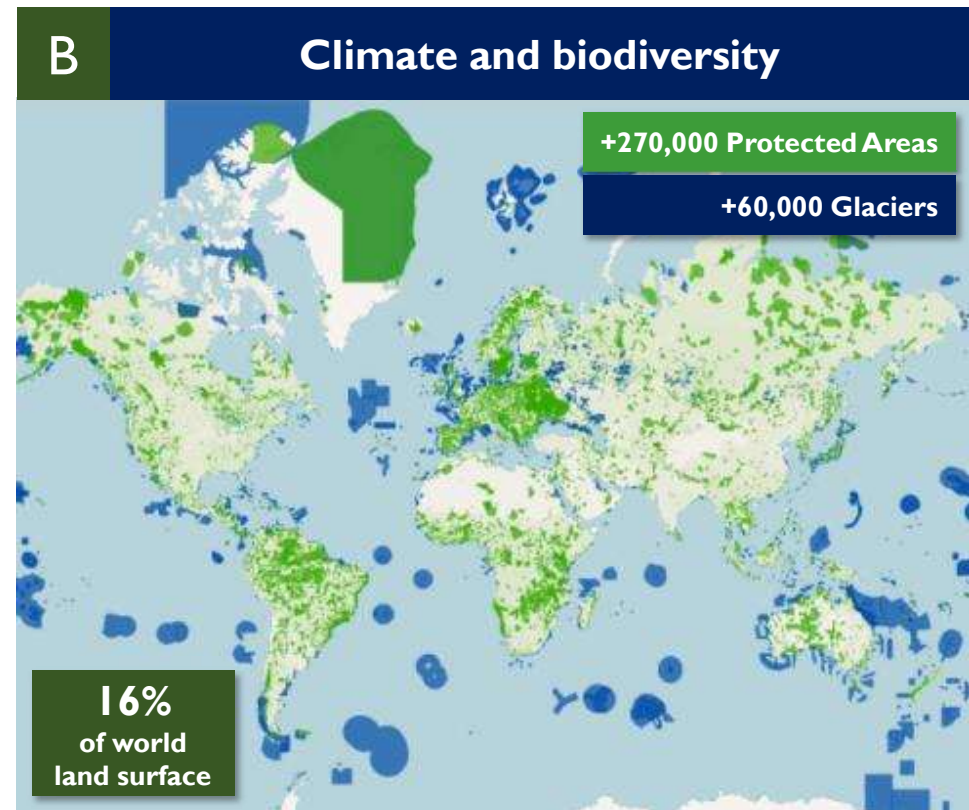**150** Countries → **87%** International Tourist Arrivals

A | **Landscape and topography**

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Source: Based on FAO definition, CIA World Factbook

Reasons to visit *Mountain Destinations*

Mountain destinations around the world leverage the **distinctive climate** suitable for outdoors activities, but also the uniqueness of its **biodiversity** and high level of preservation.

- **Protected Areas** such as National Parks / Nature Reserves or similar are instruments that allow for a **careful management of visitor flows** in sensitive environments that combine **nature preservation** with **tourism development** of the destination

B — Climate and biodiversity

+270,000 Protected Areas

+60,000 Glaciers

16% of world land surface

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Source: World Database on Protected Areas (WDPA) by UNEP-WCMC, and IUCN

Activities when visiting *Mountain Destinations*

Mountain tourism requires an **active engagement** of visitors to perform **location-based activities** that may require a certain degree of **expertise or assistance** (i.e. hiking, climbing, skiing, as well as adventure and adrenaline activities) vs. those that can be **suitable for all audiences** (i.e. nature, cultural and heritage sightseeing).

Their categorization into **'standard'** or **'extreme'** provides a framework to assess market sizes and to measure participation rates.

| C	Leisure and sport activities	
Standard / Soft (universal / for all)	Hiking Cycling Horseback riding Canoeing Wildlife observation Camping Birdwatching	Fishing Gastronomy Agritourism Cultural activities Skiing Touring/sightseeing
Extreme / Hard (experienced)	Trekking Climbing Alpinism Caving Canyoning	Paragliding Jumping Trail running Mountain biking Ski mountaineering
	Open area Free access Self guided	Restricted area Entry pass Guided / accompanied

Mountain Tourism as part of Leisure Tourism

Tourism is globally divided between **Leisure** and **Business** tourism, and within **Leisure** motivation **not all destinations provide a detailed breakdown** of the motivations (to eventually include mountain tourism as a response to be properly monitored).

Leisure motivation (on the 55-60% range of tourists) includes mountain tourism and has a much lower share than coastal tourism that leads the demand but is relevant for destinations with renowned mountain ranges.
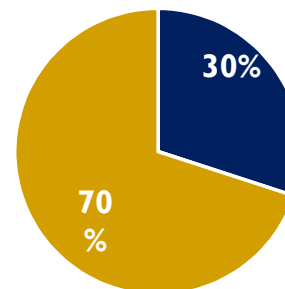
Countries measuring International tourist arrivals by purpose of visit

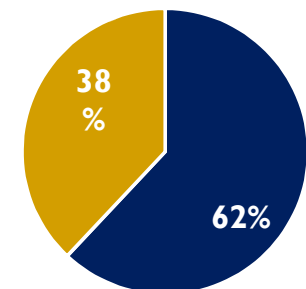25%

75%
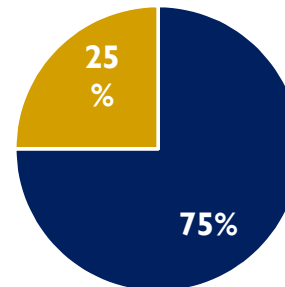
Share of Leisure tourists (International)

42%

58%
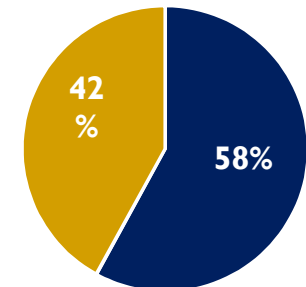
Countries measuring Domestic overnighting tourists by purpose of visit
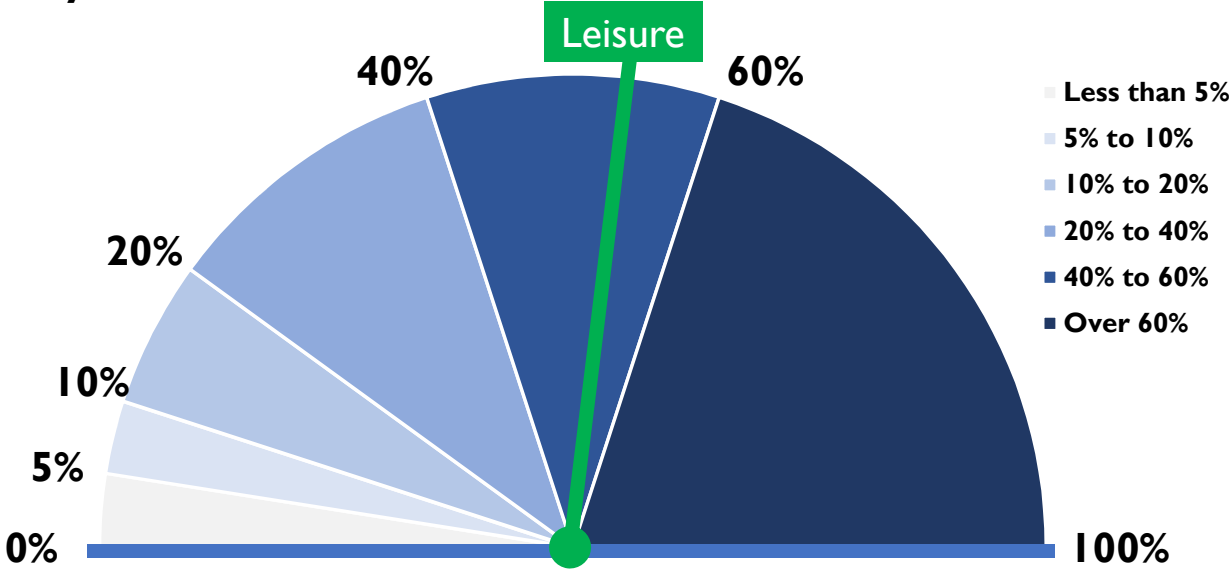
30%

70%

Share of Leisure tourists (Domestic)

38%

62%

Source: Based on UN Tourism Compendium (2021)

Estimating *Mountain Tourism* Share

Inputs	Survey Responses	Visitors to National Parks	Visitors to Ski Resorts	Tourism Statistics (Overnights, Visitors, etc.)	Market Studies for Activities

Market Share Estimates per Country

International Tourist Arrivals

Leisure ✓

Leisure

- 40%
- 60%
- 20%
- 10%
- 5%
- 0%
- 100%

Legend:
- Less than 5%
- 5% to 10%
- 10% to 20%
- 20% to 40%
- 40% to 60%
- Over 60%

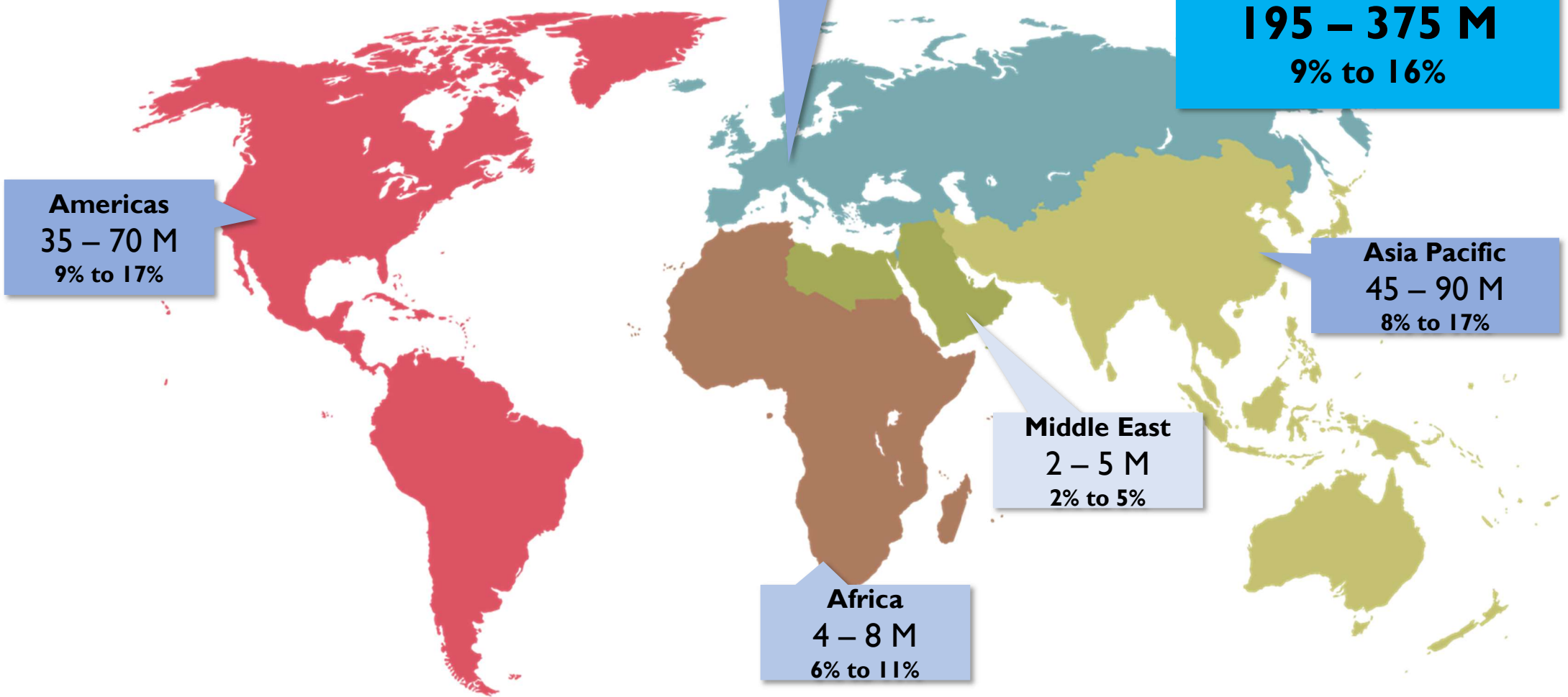*Understanding and Quantifying Mountain Tourism*

Share of *Mountain Tourism* varies across countries

Countries grouped by the estimated share of mountain tourism in international tourist arrivals, 2019

Less than 5%	5% to 10%	10% to 20%	20% to 40%	40% to 60%	More than 60%
• El Salvador	• Italy	• Armenia	• Chile	• **Andorra**	• Austria
• Fiji	• South Africa	• Brazil	• China	• Nicaragua	• Lesotho
• Israel	• Spain	• Bulgaria	• Ethiopia	• Switzerland	• Perú
• Japan	• Uganda	• Czechia	• Nepal		
• Korea, Republic of	• Türkiye	• Ecuador	• Slovenia		
• Mauritius		• Finland	• Venezuela		
• Montenegro		• Romania			
• Timor-Leste					

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Source: Desk research & Survey to UN Tourism members

Estimated share of mountain tourism in international tourist arrivals by region (2019 data)

Europe
112 – 205 M
9% to 17%

Estimated share of mountain tourism in international tourist arrivals
195 – 375 M
9% to 16%

Americas
35 – 70 M
9% to 17%

Asia Pacific
45 – 90 M
8% to 17%

Middle East
2 – 5 M
2% to 5%

Africa
4 – 8 M
6% to 11%

Source: UNWTO-FAO (2023), Understanding and Quantifying Mountain Tourism

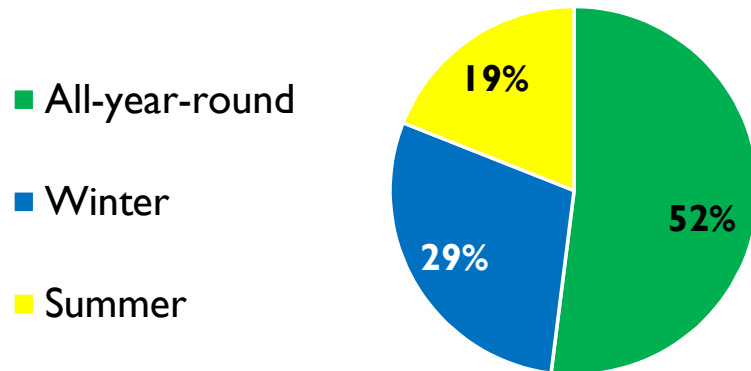# UN Tourism survey to Members

- *Key Results*

Mountains are *all-year-round destinations* targeting both *international* and *domestic* tourists

Online survey launched to UN Tourism's membership. Responses from 46 countries, accounting for 40% of International Tourist Arrivals

Africa	Americas	Asia Pacific	Europe	Middle East
6	10	9	19	2

What are the peak season(s) for mountain tourism in your country?
(single choice)

- All-year-round
- Winter
- Summer

52%
29%
19%

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Are mountain tourists domestic and/or international?
(single choice)

- Both Domestic and International
- Domestic
- International

60%
30%
10%

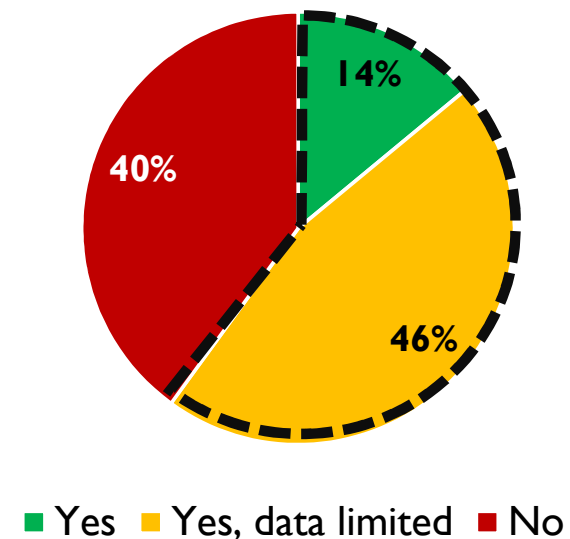*Source: Survey to UN Tourism members*
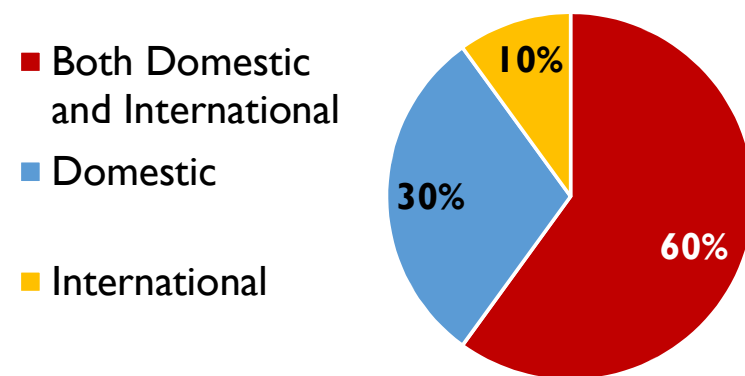
Most survey respondents are mountain destinations and underline the limitation or unavailability of data

What is the current stage of mountain tourism development in your country?
(single choice)

Country fits within the definition of mountain tourism **91%**

- Already an established destination
- An emerging destination
- Will draw attention in the near future
- Little room for development

41%

41%

7%

11%
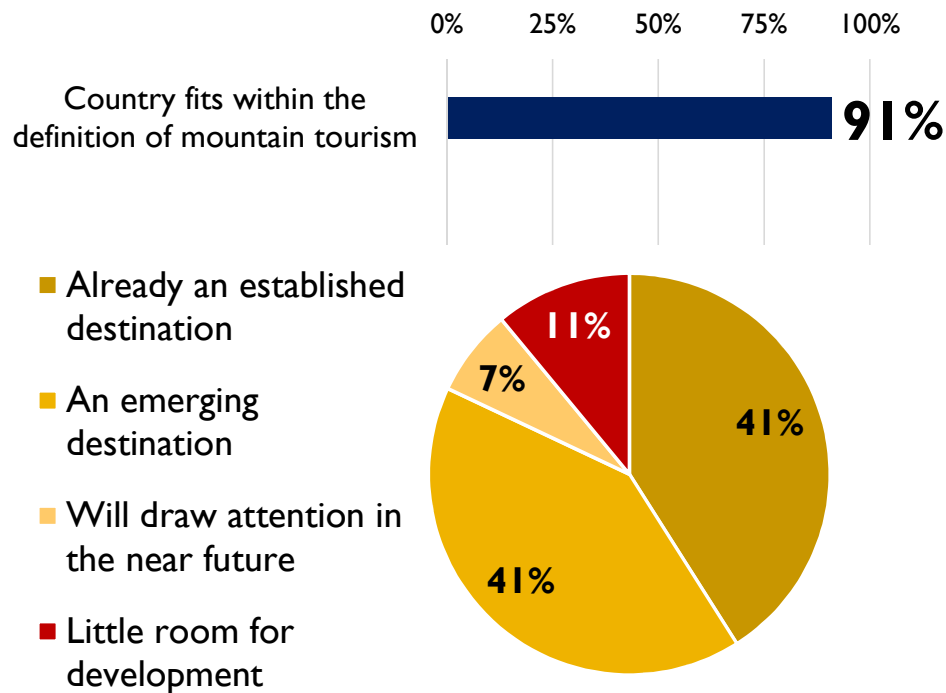
Does your country count the number of visitors to mountain destinations for tourism purposes?

14%

46%

40%

■ Yes ■ Yes, data limited ■ No

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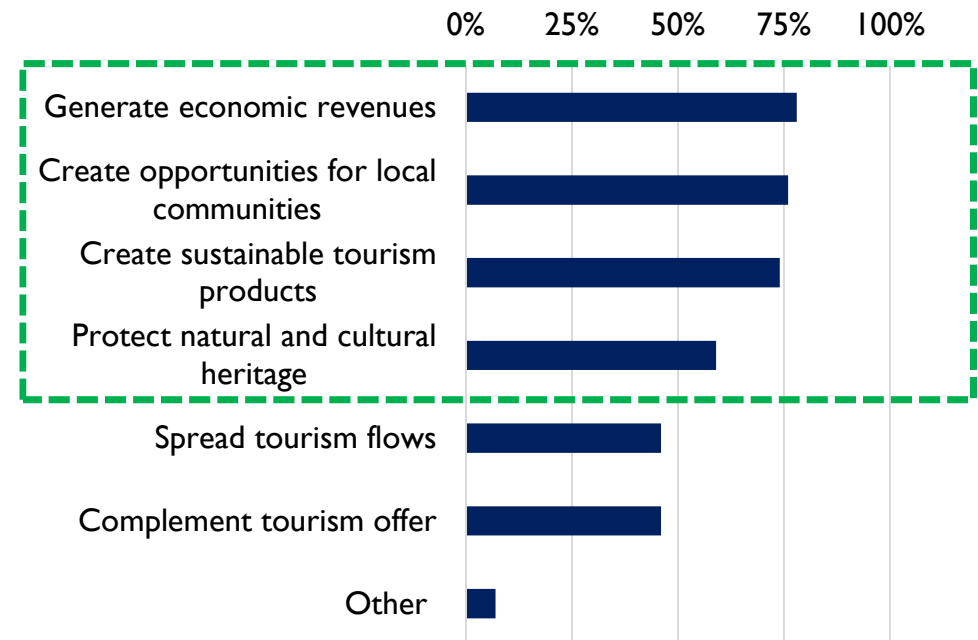*Source: Survey to UN Tourism members*

Economic revenue, opportunities for local communities and sustainable products main motivations for *mountain tourism*

What activity related with mountain tourism is predominant in your country?
(multiple choice)

Activity	Percentage
Walking and Hiking	~92%
Nature Tourism	~82%
Rural Tourism	~57%
Winter Sports	~50%
Cultural Heritage	~38%
Spiritual Tourism	~23%
Other	~13%

Other include Birdwatching, adventure, climbing, mountaineering, gastronomy

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What are the main purposes of mountain tourism in your destinations?
(multiple choice)

Purpose	Percentage
Generate economic revenues	~80%
Create opportunities for local communities	~77%
Create sustainable tourism products	~75%
Protect natural and cultural heritage	~60%
Spread tourism flows	~48%
Complement tourism offer	~48%
Other	~7%

Other include Address seasonality and structural changes

Source: Survey to UN Tourism members

Adequate infrastructure, sustainability & product development are main challenges for *mountain tourism*

What are the main challenges your country faces when developing & promoting mountain tourism?
(multiple choice)
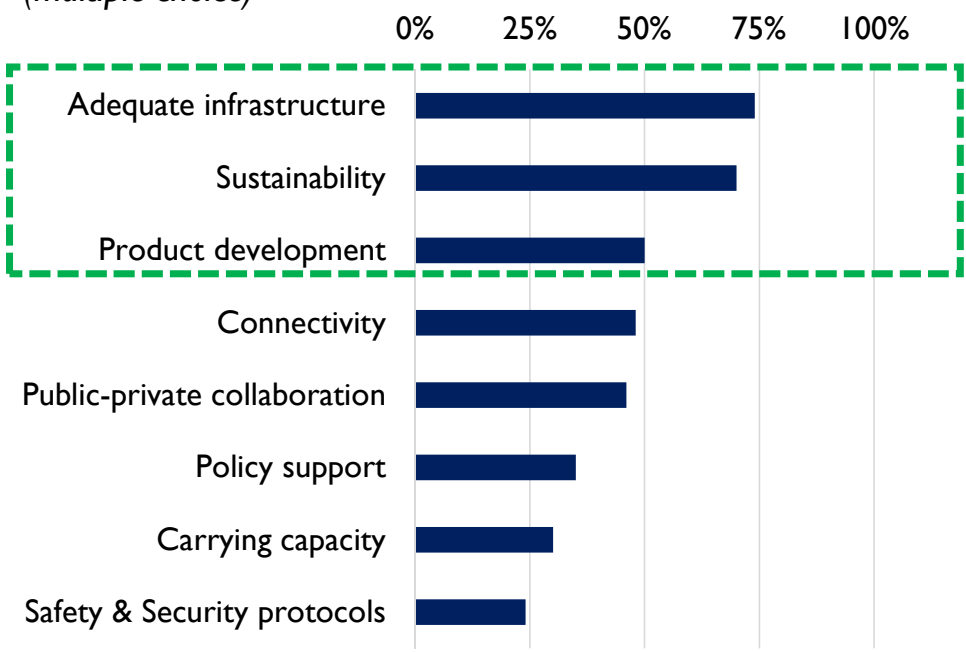
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Source: Survey to UN Tourism members

Key Conclusions from Survey

- Better measurement is needed to manage better

- Measurement of tourism flows is key to spread tourism flows, share economic benefits and ensure preservation of cultural and natural heritage

- Create tourism products related to gastronomy, nature, wellness or rural tourism

- Promote domestic tourism in mountains

- Provide experiences that cater for visitors' needs and adapt to ever-changing consumer trends

- Huge potential in emerging mountain destinations and also in more established ones

*Source: Survey to UN Tourism members*

The Way Forward

- *Case Studies*

Using mobile positioning data to enhance measurement:
- **Instituto Nacional de Estadística – Spain**

Measurement of Tourists from the position of cell phones (Instituto Nacional de Estadística – Spain)

New experimental data since July 2019 to track tourists (International & Domestic) allowing to quantify tourists in mountain municipalities.
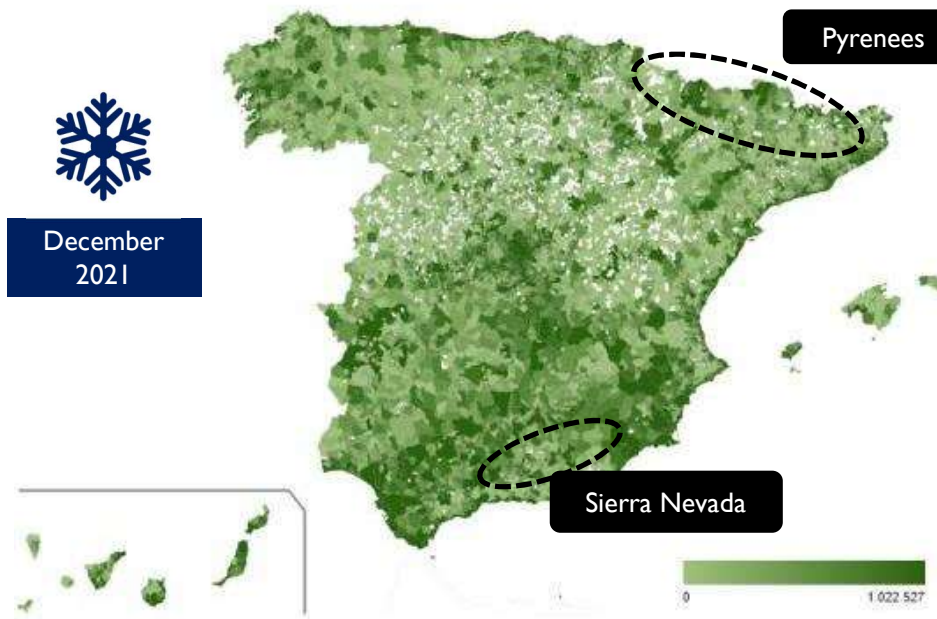
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Source: https://www.ine.es/experimental/turismo_moviles/experimental_turismo_moviles.htm

Measuring beyond volume: Sustainable Tourism Indicators
- **INSTO and South Tyrol Observatory**

The **UN Tourism International Network of Sustainable Tourism Observatories (INSTO)** is a network of tourism observatories monitoring the economic, environmental, and social impact of tourism at the destination level.

Case study: South Tyrol (Italy)

- The **South Tyrolean Observatory** began its activities in early 2018 plays an important role in fostering the management and monitoring of sustainable tourism development in the region under 3 main areas (**Economy, Society and Environment**). South Tyrol is known for its mountain areas and natural landscapes covering 90% of the territory.

Example of Sustainable Tourism Indicators

Seasonality   Employment   Economic Benefits

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Italy

eurac research

The Sustainable Tourism Observatory
of South Tyrol (STOST)

Annual Progress Report – 2021 edition

Source: https://sustainabletourism.eurac.edu/

Recommendations

- **Advance data** and **evidence-based** tourism **policies** and strategies in mountain areas to maximize the impact of tourism on employment and ensure social sustainability

- **Invest in statistical systems** in line with the *International Recommendations of Tourism Statistics*

- Explore the use of **mobile positioning data** to improve measurement

- Enhance **market intelligence** to attract new segments and better understand consumer trends, and embrace the **digitalization** of the sector

- Strengthen **public-private-community partnerships to promote** adequate measurement and monitoring

- To identify the most important mountain destinations and support the **creation of specific mountain tourism observatories**

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THANK YOU !
MOLTES GRÀCIES !

DOWNLOAD REPORT

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