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### 3. Report of the Secretary-General

#### Introduction

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1. The present report to the 64th Meeting of the UNWTO Commission for the Americas addresses the following subjects:
  - A. **International Tourism in 2018 and 2019** (Based on the 2019 January issue of the *UNWTO World Tourism Barometer*).
  - B. **Implementation of Programme of Work 2018 and 2019 overview** (Based on the UNWTO Management Vision and Priorities endorsed by the 108th session of the UNWTO Executive Council, San Sebastián, Spain, 23-25 May 2018).

#### A. International tourism in 2018 and 2019

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2. Based on data reported in the January issue of UNWTO World Tourism Barometer, international tourist arrivals (overnight visitors) grew 6% in 2018 compared to the previous year to reach 1.4 billion. UNWTO's long-term forecast issued in 2010 indicated the 1.4 billion mark would be reached in 2020, yet stronger economic growth, more affordable air travel, technological changes, new businesses models and greater visa facilitation around the world have accelerated growth in recent years.
3. This result represents a consolidation of the strong results of 2017 (+7%) and exceeds the rate of 4% or higher growth recorded every year since 2010. Growth also exceeded UNWTO's forecast of 4% to 5% for the year 2018.
4. In relative terms, the Middle East (+10%), Africa (+7%), Asia and the Pacific and Europe (both at +6%) led growth in 2018. Arrivals to the Americas were below the world average (+3%).
5. The Americas (+3%) welcomed 217 million international arrivals in 2018, with mixed results across destinations. Growth was led by North America (+4%), and followed by South America (+3%), while Central America and the Caribbean (both -2%) reached very mixed results, the latter reflecting the impact of the September 2017 hurricanes Irma and Maria.
6. 2018 was characterized by sustained growth in many destinations and a firm recovery in those that suffered decreases in previous years. Results were partly shaped by the global economic upswing and the robust outbound demand from many traditional and emerging source markets, particularly a rebound in tourism spending from Brazil and the Russian Federation after a few years of declines.
7. With few exceptions, data reported to date on international tourism receipts confirm the positive trend recorded in tourist arrivals in 2018. Preliminary data on international tourism receipts for the first six to twelve months of 2018 have been reported by 131 countries and territories so far. Of the reporting destinations, 109 destinations posted growth in tourism export earnings compared to the same period last year (in local currencies at current prices), whereas 22 reported a decrease.

8. Preliminary data on international tourism expenditure reported by countries for 2018 reflect an increasing demand from major source markets, consistent with the robust 6% growth in international arrivals recorded in the same period.
9. Based on current trends, economic prospects and the UNWTO Confidence Index, UNWTO forecasts international arrivals to grow 3% to 4% in 2019, more in line with historic growth trends. Arrivals in the Americas are forecast to grow 2% to 3% in 2019, in line with the 3% increase in 2018.
10. As a general backdrop, the stability of fuel prices tends to translate into affordable air travel while air connectivity continues to improve in many destinations, facilitating the diversification of source markets. Trends also show strong outbound travel among the growing middle class from emerging markets, especially India and Russia but also from smaller Asian and Arab source markets.
11. IATA expects passenger traffic (RPK) to grow 6.0% in 2019 (both domestic and international flights), slightly below the 6.5% increase of 2018.
12. At the same time, the global economic slowdown, the growing uncertainty related to Brexit and its expected negative impact in the important UK outbound market, as well as geopolitical and trade tensions may prompt a 'wait and see' attitude among investors and travellers.
13. In its latest World Economic Outlook (WEO, April 2019), the International Monetary Fund (IMF) revised down its forecasts for 2019. Global growth is now forecast at 3.3% in 2019 (down from 3.7% in the October WEO) and below the 3.6% rate of 2018. However, IMF expects a gradual recovery in the second half of 2019, after a stabilization in the first part of the year. Growth is expected to return to 3.6% in 2020.
14. After an extremely strong 2018, confidence in global tourism show signs of slowing down according to the latest UNWTO Tourism Confidence Index survey. On a scale of 0 to 200, the Panel evaluated tourism performance in 2018 with a score of 141, higher than the expectations expressed at the beginning of the year (137). For 2019, experts have become more cautious, rating the prospects with an overall score of 122, one of the lowest in the past decade.
15. Overall, 2019 is expected to see the consolidation among consumers of emerging trends such as the quest for 'travel to change and to show', 'the pursuit of healthy options' such as walking, wellness and sports tourism, 'multigenerational travel' as a result of demographic changes and more responsible travel.
16. Digitalization, new business models, more affordable travel and societal changes are expected to continue shaping the sector, so both destination and companies need to adapt if they want to remain competitive.
17. The forthcoming *UNWTO World Tourism Barometer* will be published in mid-May 2019.

## **B. Implementation of Programme of Work 2018 and 2019 overview**

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### **Priority 1: Make tourism smarter: innovation and the digital transformation**

18. The Secretariat has put a strong emphasis on innovation since the beginning of 2018, bringing together the key stakeholders, including governments, academia, corporations, SMEs and start-ups, investors (business and super business angels, venture capital, etc.) and business development partners (accelerators, incubators, etc.) in order to boost innovation and entrepreneurship. The work aims at mainstreaming tourism to contribute to the SDG 9 of the 2030 Agenda.

#### **Partnerships for innovation**

19. An important step has been to build partnerships with innovation leaders.

- (a) Agreements were signed with:

- IE Business School: promoting innovation and entrepreneurship and strengthening the role of academia in the tourism sector.
  - Vynn Capital: encouraging tourism players in adopting a digital strategy, embracing innovation and fostering investments into tourism technology.
  - Unidigital: boosting innovation and entrepreneurship in tourism and to connecting innovation and entrepreneurship ecosystems in the Americas.
  - Globalia: fostering innovation and competitiveness in tourism and identifying the most disruptive tourism start-ups.
  - Sony Music: developing innovative strategy for destination branding.
  - Instituto Tecnológico Hotelero: new technologies, hotel operations, energy efficiency and environment and innovation.
  - Barcelona Football Club: promoting synergies between sports and tourism.
  - The Basque Culinary Centre: 1st UNWTO Gastronomy Tourism Start-up Competition.
  - Portugal Ventures: boost innovation and support tourism start-ups with great potential to transform the tourism sector in a sustainable manner.
  - Amadeus: cooperation to contribute to the 2030 Agenda for Sustainable Development and the 17 Sustainable Development Goals (SDGs) in the context of travel and tourism.
  - Niantic: developing innovative tourism experiences through the use of augmented reality and location-based video games.
  - EGEDA: promoting the 17 Sustainable Development Goals (SDGs) and cultural tourism through the audio-visual sector.
- (b) In addition, preliminary collaborations in order a) to foster stronger relationships between the private sector and our Member States and b) to further boost the innovation and entrepreneurship ecosystem and promote skills, discussions have been initiated with innovation leaders and Affiliate Members such as Google, Pacific Asia Travel Association (PATA) as well as other leaders like IBM, Financial Times, Massachusetts Institute for Technology (MIT), Rebus, Trivu, Plug and Play, Atomico, DRORE, MasterCard and Booking.
- (c) Furthermore, stronger relations were built with Member States regarding innovation with the objective of developing a programme of work that would foster an innovation and investment culture by connecting entrepreneurs and investors. Partnerships have been initiated with Portugal, Colombia, Bahrain, Egypt, Thailand, Chile, Brazil, Panama, Argentina, Spain, Qatar and Georgia.

### **UNWTO Innovation Hubs Network**

20. In line with the UNWTO Innovation and Digital Transformation Strategy, the UNWTO Innovation Hubs Network will unify the leading Innovation Hubs worldwide into one Network dedicated to connecting and scaling up the innovation and entrepreneurship ecosystems of UNWTO Member States, by bringing together leading tourism stakeholders, including governments, academia, corporations, SMEs and start-ups, investors (business and super business angels, venture capital, etc.) and supporting business partners (accelerators, incubators, etc.). This Network will be comprised of Innovation Hubs in all five regions of the world and would facilitate collaboration, inspiration and capacity building on how to scale and go global. UNWTO Member States will actively be involved by launching innovation challenges.

### **Sharing innovative solutions**

21. UNWTO, through innovation fora dedicated to tourism, has brought together all the actors of the ecosystem to boost innovation, entrepreneurship and investment in tourism. Major events and initiatives exist presenting innovative solutions:

- (a) The [2nd World Conference on Smart Destinations](#), as the annual gathering of international tourism experts, discussed the opportunities and challenges for the tourism sector, and destinations in particular, arising from the development, implementation and management of innovative products and services that are based on new technological solutions (Oviedo, Spain). The Conference was preceded by the 1st Hackathon for Smart Destinations and a research and development day, which brought start-ups and academics together to work on ways to bring smart, innovative and sustainable solutions to the sector.
- (b) UNWTO supported the Tourism Innovation Challenge that brought together start-ups and investors to connect and drive tourism innovation in Colombia.
- (c) The [4th UNWTO World Forum on Gastronomy Tourism](#) (Bangkok, Thailand), in collaboration with the Basque Culinary Center, addressed topics ranging from the role of technology in achieving sustainable development, to linking the whole tourism value chain to gastronomy while the 5th UNWTO World Forum on Gastronomy Tourism (2-3 May, San Sebastián, Spain) focused on the job creation and entrepreneurship. (<http://www2.unwto.org/event/5th-unwto-world-forum-gastronomy-tourism-0>)
- (d) In order to raise awareness on tourism's actual and potential contribution to sustainable development (Budapest, Hungary), this year's [World Tourism Day](#) (WTD) explored the opportunities provided by technological advances in tourism, including big data, artificial intelligence and digital platforms. Among Panel Discussions, which included leading international experts from Booking, PATA, Moonrakers and Vynn Capital, the 20 most disruptive start-ups from the 1st UNWTO Tourism Start-up Competition presented their solutions that will revolutionize the tourism sector. The 2019 edition of World Tourism Day will have the theme Tourism and Jobs: a better future for all (India), coinciding with the Organization's overall focus for 2019 on education skills and jobs.
- (e) In the wake of the 4th Industrial Revolution, the 1st UNWTO Tourism Start-up Competition sought the most disruptive start-ups that are currently transforming the way people travel and experience tourism. The first edition of this competition was launched in the framework of World Tourism Day 2018 and gathered over 3,000 applications representing 133 countries. The winning start-up, Israeli-based Refundit, was awarded the top prize in the final of the competition in January 2019. Given interest in this first competition, other additions of the competition have been launched in 2019, including:
- [1st UNWTO Gastronomy Tourism Start-up Competition](#) The opening call received over 300 submissions from 80 countries with finalists representing Italy, Spain, Israel, the Czech Republic and Japan. These finalists presented their proposals in San Sebastian, Spain on 3 May 2019 within the framework of the 5th UNWTO World Forum on Gastronomy Tourism;
  - Tourism Tech Adventures: Sports, in collaboration with Futbol Club Barcelona to be carried out with the sponsorship of the Qatar National Tourism Council (QNTC).
- (f) In order to highlight the significant role of the private sector in the advancement of innovative solutions and the deployment of technology in cultural tourism, in collaboration with the Iranian Cultural Heritage, Handicrafts and Tourism Organization, the Affiliate Members Department organized the 40th UNWTO Affiliate Members Plenary Session: International Seminar on Harnessing Cultural Tourism through Innovation and Technology (12-14 November, 2018). The seminar provided a specialized platform for UNWTO Member States, Affiliate Members and relevant stakeholders to exchange information and experiences. It aimed to recognize the opportunities of integrating innovative governance into the management of cultural tourism destinations; build public-private partnerships to develop synergy and boost cooperation among involved stakeholders towards advancing and implementing innovative cultural tourism practices and deploy appropriate technologies. It also aimed to develop strategic and innovative tourism products by understanding the current social trends and customer needs in the area of cultural tourism.
- (g) For the first time UNWTO launched an innovation initiative in Africa, the UNWTO/NEPAD Tourism Tech Adventure: African Tourism Start-ups, an initiative dedicated to supporting

the African start-ups that will lead the transformation of the tourism sector. In January 2019, within the framework of the International Tourism Fair, FITUR, five African start-ups received sponsorship to learn, pitch and travel in one of the world's top tourism destinations and gained exposure to the world's tourism leaders, investors, corporates, academia and supporting business partners. The start-ups of the initiative have received a one-week scholarship with IE Business School to develop their start-ups and meet other social innovators.

- (h) Dedicated to tourism and bringing together all the actors of the ecosystem to boost innovation, entrepreneurship, and, especially, investment in tourism, the Tourism Tech Adventure Forums include activities such as High-Level Seminars for Ministers, Start-up Masterclasses, one-on-one networking sessions between start-ups, corporations and investors, hackathons and start-up competitions. These events can be adapted to global, regional, local and even vertical levels, like sport and gastronomy tourism. Forums have been held in Bahrain, Argentina, Spain, Egypt and Colombia with the following events planned:
- UNWTO Gastronomy Tech Adventures: Georgia (Tbilisi, Kakheti Region, Georgia);
  - 2nd UNWTO Tourism Tech Adventure for the Americas: Ed Tech (Santiago de Chile, Chile).
- (i) The call for applications for the [15th UNWTO Awards](#) was opened between mid-August and end October 2018. The Awards recognize the contribution of public and private institutions and NGOs to development of a more competitive, responsible and sustainable tourism sector that works towards achieving the 2030 Sustainable Development Agenda in the areas of public policy, enterprises and NGOs. Initiatives at local, national, regional and international levels are all considered. Finalists were announced in January 2019. The winners will be announced at the UNWTO General Assembly in September 2019.
- (j) To advance the digitalization of UNWTO, the Organization is preparing a market intelligence dashboard. The UNWTO Tourism Insights Dashboard will be an online platform for Member States and all stakeholders to access UNWTO data and insights.
- (k) **UNWTO.QUEST**. To strengthen institutional capacities and governance at destination level, UNWTO has developed UNWTO.QUEST Programme, a Certification System addressed to Destination Management Organizations (DMOs) - mainly at regional and local level. Its aim is to reinforce their internal capacities and strengthen three key performance areas in destination management: Strategic Leadership, Effective Execution and Efficient Governance. UNWTO Academy supports the DMOs in an ongoing improvement process based on capacity building activities in order to achieve the Certification standards and hence overcome any identified weaknesses and gaps. Punta del Este Convention Bureau (Uruguay) and Agencia Córdoba Turismo (Argentina) have been the first DMOs awarded with UNWTO.QUEST Certification (2019). Since not all destinations have a DMO, UNWTO.QUEST can also accompany UNWTO Members in the process of creation of DMOs at local and regional level by providing them with guidance and recommendations when setting up a new DMO.
- (l) In the framework of the 'UNWTO 2019 Year of Education, Skills and Jobs', the UNWTO, in collaboration with Google, organized a Ministerial Panel Discussion on Digital Skills in Tourism within the framework of ITB Berlin. This event brought together Ministers of Tourism from across Europe to discuss how to advance digital education and skills development in the sector.
- (m) UNWTO's activities on the Silk Roads are supported by a collaborative platform of 34 Member States and numerous UNWTO Affiliate Members. The initiative is engaged in major activities, including: (i) advocacy work and the organization of Silk Road events, the most recent of which took place in Thessaloniki in October 2018; (ii) the implementation of capacity building and route development activities, especially together with UNESCO in Central Asia; and (iii) the conduction of marketing, Silk Road data collection and research training throughout several Member States. As to upcoming activities, UNWTO and Google Greece will be developing a joint Silk Road project in the Region of Central Macedonia of



Greece focused on improving the tourism and digital skills of public and private tourism stakeholders. Together with the World Bank, the Organization will be engaged in sustainable tourism activities within the Province of Gansu in China, while cooperation with partner Silk Road universities will be upscaled to improve our knowledge of the historic routes in a way that ensures quality education and jobs, and common understanding.

## Priority 2: Grow our competitive edge: investments and entrepreneurship

### Improving the business environment

22. Activities reported under priority 1 above contribute to this priority, notably by improving the business environment in UNWTO Member States and by stimulating entrepreneurship and SMEs in tourism and other sectors along the tourism value chain. The work aims at mainstreaming tourism to contribute to the SDG 8 of the 2030 Agenda.

23. The Secretariat is working on driving changes in the tourism private sector, not through short-term actions but through long-term impact by generating knowledge, empowering stakeholders and inspiring action for the tourism sector to fully embrace sustainable development. Against this background, the Affiliate Members Department endeavours to have more Affiliate Members and engage them in UNWTO's values, standards and activities.

### Venture Capital Network

24. The Secretariat is working with Rakuten, K Fund, Portugal Ventures, Vynn Capital, Motive Partners, THCAP Venture Capital, Dux Capital, Mountain Nazca Colombia, Kaszek Ventures, VARIV Capital, Angel Ventures and Zouyu Capital among others with the aim of boosting an investment culture in tourism.

### New Technologies

25. UNWTO is collaborating with Rebus to create a UNWTO Events Webapp with a view to:

- Support the digital transformation process of the UNWTO Secretariat.
- Create added value for UNWTO events participants by engaging them before, during and after events.

### Promoting tourism competitiveness

26. In order to support Member States in becoming more competitive through, among others, the promotion of specific products or segments are supported in UNWTO events, such as:

- (a) Gastronomy tourism and wine tourism, exploring issues related to product diversification, job creation and rural development through tourism. UNWTO supports its Member State through innovative product development providing a framework through which the private and public sector collaborate to create tourism products and increase the competitiveness and sustainability of destinations. A project for gastronomy tourism development is currently being implemented in Ubud, Indonesia. UNWTO and the Basque Culinary Center (BCC) co-organized the [5th UNWTO World Forum on Gastronomy Tourism](#) on 2-3 May 2019 at San Sebastián, Spain.
- (b) UNWTO is currently working on shopping tourism experiences project in the municipality of León, Guanajuato, Mexico. The project includes the development of innovative experiences and the integration of companies and individuals from other sectors in the tourism value chain to promoting job creation and new opportunities and will be concluded at the end of 2019.
- (c) Tourism routes, in order provide insights on how to better market, promote destinations, facilitate travel and ultimately attract investments through transnational tourism experiences and products.



- (d) Urban destinations, exploring the diverse and innovative segments cities can bring together, with special emphasis on the role of technology, governance and public-private collaboration models and the need to place tourism higher in the urban agenda. UNWTO organized on 5 April the First Mayors Forum for Sustainable Tourism in Lisbon, Portugal focusing on cities for all and will organize the 8th UNWTO Global Summit on Urban Tourism, on 9-12 October in Nursultan, Kazakhstan. The Mayors Forum, the first of its kind aiming at bringing the tourism higher in the urban agenda, approved the Lisbon Declaration on Cities for all (<http://www2.unwto.org/event/unwto-mayors-forum-sustainable-urban-tourism>). UNWTO is also currently finalising a Benchmarking Study on New Platform Tourism Services – rules and regulations in the accommodation industry. The project aims to provide an overview of the rules and regulations in place concerning the private accommodation rental market in selected destinations with around 20+ case studies from around the world.
- (e) Technology, creating opportunities for a more seamless tourism experience, better destination branding and smarter management, which in turn boosts investment.
- (f) Data and analysis provided by the *UNWTO World Tourism Barometer* that aim at disseminating knowledge, contributing to decision-making and consequently enhancing competitiveness of destinations.
- (g) Rural tourism, as a tool for socio-economic revitalization and a way to add value to the natural and cultural resources of communities at a time of depopulation in many developed countries.
- (h) Sports tourism, a growing sub-sector with enormous potential worldwide.
- (i) The meetings industry and health tourism as segments with increased potential to fight seasonality and attract high level spending. In this scope, UNWTO is working with ICCA to deliver training to its Member States on the meetings industry (the first of which will take place during the 8<sup>th</sup> UNWTO Global Summit on Urban Tourism) and will hold a special session on Health Tourism during the General Assembly in September, reflecting research published with the European Travel Commission in late 2018 on this topic (<https://www2.unwto.org/press-release/2018-12-20/unwtoetc-launch-report-health-tourism>).
- (j) The *UNWTO Committee on Tourism and Competitiveness* (CTC) is working on the elaboration (in-house within the Secretariat) of the first position paper on the selected factor for competitiveness 'Tourism policy and strategic planning' as part of the Work Plan for the Committee on Tourism and Competitiveness (CTC) for the period of 2018-2019 agreed upon by the CTC Members. By setting the scene as regards the conceptual framework on tourism policy and strategic planning the Committee aims to provide UNWTO Members with a ground work which shall contribute to a successful process of formulation and implementation of sound tourism policies as they are the cornerstone for the competitiveness of a tourism destination.

### Priority 3: Create more and better jobs: education and employment

#### UNWTO.Academy

27. As one of the pillars under this priority, UNWTO has created the [UNWTO.Academy](#), including international training centres and an online education and training platform to improve skills, education and specialized training programmes. The UNWTO.Academy was presented in May 2018, in the framework of the 108<sup>th</sup> session of the Executive Council, replacing the UNWTO.Themis Foundation created 20 years ago. The work aims at mainstreaming tourism to contribute to the SDG 4 and SDG 8 of the 2030 Agenda.

28. During this last year, the Academy has been very active, offering training sessions and courses on different issues: sustainable destination management, governance for local development, designing a promotional strategy, tourism and circular economy, digital transformation, etc.

### **Tourism education**

29. Strengthening Members' capacity in tourism education is one of the areas of work of the UNWTO Academy, and in this past year 2018 658 participants of 15 different nationalities have been trained through onsite, online and blended initiatives offered in English and Spanish in the Americas, Europe and the Middle East, which were requested by National Tourist Administrations, Universities of the UNWTO.TedQual network and international organizations.

30. Discussions have been held with Portugal, Switzerland, Georgia and Costa Rica to start delivering Executive Education through International Centres in these countries during 2019. The first International centre will be officially opened in Portugal this summer.

31. UNWTO has just announced the creation of a global online Tourism Education and Training platform that will create a unique access to online Tourism education and training, including the offer of partner Institutions.

32. Fostering Members sustainability and competitiveness is also a priority for UNWTO through the two UNWTO quality seals – UNWTO.TedQual and UNWTO Quest programmes. UNWTO has certified 2 Destination Management Organizations and has helped 57 Tourism Education and Training programmes through the UNWTO.TedQual Certification during 2018.

### **Promoting Job creation**

33. UNWTO aims also at supporting Members in the development of frameworks and policies that enable job creation. A first step is to create active and strong working groups with the participation of all industry stakeholders from the public and private sector (leading companies and Academia) to establish the current needs of the industry and write-up, jointly with the UNWTO operative departments, policy papers and content for specialized education and training courses to be delivered by the UNWTO Academy.

34. In line with this, UNWTO will advance research on the future of work in the sector. As requested at the 8th Meeting of the G20 Ministers of Tourism held in Argentina, a report on the subject will be presented by UNWTO at the 9th Meeting to be held in Japan, in October 2019.

### **Talent development and image of employment in tourism**

35. The work of the Organization can be illustrated by a regional seminar that took place in the Middle East (Egypt) and that discussed policies and strategies to address key issues in the region such as a) the creation of quality jobs and closing the decent work deficit, b) skills development, c) the stimulation of youth employment and women participation in the tourism labour market and d) supporting tourism MSMEs for economic growth and job creation.

36. The future of digitalization and the new skills needed for this was also discussed at the High level discussion in ITB this year.

37. In addition, UNWTO is actively working on Talent Development initiatives. During 2019, the World Students' League will be launched through which groups of students will compete to come-up with the best and most innovative ideas for the challenges the sector is facing.

### **Priority 4: Build resilience and facilitate travel: safe, secure and seamless travel**

38. The UNWTO Secretariat analysed global visa policies and the progress made in visa facilitation over the past ten years, supporting destinations with evidence-based policy making and helping to prioritize activities within their facilitation policies. The global average openness of destinations continued to rise in 2018 to 37, with 100 being the highest score and 0 the lowest.

39. The results of the Secretariat's work have been presented to the technical advisory group on the traveller identification programme of the International Civil Aviation Organization at its 2nd meeting.

40. UNWTO collaborated with the World Health Organization (WHO) to improve countries' preparedness to public health emergencies and participated in WHO's High-level Conference on Preparedness to



Public Health Emergencies which took place in Lyon on 3-4 December 2018. The [Lyon Conference Statement](#) stresses the need for improved information sharing as required by the International Health regulations and integrated approaches across the actors of air transportation, public health and tourism.

41. UNWTO contributed also to the work of the Working Group on Travel, Tourism, and Outbreaks led by the World Economic Forum (WEF), which aims at improving Pandemic Preparedness and related Communications to prevent and reduce the implications from the outbreaks of communicable diseases.

42. The First UNWTO/ICAO Ministerial Conference on Tourism and Air Transport in Africa which took place in Cabo Verde in March 2019 aimed at building on progress and advancements achieved in both sectors as well as to generate pragmatic solutions that will enable African States to maximize the benefits of tourism development and air transport services in the continent. As part of the conference preparations, UNWTO prepared a dedicated report on 2019 Visa Openness for Africa, which was released during the conference and is available [here](#) for download.

#### **Priority 5: Protect our heritage: social, cultural and environmental sustainability**

##### **Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies**

43. UNWTO, in collaboration with UN Environment and with support from the French Government, researched national tourism policies with the objective of gaining insights on the integration of Sustainable Consumption and Production (SCP) patterns into tourism policies. The report is based on 101 national tourism policies and presents the first global assessment of SCP policy instruments in tourism policies. The report also contributes to visualizing the progress achieved towards the implementation of SDG Target 12.b and existing connections between national tourism policies and the rest of targets under SDG 12. By recommending five strategic approaches, the report ultimately aims to inspire stakeholders and encourage them to advance SDG implementation through sustainable tourism. The full report is available [here](#).

##### **Measuring the Sustainability of Tourism**

44. The [Measuring the Sustainability of Tourism](#) (MST) project is expanding the field of tourism statistics beyond the measurement of volumes and economic impacts to include also social and environmental aspects. It is a response to requests from UNWTO Member States and other stakeholders for guidance on measuring the complex phenomenon of sustainability in tourism. Led by the multidisciplinary Working Group of Experts on MST, under auspices of the UNWTO Committee on Statistics and the Tourism Satellite Account and supported by the UN, MST will help to better understand the status of tourism sustainability and monitor progress. This is especially relevant in the era of Sustainable Development Goals.

45. The MST project takes a step-by-step approach through: the development of a statistical framework, reaching international consensus and UN approval, implementation in countries, and compilation into datasets.

46. UNWTO, through its Committee on Statistics and the Tourism Satellite Account, has been responsible for the development of the only two international standards available in tourism, and it is now pioneering what could become the third: the Statistical Framework for Measuring the Sustainability of Tourism. Building on the 2017 Manila Call for Action on Measuring Sustainable Tourism which embodied a global commitment to MST at political and technical level, the Statistical Framework for MST has undergone various drafts and consultations, as well as pilot testing in countries. Two global consultations are planned before finalizing the document in the course of 2019. It is planned to present the Statistical Framework for MST for UN approval in March 2020, at the fifty-first session of the UN Statistical Commission. Because the development of any statistical standard is as much a political endeavour as it is a technical development, National Tourism Administrations can play an important role by liaising with their respective National Statistical Institutes at the highest level.

47. With regard to the implementation of international standards, UNWTO continues its capacity building activities on basic tourism statistics and TSA, notably in [Africa](#). It also maintains the most comprehensive database available on the tourism sector.

48. The [UNWTO International Network of Sustainable Tourism Observatories \(INSTO\)](#) welcomed the establishment of three new observatories in 2018. The Alentejo Sustainable Tourism Observatory (ASTO) in Portugal was welcomed on the occasion of FITUR 2018 while the South Tyrol Sustainable Tourism Observatory, in Italy, and the Observatory of the city of Panama, in Panama, both joined the network in October 2018 as the newest partners of committed destinations monitoring sustainable tourism development. In January 2019 during FITUR joined the first Observatory in Spain (Navarra).

49. The [2018 Global INSTO Meeting](#) was held on 22-23 October 2018 at UNWTO Headquarters in Madrid. Continuing the tradition of the previous years, the Meeting offered a mentoring breakfast, discussion rounds and workshops in order to exchange knowledge on achievements and challenges in measuring social, environmental and economic tourism impacts at destinations. In keeping with UNWTO's priority of promoting technological innovation that fosters sustainable tourism, attendees took part in three workshops on the potential of geo-referenced information for destination planning.

### UNGA Sustainable Tourism Report and Resolution

50. In July 2018, UNWTO submitted to the 73rd UNGA, the report on the "[Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection](#)". The report features the advances in sustainable tourism policies made since 2016 and includes recommendations on ways and means to promote sustainable tourism, including ecotourism, as a tool for fighting poverty and promoting sustainable development in a balanced and integrated manner. Based on the report prepared by UNWTO, the UN General Assembly adopted, on 20 December 2018, by consensus, the resolution entitled, "*Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection*" ([A/RES/73/245](#)). The resolution which was sponsored by a total of 94 delegations recognizes that sustainable tourism, including ecotourism, is a cross-cutting activity that can contribute to the three dimensions of sustainable development and the achievement of the SDGs and underlines the importance of ensuring responsible resource management, addressing the negative impacts of unbalanced tourism, respecting environmental and sociocultural capacities and stresses, among others, the need to ensure the integration of sustainable consumption and production patterns in the tourism sector.

### Sustainable consumption and production in the tourism sector – the One Planet Sustainable Tourism Programme

51. An effective implementation mechanism for SDG12: In 2018, the Sustainable Tourism Programme of the One Planet network (formerly known as 10-Year Framework of Programmes on Sustainable Consumption and Production) continued raising the international visibility of governments, civil society and academia working on the implementation of SDG12 through advocacy materials and events. The third issue of the [Annual Magazine](#) titled "Lead.Innovate.Finance.Empower" was released by the Coordination Desk with support from UNWTO and the Republic of Korea in June 2018 and features a selection of inspiring and innovative cases connected to a shared goal: decoupling tourism growth from the increased use of natural resources. An official side-[event](#) was organized by UNWTO on 18 July 2018 during the celebrations of the High Level Political Forum at the UN Headquarters in New York on the theme "Tourism and Construction: Circular Economy Solutions for SDG12" and in collaboration with the Sustainable Buildings and Construction Programme of the One Planet network. The side-event allowed government representatives from Bhutan, Botswana, Finland and Mexico to showcase their ongoing action to accelerate the shift to SCP while contributing to sustainable and resilient societies.

52. Providing tools and solutions for the shift to SCP: The Sustainable Tourism Programme has also continued tacking stock and raising awareness of ongoing projects, tools and solutions to accelerate SCP in the tourism sector. In 2018, over 100 initiatives and resources were connected to the [programme's online portfolio](#) covering a variety of topics such as local economic development, the inclusion of women's groups through upcycling, creating linkages with MSMEs in the tourism supply chain, food loss and waste reduction, sustainable resource use or sustainable destination management. As part of the ongoing [webinar series](#), the Coordination Desk with support from UN Environment and the French government organized three additional sessions on 28 March, 6 June and 28 November with the following titles:

“Sustainable business models on circularity in the built environment”, “Circular economy – exploring an innovative approach for the tourism sector” and “Circularity in sports events”.

53. Leading the shift to SCP: A total of 21 new partners joined the Sustainable Tourism Programme in 2018 (6 NGO; 5 industry associations; 4 business; 3 academia; 1 government and 1 international organization) bringing the total of members up to 161. With the adoption of the Resolution A/RES/73/245 on the Promotion of Sustainable tourism by the United Nations General Assembly on 20 December, which is based on a report prepared by UNWTO and includes an explicit invitation for Member States and stakeholders to join the Sustainable Tourism Programme, it is expected that proactive organizations will soon join the efforts of current members to lead the shift to SCP.

54. Demonstrating the impacts of SCP: The majority of the portfolio activities of the Sustainable Tourism Programme have a focus on biodiversity protection (22%), followed by GHG emissions reduction (21%) and energy efficiency (15%) and waste reduction (14%) but the quantification of impacts remains a challenge. To continue bringing added value and providing guidance on strategic approaches for SCP in tourism in connection with sound measurement of impacts, the Coordination Desk launched in the month of November 2018 the Working Group on Tourism and the Circular Economy involving 12 partner organizations and 11 external experts as a participatory platform to formulate recommendations for tourism stakeholders to embrace circular economy principles. The work aims at mainstreaming tourism to contribute to the SDG 12 of the 2030 Agenda.

55. In March 2019, UNWTO was appointed by the One Planet Secretariat (UN Environment) to continue leading the One Planet Sustainable Tourism Programme for the period 2019 - 2022. The Government of France (Ministry for the Ecological and Inclusive Transition) was also renewed as Co-lead. The expressions of interest received for the two additional Co-lead seats are under discussion and evaluation.

56. In April 2019, the One Planet Sustainable Tourism Programme has started with support the French Government, UN Environment and UNWTO, a cycle of online trainings to support tourism practitioners in integrating sustainable consumption and production patterns in their everyday operations. These trainings offer network members (and beyond) the opportunity to access free of charge short courses on the use of open tools and methodologies designed to advance the resource efficiency of tourism operations and will put a strong accent on the use of measurement and monitoring frameworks to better understand the environmental and social outcomes of SCP. The recordings of training sessions can be accessed [here](#)

### **Tourism congestion management**

57. With the view of supporting Members and the sector at large in tourism congestion management in urban destinations, UNWTO issued the report ‘Overtourism? Understanding and managing urban tourism growth beyond perceptions’ (including a second volume with 18 case studies) and organized the [7th UNWTO Global Summit](#) that brought together high-level representatives from cities, national tourism administrations, private sector and international organizations to share experiences and expertise and set a shared 2030 vision on urban tourism that addresses the current challenges of managing tourism growth in cities through innovation, digital transformation and sustainability. The Mayor’s Forum for Sustainable Urban Tourism ‘Cities for all: building cities for citizens and visitors’ (Lisbon, 5 April, 2019) and the 8th UNWTO Urban Tourism Summit (Nursultan, Kazakhstan, 9-12 October 2019) aim to continue advancing this agenda. Furthermore, UNWTO partnered with IPSOS on the first ever global survey conducted by UNWTO. The online survey was conducted across 15 countries and targeted 12,000 people to better understand residents’ perception towards city tourism, its impacts and management strategies. (Initial results are available here <http://www2.unwto.org/press-release/2019-01-25/first-ever-unwtoipsos-survey-citizens-recognize-positive-impact-tourism>).

### **Tourism and climate change**

58. The UNWTO Secretary-General called for the tourism sector to take more action to combat climate change and biodiversity loss during the [30th joint meeting of its Commissions for South Asia and Asia-Pacific](#) in Fiji in 2018. There is a need for developing island countries to collaborate on actionable policies, with measurable results, to address climate change and biodiversity protection within the tourism sector. UNWTO pledges to raise further awareness of climate change’s impacts and effects on tourism through capacity-building and educational opportunities. The work aims at mainstreaming tourism to contribute to the SDG 13 of the 2030 Agenda.

59. UNWTO, together with the International Transportation Forum (ITF) is working on an updated estimate, from a transport perspective, of the overall contribution of the tourism sector to GHG emissions, with actionable policy recommendations. The results of this research are expected in the first half of 2019. Within the framework of the study, an in-house retreat, with the participation of ITF, Amadeus, Innovation Norway and the Western Research Institute, was held at UNWTO headquarters on 19-21 November 2018. The meeting aimed at analysing tourism and related air transport demand as well as to brainstorm and advance on the scenarios-policy implications for reduced emission intensity and actionable tourism policy recommendations which are the main expected outputs from the study.

### Gender equality and tourism

60. The importance of gender equality and the empowerment of women and girls has been underscored in the United Nations' Sustainable Development Goal 5 - Achieve gender equality and empower all women and girls by 2030. Tourism being an industry in which women make up the majority of the workforce, although still concentrated in lower-paid, more vulnerable employment, is particularly concerned towards gender equality. The work aims at mainstreaming tourism to contribute to the SDG 5 of the 2030 Agenda.

61. Against this backdrop and in view of the success of the [First Edition of the Global Report on Women in Tourism](#), UNWTO has partnered again with UN Women for a [Second Edition of the Report](#) which has counted with further backing from new partners: GIZ (the German Development Agency), World Bank and Amadeus. Initial findings were presented in Berlin at ITB 2019.

62. Moreover, prompted by 12 women Ministers of Tourism in Africa, the **UNWTO Leadership Taskforce on Women Empowerment in the tourism sector** was created in 2018. The Taskforce has thus far held three meetings and agreed its Terms of Reference.

63. In the same context and with the aim of underscoring the need for a level playing field in the tourism sector to achieve equality, the [First UNWTO Regional Congress on Women Empowerment in the Tourism sector](#) will be hosted by the Government of the Republic of Ghana, in November 2019, with a focus on Africa.

### Tourism and Culture

64. Cultural tourism is seen as an important driver for supporting heritage conservation, safeguarding cultural expressions and economic development.

65. The [Declaration of the 3rd UNWTO/UNESCO World Conference on Tourism and Culture](#), which was held in Istanbul 3-5 December 2018 and counted with the participation of over 20 Ministers, highlighted the importance of strengthening synergies between tourism, culture and local community stakeholders in order to maximize the reach of the benefits of tourism.

66. The next World Conference on Tourism and Culture will be held in Kyoto, Japan.

### Accessible Tourism for All

67. UNWTO continues to collaborate on Accessible Tourism with the Spanish ONCE Foundation for the Social Inclusion of Persons with Disabilities as a central part of responsible and inclusive tourism development.

68. After having co-published extensive literature, manuals and Recommendations on Accessible Tourism in the past, the on-going partnership will now focus on developing and International Label for **Accessible Tourism Destinations** and preparing a **Labour Insertion Programme** for persons with disabilities interested in working in the tourism sector.

69. Further, together with the Ministry of Tourism of Ecuador, UNWTO is organizing the **First UNWTO International Conference on Tourism and Accessibility** which will be held in Quito, Ecuador, on 16-17 October 2019.

### Global Code of Ethics for Tourism

70. The **Global Code of Ethics for Tourism** is UNWTO's main policy document for responsible and sustainable tourism development.

71. The **World Committee on Tourism Ethics** (WCTE) is the impartial body responsible for interpreting, applying and evaluating the provisions of the Code. The [membership of the WCTE is renewed](#) by half every two years in accordance with resolution 636(XX) of the General Assembly. In this regards, four vacant positions are to be filled by September 2019 for a mandate of four years (2017-2021).

72. As part of the activities to promote the Global Code of Ethics for Tourism, the WCTE acts as jury of the [UNWTO Ethics Award](#) which is open to all companies and associations that are official signatories of the Private Sector Commitment to the Code of Ethics and have reported on its implementation. The laureate of the 2019 edition is the Brazilian entity Serviço Social do Comércio (Sesc) which is strongly committed to the principles of environmental and social responsibility and organizes a wide range of activities linked to Social Tourism.

73. The English version of the [Framework Convention on Tourism Ethics](#) - which is based on the Code of Ethics - was approved by the General Assembly in 2017. Following resolution 707(XXII), the Secretariat has coordinated the translation and validation of the text in all UNWTO Official Languages in order to present the Convention for adoption at the 23<sup>rd</sup> General Assembly (St Petersburg, Russian Federation 2019). If adopted, this would be the first International Convention of UNWTO.

#### **Tourism and SDGs – contributing to the 2030 Development Agenda**

74. In order to accelerate and scale up the achievement of the SDGs through tourism, UNWTO with the support of the Switzerland State Secretariat of Economic Affairs (SECO) launched an innovative online tool designed to provide the global community a space to co-create and engage to realize the 2030 Agenda through tourism. The platform [Tourism4SDGs.org](#) was launched in the framework of HLPF. It is a co-creation space that allows users to access a wide range of resources, add their own initiatives, findings and projects, motivate discussion and collaboration, and share content related to tourism and sustainable development. The space also provides a roadmap for the tourism sector towards 2030, to build a smarter, competitive, inclusive and sustainable sector for the people and planet. The work aims at mainstreaming tourism to contribute to the SDG 17 of the 2030 Agenda.

75. UNWTO is planning to organize a "Tourism Donors Round Table for the 2030 Agenda" aiming at scaling up International Aid flows for Tourism Financing for the 2030 Agenda, during the WTO-OECD Aid for Trade Review (3-5 July 2019) in Geneva, in partnership with other development partners and UNWTO Member States.