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Report of the Regional Director for the Americas Implementation of the Programme of Work in the Americas 2022-2023

Introduction

Since the last meeting of the Regional Commission for the Americas, which took place in Punta del Este, Uruguay, the Secretariat—and in particular this Regional Department—has focused its fields of work on the objectives and programmatic priorities of the Organization:

1. Investing in people: human capital, education and jobs
2. Foster sustainable and green transition: social aspects, culture and environment
3. Boost investments, financing and entrepreneurship
4. Enhance competitiveness and resilience: market intelligence, statistics and product development
5. Scale up innovation and digital transformation

One of the premises that UNWTO has taken into account is the one mentioned in SDG 4, on inclusive, equitable and quality education, proposing targets 4.3 and 4.4, which establish, respectively: "by 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university", and "by 2030, substantially increase the number of youth and adults who relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship".

ECLAC has pointed out that there are eight dynamic sectors of the economy in which it is necessary to invest in order to advance in the three dimensions of sustainable development: sustainable mobility, the digital revolution, the health manufacturing industry, the care economy, renewable energies, the bioeconomy, the circular economy and sustainable tourism.

I. Overview of trends and prospects for international tourism in the Region

1. International tourist arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter in 2019) driven by strong results in Europe and the Middle East, while in 2022 the level of recovery was 66% overall.
2. The Middle East recorded the best performance (+15%) and is the first region in the world to recover pre-pandemic figures in a full quarter. Europe reached 90% of pre-pandemic levels in Q1 2023, supported by solid intra-regional demand.
3. Africa and the Americas reached around 85% of 2019 levels in the first three months of 2023, while arrivals to Asia and the Pacific rose to 54% of pre-pandemic levels.
4. Several destinations reported extraordinary growth in arrivals in the first quarter of 2023 compared to the first quarter of 2019, including Sint Maarten (+51%); other destinations that enjoyed double-digit growth this quarter were El Salvador (+26%), Colombia (+18%), U.S. Virgin Islands (+17%), Guatemala (+14%), Honduras (+13%) and the Dominican Republic (+11%). Central America (98%) and the Caribbean (94%) came very close to their first quarter 2019 levels.
5. International tourism receipts recovered the USD 1 trillion mark in 2022, growing by 50% in real terms compared to 2021 and reaching 64% of pre-pandemic levels. Revenues exceeded pre-pandemic levels in Mexico in the first quarter of 2023 (+20%).
6. Solid results are expected in the upcoming Northern Hemisphere summer season supported by solid pent-up demand, the sustained recovery of air connectivity, and the recent reopening of China and other major Asian markets and destinations.
7. The UNWTO Group of Experts survey indicates that almost 70% of experts expect better performance in May-August 2023. However, most continue to believe that international tourism will not return to 2019 levels until 2024 or later.
8. In response to the challenging economic environment, tourists are expected to increasingly seek value for money and travel closer to home this year.
9. International tourism is expected to continue its recovery throughout the year supported by strong pent-up demand, sustained recovery in air connectivity, as well as the recent reopening of China and other major Asian markets and destinations.
10. Both international seat capacity and passenger demand recovered around 80% from 2019 levels through February 2023, according to IATA.
11. Looking ahead, most experts continue to believe that international tourism will not return to 2019 levels until 2024 (38%) or 2025 or later (23%). However, this combined share of 61% has declined slightly compared to the January survey (65%) showing increased confidence. It reflects that a growing number of destinations are on track to recover pre-pandemic levels in 2023 or have already done so in 2022. About 28% of respondents expect recovery to happen in 2023.

II. Main challenges and opportunities affecting the tourism sector in the Americas

12. UNWTO is working to mitigate the main challenges facing the region today.
13. Connectivity in the region is presented as one of the main challenges. In order to promote the growth and development of the tourism sector, the Regional Department is working and is in contact with the main airlines in the region and other organizations such as the International Civil Aviation Organization (ICAO), the International Air Transport Association (IATA), the Latin American and Caribbean Air Transport Association (ALTA), etc. to facilitate connectivity in the region, especially in the two most affected subregions, the Caribbean and Central America.

14. Sustainability is one of the main regional priorities and a constant requirement in any bilateral conversation, especially issues related to climate change and biodiversity, two elements of concern mainly in the Caribbean and Latin America.
15. In terms of destination and multi-destination management, the success of UNWTO.QUEST and its methodology should be highlighted, as they provide guidelines for a more integrated governance system for destination management.
16. In the area of product development, gastronomy, wine tourism, rural tourism, etc., are the products with the greatest demand among our Members.
17. In the education and innovation segment, it is important to highlight the impact of the pandemic on the education sector – a silent crisis resulting from the prolonged interruption of face-to-face education in the region and its impact on learning loss – which was not addressed as part of the immediate response to the crisis, thus deepening pre-existing educational inequalities.

II. Political awareness: official visits, diplomatic relations with permanent representations in Madrid and visits by senior officials to UNWTO Headquarters

18. The Regional Department for the Americas recognizes the importance of the institutional support that its Member States require and the need to position tourism on the political agenda of their countries, as an engine of socioeconomic development and thus ensure that the sector receives the necessary government attention and support. That is why it is considered crucial to maintain open and close lines of communication in order to provide not only technical support, but also political backing that facilitates and encourages the support of their own governments for a rapid post-pandemic recovery.
19. To this end, both the Secretary-General and the Regional Director are striving to expand the scope of their efforts to respond to requests for economic and political support, in order to offer effective measures for the recovery of the sector in an inclusive and sustainable manner. With that goal in mind, from June 2022 to date, high-level bilateral meetings have been held with Members of the region as part of these efforts.
20. Missions and official visits in the Americas:
 - **Uruguay:** Meeting with the President of the Republic, Minister of Foreign Affairs and Minister of Tourism in the framework of the celebration of the 67th CAM (May 2022)
 - Official visit to **Paraguay:** Meeting with the President of the Republic, Minister of Tourism and other authorities of the cabinet (July 2022)
 - **Panama:** Launch of the Rural Tourism Startup Competition (October 2022)
 - **Paraguay:** Presentation of the Tourism Master Plan (April 2023)
 - **Dominican Republic:** Meeting with the President of the Republic, Minister of Foreign Affairs and Minister of Tourism in the framework of the 118th Executive Council, (May 2023)
 - **Cuba:** Participation in the G77+China Tourism Ministers' meeting, meeting with the Prime Minister and Minister of Tourism (May 2023)
 - **Panama:** Closing of the Rural Tourism Startup Competition (May 2023)
21. Official visits to UNWTO Headquarters and high-level bilateral meetings:
 - **Mexico:** Official visit of the Ambassador and presentation of credentials as Permanent Representative to UNWTO (September 2022)
 - **Peru:** Official visit to UNWTO Headquarters by the Ambassador of Peru (September 2022)
 - **Ecuador:** Official visit to UNWTO Headquarters by the Minister of Tourism and his delegation (October 2022)
 - **Costa Rica:** Official visit to UNWTO Headquarters (October 2022)
 - **Panama:** Official visit to UNWTO Headquarters by the Ambassador (October 2022)



- **Paraguay:** Official visit to UNWTO Headquarters by the President of the Republic and his delegation (November 2022)
- **Guatemala:** Bilateral meeting with the Minister of Tourism in the framework of the Executive Council (November 2022)
- **SEGIB:** Meeting with its Secretary General (November 2022)
- **SITCA:** Virtual meeting with SITCA member countries (December 2022)
- **Antigua and Barbuda:** Official visit to UNWTO Headquarters by the Ambassador (January 2023)
- **Puerto Rico:** Official visit to UNWTO Headquarters by a delegation led by the Governor and the Minister of Tourism (January 2023)
- **Colombia:** Official visit to UNWTO Headquarters by the Deputy Minister of Tourism (January 2023)
- **Uruguay:** Official visit to UNWTO Headquarters by the Minister of Tourism (January 2023)
- **Venezuela:** Official visit to UNWTO Headquarters by the Minister of Tourism (January 2023)
- **Honduras:** Meeting with Minister of Tourism (January 2023)
- **Chile:** Meeting with the Undersecretary of Tourism (January 2023)
- **Bolivia:** Official visit to UNWTO Headquarters by the Ambassador (January 2023)
- **Venezuela:** Official visit to UNWTO Headquarters by the Ambassador (January 2023)
- **FEDESUD:** Visit to UNWTO Headquarters (January 2023)
- **Promperú:** Meeting with the Executive President (January 2023)
- Meetings with Mexican sub-national States and institutions (January 2023)
- Meetings sub-national States and institutions of **Argentina** (January 2023)
- **Brazil:** Official visit to UNWTO Headquarters by the Minister of Tourism (March 2023)
- **Colombia:** Official visit of the new Ambassador of Colombia (March 2023)
- **Chile:** Virtual meeting with the new Undersecretary of Tourism (May 2023)
- **Peru:** Official visit to UNWTO Headquarters by the new Ambassador of Peru (May 2023)
- **Haiti:** Official visit to UNWTO Headquarters by the Chargé d'affaires (May 2023)
- **Cuba:** Official visit to UNWTO Headquarters by the new Ambassador of Cuba (May 2023)

22. Other face-to-face or virtual events and participations

- Trends for the recovery of Tourism and Cooperative Work from North to South America: Mendoza, **Argentina** – Great Wine Capitals (November 2022) - video
- **Chile:** Rural Tourism Seminar, TMIC virtual participation (Coquimbo, 14 November 2022)
- **CONCANACO:** Rethinking Tourism (28 November 2022)
- **Brazil:** BRAZTOA Sustainability Awards (Mato Grosso do Sul, December 2022) - video
- **Bolivia:** Latin American Congress of the Fairs and Convention Industry (26 May 2023) - video

III. Initiatives, activities, projects and services

(a) Invest in people: human capital, education and jobs

23. In terms of education, UNWTO is pursuing a policy more focused on the different parts that make up the tourism sector in Member States, mainly on young people and women and consequently on the creation of more and better jobs since a highly digitized world requires a modern education system that makes a difference. In this sense, UNWTO leads the new hybrid education model, with a view to expanding training and strengthening skills in tourism, in the conviction that the creation of quality jobs depends on quality education.
24. Following these key guidelines, we have developed and participated in the following activities in the region through the UNWTO Tourism Online Academy Training Programmes:
- (a) Training alliances: 2 doctoral programmes and a module of 4 subjects in a master's degree with the Universidad Anáhuac (Mexico) for 70 students.
 - (b) The UNWTO Tourism Online Academy has also prepared a report on education for the Dominican Republic, which examines nine schools in the country.



- (c) In the same vein, progress is being made in the creation of the International Academies in collaboration with UNWTO in support of Member States' initiatives to provide quality training to their professionals and managers in the tourism sector in different Member States, including the Dominican Republic.
- (d) Continuous training programmes for Member States led by the UNWTO Academy have been delivered and the regular UNWTO Academy courses were also held in Argentina and Mexico in September 2022.

25. Centre Stage project: Tourism has the potential to contribute to UN Sustainable Development Goal 5: achieving gender equality and empowering all women and girls.
26. UNWTO supported 4 national tourism administrations, tourism companies, NGOs and tourism organizations from Costa Rica, the Dominican Republic and Mexico (the fourth was Jordan), in the implementation of a one-year action plan for the empowerment of women. This initiative consisted of strengthening, coordinating and focusing efforts for gender equality in government institutions and tourism businesses as they recover from the pandemic.
27. This initiative was made possible with the support of Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), and UN Women, with the aim of ensuring an inclusive and resilient recovery from the impact of the pandemic, taking into account its disproportionate effect on women working in tourism.
28. The [main results of the Centre Stage project](#) were presented during the World Travel Market.
29. Global Youth Tourism Summit: with the participation of young delegates representing Barbados, Chile and Paraguay (Sorrento, June 2022)
30. UNWTO has also published a new set of guidelines to address the needs of women in the tourism sector. It is a dual publication for the public and private sectors, providing tools to help tourism institutions and enterprises integrate gender considerations into their policies, programmes and strategies and take advantage of the opportunities offered by tourism for women's empowerment.
 - [Gender Mainstreaming Guidelines for the Public Sector in Tourism](#)
 - [Gender-inclusive Strategy for Tourism Businesses](#)

(b) Foster sustainable and green transition: social aspects, culture and environment

i. Culture:

31. The [Compendium of Good Practices in Indigenous Tourism – Regional Focus on the Americas](#) has been developed jointly with the World Indigenous Tourism Alliance (WINTA), with a particular emphasis on the Americas. The main purpose of the report is to set out good practices. However, it also includes a theoretical introduction to different aspects of planning, managing and promoting responsible and sustainable indigenous tourism development
32. Case studies and guidance were collected from several Latin American countries, such as Mexico, Guatemala, Honduras and the Dominican Republic, as well as from non-member states such as the United States of America and Canada.
- ii. Measuring the Sustainability of Tourism (MST) and the International Network of Sustainable Tourism Observatories (INSTO):
33. With the support of the United Nations Statistics Division, UNWTO has launched an initiative to develop a statistical framework for Measuring the Sustainability of Tourism (MST). The objective is



to develop an international statistical framework to measure the role of tourism in sustainable development, taking into account the economic, environmental and social dimensions.

34. From the region, Argentina, Canada, Costa Rica, Chile, the United States, Mexico, Ecuador and Uruguay are part of the Working Group of Experts on MST. Canada, Mexico, and Costa Rica will implement an MST pilot and likewise, Chile has shown interest with the intention of piloting MST by the end of 2023.
35. This standards-based framework can provide further support in terms of credibility, comparability and dissemination of various measurement and monitoring programmes related to sustainable tourism, including the derivation of indicators from the Sustainable Development Goals (SDGs) and the International Network of Sustainable Tourism Observatories (INSTO).
36. Currently in our region we have a total of 11 observatories distributed in 7 countries, (1 in Argentina, 2 in Brazil, 1 in Guatemala, 1 in Colombia, 3 in Mexico, 2 in Canada and 1 in the United States). Soon, in partnership with the IDB, a report will be prepared on the importance of tourism observatories.
37. To date, 16 applications have been received to join INSTO, of which at least 6 are well advanced with the possibility of joining the Network in the course of this year:

Guatemala, Petén; **Colombia**, Cali; **Mexico**, Nayarit; **Mexico**, Querétaro; **Colombia**, Medellín; **Brazil**, Tourism Observatory of São Luís, Maranhão.

38. Expressions of interest and initial conversations:

Argentina, Neuquén; **Argentina**, Chamber of Tourism; **Chile**, Quenuir, Región de los Lagos, Patagonia; **Chile**, Ciudad de Viña del Mar; **Colombia**, Duitcama-Boyaca; **Colombia**, Barranquilla; **Cuba**, Grupo Cubanacan; **Ecuador**, **Honduras**, Tungurahua and **USA**, Utah, Summit Region, Park City.

iii. One Planet Initiative

39. The One Planet Sustainable Tourism Programme, guided by the Global Strategy for Sustainable Consumption and Production 2023-2030, focuses on several key areas, including resource efficiency, climate change, biodiversity conservation, community engagement and cultural preservation. UNWTO, as co-lead of the One Planet Sustainable Tourism Programme for the period 2023-2024, focuses on three main areas of intervention: accelerating climate action in tourism through the Glasgow Declaration on Climate Action in Tourism, which (as of May 2023) has more than 450 signatories from 32 countries, including 9 non-members; building a circular economy of plastics in tourism through the [Global Tourism Plastics Initiative](#) and the transformation of food value chains in tourism.
40. **Glasgow Declaration:** An initiative where Panama is a signatory and Costa Rica is working to join in order to commit to halving emissions by 2030 and reaching the goal of zero emissions by 2050.
41. **Global Tourism Plastics Initiative:** In order to tackle the root causes of plastic pollution, and thus lead by example the change towards the circular economy of plastics. Colombia and Costa Rica are working to join this initiative and would be the first States to be signatories.

(c) Boost investments, financing and entrepreneurship

UNWTO has been developing a series of country investment guides focusing on "Tourism and Business", which constitute a collection of reports that analyse a country's current investment climate as well as opportunities in its tourism sector. The guides are a tool at the service of tourism investment and their objective is to offer, through the evaluation of various dimensions, valuable information and guidance on the advantages and conditions of foreign direct investment in a



country. In the Americas, [Colombia](#), the [Dominican Republic](#), and [Paraguay](#) already have their Investment Guides.

42. The Development Bank of Latin America (CAF) has joined forces with UNWTO to encourage and retain investments in the tourism sector through the creation of five new guides for Barbados, Ecuador, El Salvador, Panama and Uruguay. During the 118th Executive Council it was agreed that CAF would also finance Brazil's guide. On its own initiative, Chile is also working on its own UNWTO Investment Guide. As a new feature, these documents will include a special chapter on sustainable financing

(d) Enhance competitiveness and resilience: market intelligence, statistics and product development

i. Best Tourism Villages by UNWTO:

43. The "Best Tourism Villages" initiative is the flagship project of the UNWTO Programme on Tourism and Rural Development. The Programme aims to ensure that tourism contributes to reducing regional inequalities in income and development, fighting depopulation, advancing gender equality and the empowerment of women and youth, boosting innovation and digitalization, improving connectivity, infrastructure and access to finance and investment, innovate in product development and value chain integration, promote sustainable practices for more efficient use of resources and reduction of emissions and waste, and improve education and skills. The Programme promotes multi-level governance and the active participation and empowerment of communities
44. The awards ceremony took place in Al-Ula (Saudi Arabia) on 12 and 13 March 2023, coinciding with the first face-to-face meeting of the "Best Tourism Villages by UNWTO" network. The award-winning villages of the region were:
 - Puqueldón (Chile)
 - Choachí (Colombia)
 - Aguarico (Ecuador)
 - Angochagua (Ecuador)
 - Creel (Mexico)
 - El Fuerte (Mexico)
 - Lamas (Peru)
 - Raqchi (Peru)
 -

UNWTO will work with the following villages participating in the improvement programme:

- Trevelin (Argentina)
- Ninhue (Chile)
- San Vicente de Chucuri (Colombia)
- Barichara (Colombia)
- Bella Vista (Paraguay)
- Castara (Trinidad and Tobago)

ii. International Code for the Protection of Tourists

45. The ICPT represents a crucial reference framework to restore consumer confidence and accelerate the recovery of tourism by providing all tourism actors, both public and private, with practical guidance on how to assist tourists affected by emergencies, health or otherwise, and develop and harmonize the rights of tourists as consumers in the post-COVID-19 world.
46. To date, Uruguay, Ecuador, Guatemala and Paraguay have adhered to the Code and we have received communications from Costa Rica and Honduras to adhere to it in the context of this meeting.



iii. Creation of the Observatory on Tourism Law in Latin America and the Caribbean

47. In collaboration with the IDB, work is underway on the creation of the first Tourism Law Observatory in Latin America and the Caribbean with the main objective of becoming a regional digital tool that, in a continuous and systematic manner, allows obtaining, organizing, analysing, updating and disseminating tourism regulations, both in force and those that are in the process of development by States drawing on academic collaborators who will be part of the project (universities, institutes, academic experts and researchers). With this premise, and with the result of the studies developed, the updating, improvement and harmonization of positive regulation at national and regional level will be promoted.

iv. Prospective reports on connectivity in the region

48. In order to provide our Members with current and detailed information on air connectivity, forward-looking regional trends, digital transformation in the travel sector, travel demand and travellers' intentions for the coming months, the Regional Department has initiated discussions with AMADEUS for the joint preparation of forward-looking reports for the region.

v. Regional offices:

49. Regional offices: Negotiations continue with the governments of Brazil—for the opening of a regional office in Rio de Janeiro—and Argentina. Colombia, for its part, has expressed its interest in establishing a thematic office focused on education and sustainability.

(e) Scale up innovation and digital transformation

50. Innovative Community Tourism Experiences Competition: The objective of the competition of the World Tourism Organization (UNWTO) and the Tourism Authority of Panama (ATP), is to develop new marketable sustainable tourism experiences that highlight the natural and cultural heritage of Panama, as well as the authenticity of its local communities, improving the quality of life of its residents.

Services to Members

51. Efforts for collecting contributions are of utmost importance to be able to provide more and better services to our Members. We wish to implement a policy of close relations, providing the institutional support that States require.

Relations with International Organizations and other partners

52. Activities:

- Inter-American Development Bank (IDB): Support for the establishment of the 1st Observatory of Tourism Law in Latin America and the Caribbean
- Casa de América: Reception cocktail with authorities of Latin America and the Caribbean (January 2023), with the support of the Development Bank of Latin America (CAF)
- Development Bank of Latin America (CAF): Signing of an agreement to promote and retain investment in tourism throughout the Latin American and Caribbean region (Madrid, 19 January 2023)
- Ibero-American General Secretariat (SEGIB): Drafting of a Memorandum of Understanding (in progress)
- Secretariat of Central American Tourism Integration (SITCA): renewal of a Memorandum of Understanding (in progress)
- South American Football Confederation (CONMEBOL): Negotiation of a Memorandum of Understanding with the aim of raising awareness of the role played by South American football and sports tourism in the destination brand, as well as its economic and social benefits for local communities (TBC: signing date)



- Instituto Cervantes: Participation in the IX International Congress of the Spanish Language (27 March 2023) and possible signing of a Memorandum of Understanding for the development of Spanish language tourism (in progress)

Technical assistance projects

- Update of the Master Plan for the Sustainable Development of the tourism sector of Paraguay for the period 2023-2030
- Technical assistance for Honduras in the areas of statistics, destination management and tourism observatories, with the signing a Memorandum of Understanding in progress
- Technical assistance requested by Ecuador to provide legal advice on nature tourism, in order to advance in international standards of registration simplification and guarantees, as well as operational and contingency plans
- Advising Peru on issues related to security, destination management, demand incentives and "Smart Cities"
- In the process of signing an agreement with Panama to carry out the Design of a Tourism Intelligence System (with funds from the IDB) and to be executed by the UNWTO
- Dominican Republic: Request for technical assistance to mitigate sargassum and to advance sustainability (in progress)



Anexo I: List of events held in the Americas from 19 May 2022 to 27 June 2023

1. 67th Meeting of the Regional Commission for the Americas and Seminar on the International Code for the Protection of Tourists (May 19-20, 2022, Punta del Este, **Uruguay**)
2. Centre Stage: Workshop on “Businesswomen that make an impact in Dominican tourism” (22 September 2023, Santo Domingo, **Dominican Republic**)
3. Centre Stage: Workshop on “Businesswomen that make an impact in Costa Rican tourism” (June 2023, San José, **Costa Rica**)
4. Webinar on “Violence against Women in the Tourism Sector: Breaking the Taboo” (November 2022)
5. 118th session of the UNWTO Executive Council (16-18 May 2023, Punta Cana, **Dominican Republic**)
6. Tourism Tech Adventures – **Panama**: Innovative Community Tourism Experiences (18-19 May 2023)



Annex II: List of new Affiliate Members in the Americas

The following entities became UNWTO Affiliate Members since the 67th meeting of the UNWTO Commission for the Americas:

- 116th session of the UNWTO Executive Council (Jeddah, Saudi Arabia, June 2022):
 - Corporación Municipal de Turismo de Vicuña (Chile)
 - Netflix (United States)
 - Tourism Industry Association of Canada (Canada)
 - Universidad Laica Eloy Alfaro de Manabí - Facultad de Turismo (Ecuador)
- 117th session of the UNWTO Executive Council (Marrakesh, Morocco, November 2022):
 - Escuela Profesional de Turismo de la Universidad Nacional de San Antonio Abad del Cusco (Peru)
 - Manifest Destinations Group (United States)
 - Onward (United States)
 - Smart Tourism & Hospitality Consulting (Panama)
- 118th session of the UNWTO Executive Council (Punta Cana, Dominican Republic):
 - Blue Purple Vail (United States)
 - Observatorio Turístico Sostenible del Estado de Querétaro (Mexico)

