7. Draft general programme of work for the period 2016 - 2017:
Report on the survey on priority areas of the programme

Table of Contents

1. Introduction .................................................................................................................. 2
   1.1. Background ........................................................................................................... 2
   1.2. Level of response ................................................................................................. 2
       ▪ Full and Associate Members ............................................................................... 2
       ▪ Affiliate Members .............................................................................................. 3
2. Sustainability and Ethics ............................................................................................... 3
   2.1. Full and Associate Members’ priorities ............................................................... 3
   2.2. Suggestions of additional areas of work .............................................................. 4
   2.3. Affiliate Members’ priorities ............................................................................... 5
3. Competitiveness and Quality ....................................................................................... 5
   3.1. Full and Associate Members’ priorities ............................................................... 5
   3.2. Suggestions of additional areas of work .............................................................. 6
   3.3. Affiliate Members’ priorities ............................................................................... 7
Annexes ............................................................................................................................. 9
   Annex I: List of Full and Associate Members who responded the survey .................. 9
   Annex II: Sustainability issues, ranking areas of activity by region ......................... 10
   Annex III: Competitiveness and Quality, Ranking areas of activity by region .......... 12
1. Introduction

1.1. Background
From October to December 2014, a survey on Members’ priorities was conducted by the UNWTO Secretariat in order to prepare the Organization’s General Programme of Work and Regular Budget for 2016-2017. Two separate questionnaires were made available online, one for Full and Associate Members and one for Affiliate Members, the latter including minor differences in order to adapt it to their membership.

The survey was built around the two main strategic objectives of the Organization: Sustainability/Ethics and Competitiveness/Quality. It also raised two questions that will be analysed separately by the Secretariat regarding resource mobilization and cooperation.

This report follows the structure of the survey and presents its key results, first for the Full and Associate Members, then for the Affiliate Members.

1.2. Level of response

- Full and Associate Members
Considering the relative complexity of the questionnaire, the level of replies received (64%, i.e., 103 Full Members and three Associate Members) is considered to be representative of this membership, with some disparities among regions as shown in the following graph.

The list of Full and Associate Members who responded to the survey is available in Annex I.

1 For information, for the previous biennium 2014-2015, the level of replies was 60%.
Respondents were also requested to indicate their names and titles. The following graph shows the distribution of the highest officials involved in responding to the survey. Nearly 70% were of Director level or above:

**Highest official involved in responding the survey**

- **Affiliate Members**
  45 Affiliate Members answered the survey (around 25%).

2. **Sustainability and Ethics**

2.1. **Full and Associate Members’ priorities**

In the survey, Full and Associate Members were requested the following in relation with sustainability and ethics:

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism sustainability and ethics:
  a. Biodiversity
  b. Climate change
  c. Energy and water
  d. Culture
  e. Poverty reduction
  f. Gender issues
  g. Traveller’s and corporate social responsibility
h. Consumer protection
i. Accessible tourism
j. Safety, security and peace

- To formulate specific comments on any of the above areas of work, and to indicate any other area of work to consider.

By cumulating all the rankings established by Members, we can establish an overall ranking of areas of work linked with sustainability and ethics. The results are shown in the following graph:

**Sustainability: Ranking of priority areas for Full and Associate Members**

![Graph showing ranking areas of work for sustainability and ethics]

For regional results, see Annex II.

Comments received regarding the different sustainability areas of work will be used by the Secretariat when preparing specific activities in the coming biennium.

### 2.2. Suggestions of additional areas of work

In relation with sustainability and ethics, Members made the following additional recommendations to the Secretariat:

- To work on sustainable development of tourism (SDT) applied to specific segments (e.g., coastal or urban tourism)
- To consider fair tourism and community development
- To brainstorm about financing models for sustainable tourism and incentive mechanisms for investors.
- To consider capacity-building activities for tourism boards in order for them to respond to new tourism demands and to support governments in tourism education and training for youth and local people.
- To keep the standardization work, notably in relation with green standards for the tourism industry
- To link the work done in market research to sustainability issues
- To facilitate horizontal and vertical cooperation within the sector on sustainability issues: PPP and transnational cooperation (e.g., EU and UNWTO)
- To support Members in linking land-use planning and sustainable tourism
- To keep working on tools and indicators aiming at monitoring sustainability

2.3. Affiliate Members’ priorities

In the survey to Affiliate Members, the following question was raised: According to your organization’s needs, please establish a hierarchy of relevance among the following areas of work:

- Energy and water
- Culture
- Gender issue
- Responsible traveller and Corporate Social Responsibility (CSR)
- Consumer protection
- Accessible tourism
- Public-private sector collaboration
- Peace and security
- International cooperation for development

The results obtained are shown in the following graph:

Sustainability: Ranking of priority areas for Affiliate Members

3. Competitiveness and Quality

3.1. Full and Associate Members’ priorities

In this part, similarly, Full and Associate Members were requested the following:

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism Competitiveness and Quality:
a. Travel facilitation  
b. Taxation/investment  
c. Connectivity  
d. Marketing/branding  
e. Destination quality management  
f. Statistics  
g. Market trends  
h. Domestic tourism  
i. Employment  
j. Human resource development

- To formulate specific comments on any of the above areas of work, and to indicate any other area of work.

By cumulating all the rankings established by Members, we can establish a classification overall ranking for areas of work linked with competitiveness and quality. Results are shown in the following graph:

**Competitiveness: Ranking of priority areas for Full and Associate Members**

![Bar chart showing the ranking of areas of work](chart.png)

For regional results, see Annex III.

Comments received regarding the different competitiveness areas of work will be used by the Secretariat when preparing specific activities in the coming biennium.

### 3.2. Suggestions of additional areas of work

In relation with competitiveness, Members made the following additional recommendations to the Secretariat:

- To reinforce tourism governance through a) better cooperation among public bodies and between public and private sectors, b) better regional cooperation and c) better and deeper political and institutional cooperation within countries (between line ministries)
- To focus on development through tourism, including the issue of resource mobilization
To partner for innovation and new technologies in tourism product development, with a focus on SMEs.
To strengthen institutional capacity through tourism education and build community capacity through training
To advocate for a fairer travel advisory system
To facilitate online exchange of experiences (recommended practices) and knowledge transfer
To continue the work on seasonality, i.e., products for low season and new marketing tools, notably in relation with social media

3.3. Affiliate Members’ priorities

In the survey to Affiliate Members, the following question was raised: According to your organization’s needs, please establish a hierarchy of relevance among the following areas of work:
- Travel facilitation
- Taxation/investment
- Connectivity
- Marketing/branding
- Product development
- Destination quality management
- Statistics
- Market trends
- Domestic tourism
- City Tourism
- Seasonality
- Human resource development
- Governance
- Employment

Results obtained are shown in the following graph:

**Competitiveness: Ranking of priority areas for Affiliate Members**
Competitiveness: Ranking of priority areas for Affiliate Members
Annex I: List of Full and Associate Members that responded to the survey

<table>
<thead>
<tr>
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<th>Europe</th>
<th>Middle East</th>
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<td>69. Greece</td>
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</tbody>
</table>
Europe: Ranking areas of work for sustainability and ethics

Middle East: Ranking areas of work for sustainability and ethics
Annex III: Competitiveness and Quality, ranking areas of activity by region

Africa: Ranking areas of work of competitiveness and quality

Americas: Ranking areas of work of competitiveness and quality

Asia: Ranking areas of work of competitiveness and quality