Item 3 of the provisional agenda: Report of the Secretary-General

Item 3.5

REPORT ON THE SURVEY ON PRIORITY AREAS OF THE PROGRAMME OF WORK FOR 2014-2015

Note by the Secretary-General

The Secretary-General submits to the Members of the Commission information on the Report on the survey on priority areas of the Programme of Work for 2014-2015.
1. Introduction

1.1. Background
In September 2012, a Survey on Member States’ priorities was launched by the UNWTO Secretariat in order to prepare the Organization’s General Programme of Work and Regular Budget 2014-2015.

This exercise has been conducted in the framework of the White Paper (WP1), which sets the mid-term global strategic issues, and in continuity with the Programme and Budget 2012-2013. A questionnaire has been made available online at: http://www2.unwto.org/en/webform/survey-member-states-priorities-2014-2015

This questionnaire is built around the two main strategic objectives of the Organization: Sustainability/Ethics and Competitiveness/Quality. It also raises concerns of different nature for Members (e.g. focus on specific tourism destinations, industries or segments) as well as the question of resource mobilization in order for the UNWTO Secretariat to better link Members’ needs and existing funding mechanisms.

The present report follows the structure of the survey and presents its key results.

1.2. Level of response

Considering the relative complexity of the questionnaire, the level of replies received (60%, i.e. 95 Full Members and one Associate Member2) is considered to be satisfactory, with clear disparities among regions, as shown in the following graph.

The full list of respondents is available in Annex I.

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1 White Paper: A/19/11
2 For information, for the previous biennium, level of replies was 50% for a survey having a comparable degree of complexity.
2. Sustainability and Ethics

In this part of the survey, Members were requested the following:

1. To rate, from 1 to 5 (5 being the highest), the following four areas of work:
   a. Green growth and tourism
   b. Tourism mitigation of, and adaptation to, climate change
   c. Sustainable Development Goals
   d. Ethical and Social Dimensions of Tourism
2. To specify, for each of the previous areas, the most effective means of delivery, and
3. To indicate any other area(s) of activity they consider important in relation with sustainability and ethics

2.1. Ranking areas of activity

Results are shown in the following graph:

At a global level, Members have given first priority to UNWTO engagement in the UN framework to work further on the formulation of the Millennium Development Goals (MDGs PLUS) agenda, with the creation of the Sustainable Development Goals for all nations.

This is in line with the second priority expressed by Members, Green growth and Tourism, aiming at helping the tourism sector in being more sustainable in its activities.

Ethical and social dimensions of tourism come third. It includes a) economic empowerment of women in tourism, b) accessibility in tourism, c) protection of children in tourism and d) corporate social responsibility in tourism. For regional results, see Annex II.
2.2. Preferred means of delivery

Results are shown in the following graph:

In relation with sustainability issues, Members have indicated their preferences for three main means of delivery:

- Guidelines/Standards
- Exchange of practices
- Capacity-building activities

These preferred means are to be compared to those in relation with Competitiveness (see 3.2). For regional results, see Annex III.

2.3. Suggestions by Members

Eleven Members suggested other areas of work or made comments in relation with tourism and sustainability. These suggestions and comments can be summarised as follows:

- Support to/guidance for the elaboration of tourism national strategy is required
- UNWTO Programme of work should lead to the development of tourism that benefit to local communities
- Social and environmental dimensions of tourism should always be linked with its economic side
- Sustainability of tourism is to be interrelated with resource mobilization
- Mentions were made of specific connexions between tourism and peace, Gross National Happiness, protection of natural and cultural environments, etc.

3. Competitiveness and Quality

In this part, similarly, Members were requested the following:

1. To rate, from 1 to 5 (5 being the highest), the following areas of work:
   a. Domestic Tourism
   b. Employment in tourism
   c. Protection of tourists/consumers and tourism enterprises
   d. Statistics
   e. Market Trends
f. Travel facilitation
g. Investment
h. Taxation
i. Quality
j. Human resource development and education
k. Risk and crisis management

2. To specify, for each of the previous areas, the most effective means of delivery, and

3. To indicate any other area(s) of activity they consider important in relation with competitiveness and quality

3.1. Ranking areas of activity

Results are shown in the following graph:

For regional results, see Annex IV.
3.2. Preferred means of delivery

Results are shown in the following graph:

In relation with competitiveness issues, Members have indicated their preferences for three main means of delivery:

- Guidelines/Standards
- Exchange of practices
- Research/Publication

If we add these results with those obtained in relation with sustainability issues, we note that the availability of guidelines/standards and the exchange of practices constitute the primary needs from Members in terms of delivery.

For regional results, see Annex V.

3.3. Suggestions by Members

Thirteen Members suggested other areas of work or made comments in relation with tourism and competitiveness. These suggestions and comments can be summarised as follows:

- UNWTO should explore standards for, and certification of, specialized product offer, as well as critical points in taxation policy for small entrepreneurs.
- Working conditions in tourism. Usually employment in tourism is seasonal and less paid. Some jobs are not very innovative and attractive. Therefore it is difficult to find well educated and highly motivated young people willing to work in tourism offering a high level of service quality. How can tourism policy assist the tourism industry to cope with this situation?
- A crucial area is the physical accessibility of destinations: connectivity, transport and mobility.
- Other areas of importance are: Destination branding; Technology: potential(s) offered; e-marketing, social media; and Innovation.
- It seems essential to link tourism with other sectors such as agriculture and manufacturing in order to maximize economic positive impacts at destination.
Tourism investment is a vital element which needs to be promoted in line with the national strategic plan or national tourism policy. Generally, it would be interesting to examine specific experiences and/or planning documents (Tourism national strategies) related to all areas of work in some countries.

4. Focus on tourism destinations, segments or industries, and regional cooperation

4.1. Destinations
Tourism development has to be adapted to the specificities of tourism destinations and Members were asked to rank (1 to 5) each type of destination according to the importance they have. Results are as follows:

In addition to the above ranking, eight members made some suggestions and comments regarding the relevance of some types of destination. Two specific sub-types of destinations were highlighted: Desert areas and islands.

Other comments refer to:

- The importance of the right combination between destination type and product diversification in order to spread tourism benefits geographically all around each country, particularly in isolated and poorest areas.
- The concept of “city break” under urban destinations.
- The relevance of “accessibility for all” in all types of destination and the necessity to provide handicapped or elderly people with equal rights to travel.

For regional results, see Annex VI.
4.2. Activities for tourists at destination / Segments

A similar question was made regarding the importance of tourism activities at destination. Results are presented in the following graph:

In addition to the above ranking, fourteen members made some suggestions and comments regarding the relevance of some specific tourism activities. Many comments refer to the following segments, by decreasing order of importance: 1) cruising, 2) beach and sun, including diving and snorkelling, 3) gastronomy and oenology, 4) training and education, notably in relation with language, 5) archaeological, 6) specific sport activities, such as golf, 7) specific recreational activities, such as gambling, and 8) community-based products.

Here again, the connection between type of destination and product development is highlighted as a crucial element for drafting national tourism strategies.

For regional results, see Annex VII.

4.3. Tourism policy issues or pillars

With a broader perspective, Members were requested to analyse and rank (1 to 5) the following tourism pillar according to the importance they have in their tourism policy:

- Transport (air, road, rail and water)
- Accommodation, food and beverage
- Activities for tourists at destination / Segments (see list above)
- Land planning / Management of public space and heritage
- Marketing, promotion, innovation and sales practices
Results are as follows:

In addition to the above ranking, fifteen members made some suggestions and comments regarding tourism policy issues or pillars:

- Some issues could be highlighted, that cut across all or some pillars:
  - Improving human resource development
  - Developing high standards of quality and sustainability for a better resilience of the sector as a whole
  - Ensuring connectivity
  - Building product diversification according to types of destination and positioning
  - Ensuring a broad participation of all tourism stakeholders and local population in building tourism policies
  - Encouraging investment, mainly in research as well as in ICT and energy infrastructure
  - Developing indicators and statistics in order to monitor progress
  - Keeping innovating

- UNWTO should serve to improve Members’ tourism policy settings, that is, how governments can influence and support their tourism industries.

- Some Members mentioned that some pillars are not under the control of their national tourism administration and that an integrated approach (i.e. with other ministries or administrations) is needed in any tourism strategy.
4.4. Regional and sub-regional cooperation

Finally, Members were asked to indicate their level of interest (1 to 5) regarding possible cooperation in tourism initiatives with countries of their region or sub-region. Summary results are as follows:

![Importance of regional cooperation in tourism policy issues]

Some Members gave indications of areas to be dealt with in the framework of a regional cooperation:

- Investing and supporting the use of IT in improving the entry requirements/controls
- Establishing joined promotional activities within the region, promoting the region as a multi-destination
- Developing common projects (trans-national), gaining knowledge through best practices and benchmarking.
- Organizing shared institutional training and capacity-building
- Cooperating in research and sharing information

This information will be of great help to Regional Programmes of the Secretariat in order to compose and propose specific regional or sub-regional initiatives to UNWTO Members.

5. Resource mobilization

In this part of the survey, Members were requested the following:

1. To indicate their overall eligibility as recipients of the Official Development Assistance (ODA);
2. To specify whether tourism is mentioned in any of the relevant country development strategies:
   a. UN Development Assistance Framework (UNDAF) Report
   b. Common Country Action/Assessment (CCA) Plan
   d. Diagnostic Trade Integration Study (DTIS)
   e. The Millennium Development Goals (MDGs) Report
   Or any other, also to relate if there is not the possibility of providing this information
3. To relate if tourism benefitted from any support provided from the European Union in the 2007-2013 Programming Cycle.
4. To specify the EU fund/instrument from which support was received, when applicable. The results are as follow:

- Over 60% of Members stated recognized ODA-eligibility. This finding reinforces further the need to intensify resource mobilization activities and coordinate planning, reflecting the potential of UNWTO (as an ODA-eligible organization on bilateral basis since 2011) to join hands with the ODA-eligible Members in identifying funding sources to respond to country’s development needs through ODA accountable financing mechanism.

- Tourism is mentioned in a vast majority of documents relevant to defining the national development strategies, with the prevalence of tourism mention as a sector of significant importance in documents relating to poverty reduction strategies and the implementation of MDGs. This specifically being the case for many of Members falling under the category of developing countries, similarly across regions. Recognitions given to tourism as a tool for development need to be investigated and further supported to ensure its inclusion in national development strategies, as well as global development agenda.

- 1 out of 3 Members reported tourism as benefitting on any support from the European Union, as a major development partner/donor, during the EU Programming Cycle 2007-2013. Meanwhile, 2 out of 3 Members (vastly developing countries) conveyed none benefit to tourism from this source, or were not able to provide this information. There should be a strong focus on improving the understanding of tourism assistance potential by EU Delegations in-country, as well as strengthening the capacity of Tourism Ministries in securing support for tourism through EU instruments.
Annex I: List of respondent Members

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Annex II: Sustainability issues, ranking areas of activity by region
Annex III: Sustainability issues, preferred means of delivery by region

- **Sustainability - Preferred means of delivery Africa**
  - Publication: 61%
  - Guideline: 68%
  - Capacity-building: 75%
  - Conference: 64%
  - Exchange of practices: 61%
  - TC project/mission: 61%

- **Sustainability - Preferred means of delivery Americas**
  - Publication: 35%
  - Guideline: 56%
  - Capacity-building: 56%
  - Conference: 42%
  - Exchange of practices: 50%
  - TC project/mission: 19%

- **Sustainability - Preferred means of delivery Asia and the Pacific**
  - Publication: 44%
  - Guideline: 64%
  - Capacity-building: 55%
  - Conference: 63%
  - Exchange of practices: 75%
  - TC project/mission: 55%

- **Sustainability - Preferred means of delivery Europe**
  - Publication: 46%
  - Guideline: 64%
  - Capacity-building: 38%
  - Conference: 31%
  - Exchange of practices: 52%
  - TC project/mission: 30%

- **Sustainability - Preferred means of delivery Middle East**
  - Publication: 50%
  - Guideline: 50%
  - Capacity-building: 50%
  - Conference: 50%
  - Exchange of practices: 33%
Annex IV: Competitiveness and Quality, Ranking areas of activity by region
Annex V: Competitiveness and Quality, Preferred means of delivery by region

Competitiveness - Preferred means of delivery Africa

Competitiveness - Preferred means of delivery America

Competitiveness - Preferred means of delivery Asia and the Pacific

Competitiveness - Preferred means of delivery Europe

Competitiveness - Preferred means of delivery Middle East
Annex VI: Importance of type of destinations in tourism policy by region

- **Africas**: Mountain areas - 3.0, Urban areas - 3.7, Coastal areas - 4.3, Rural and natural areas - 4.5
- **Americas**: Mountain areas - 3.9, Urban areas - 3.9, Coastal areas - 3.6, Rural and natural areas - 4.5
- **Asia and the Pacific**: Mountain areas - 4.7, Urban areas - 3.6, Coastal areas - 3.9, Rural and natural areas - 3.9
- **Europe**: Mountain areas - 3.6, Urban areas - 3.9, Coastal areas - 3.9, Rural and natural areas - 4.2
- **Middle East**: Mountain areas - 3.3, Urban areas - 4.3, Coastal areas - 3.7, Rural and natural areas - 4.8
Annex VII: Importance of activities for tourists at destinations, by region

- **Africa**
  - Religion: 2.6
  - Shopping: 3.0
  - Health and wellness: 2.8
  - Sports: 3.5
  - Meetings (MICE): 4.0
  - Recreational: 3.6
  - Nature, adventure: 4.1
  - Culture: 4.6

- **America**
  - Religion: 3.0
  - Shopping: 3.4
  - Health and wellness: 3.3
  - Sports: 3.8
  - Meetings (MICE): 4.5
  - Recreational: 4.6
  - Nature, adventure: 4.7
  - Culture: 4.2

- **Asia and the Pacific**
  - Religion: 3.5
  - Shopping: 3.3
  - Health and wellness: 3.5
  - Sports: 3.5
  - Meetings (MICE): 3.5
  - Recreational: 3.5
  - Nature, adventure: 4.2
  - Culture: 4.4

- **Middle East**
  - Religion: 3.5
  - Shopping: 3.5
  - Health and wellness: 3.8
  - Sports: 3.3
  - Meetings (MICE): 3.5
  - Recreational: 4.3
  - Nature, adventure: 4.2
  - Culture: 4.5
Annex VIII: Importance of tourism policy issues or pillars, by region

Africa - Importance of tourism policy issues or pillars (comparing with world)

- Activities for tourists at destination / Segments: 4.2
- Land planning / Management of public space and heritage: 4.8
- Accommodation, food and beverage: 4.2
- Transport (air, road, rail and water): 4.3
- Marketing, promotion and sales: 4.2

Americas - Importance of tourism policy issues or pillars (comparing with world)

- Activities for tourists at destination / Segments: 4.2
- Land planning / Management of public space and heritage: 3.8
- Accommodation, food and beverage: 4.4
- Transport (air, road, rail and water): 4.6
- Marketing, promotion and sales: 4.6

Asia and the Pacific - Importance of tourism policy issues or pillars (comparing with world)

- Activities for tourists at destination / Segments: 4.9
- Land planning / Management of public space and heritage: 4.0
- Accommodation, food and beverage: 4.5
- Transport (air, road, rail and water): 4.4
- Marketing, promotion and sales: 4.9

Middle East - Importance of tourism policy issues or pillars (comparing with world)

- Activities for tourists at destination / Segments: 5.7
- Land planning / Management of public space and heritage: 4.5
- Accommodation, food and beverage: 3.7
- Transport (air, road, rail and water): 3.8
- Marketing, promotion and sales: 5.0

Europe - Importance of tourism policy issues or pillars (comparing with world)

- Activities for tourists at destination / Segments: 4.2
- Land planning / Management of public space and heritage: 3.6
- Accommodation, food and beverage: 4.3
- Transport (air, road, rail and water): 3.9
- Marketing, promotion and sales: 4.7