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### Report of the Secretary-General

#### Introduction

1. This report summarizes the main issues related to the recent developments in the tourism sector as well as to UNWTO activities since the last report to the 18th session of the General Assembly (October 2009). This report was prepared in August 2011; however it includes reference to activities planned for later during 2011 in order to provide the Assembly the most comprehensive information possible. Updated information will be provided directly to the 19th session of the General Assembly on the items considered pertinent.
2. The present report addresses the following subjects:
  - A. International Tourism – Current Situation and Short-term Prospects
  - B. Long-term Prospects for the Tourism Sector – *Tourism Towards 2030*
  - C. Mainstreaming Tourism in the Global Agenda – The Global Leaders for Tourism Campaign
  - D. Implementation of the Programme of Work 2010-2011 and Draft Programme of Work 2012-2013
  - E. Administrative and Statutory Matters
  - F. The White Paper – A Reform Process for a More Relevant UNWTO

Some of the above-mentioned subjects have constituted the object of dedicated reports for the 19<sup>th</sup> session of the General Assembly.

#### A. International Tourism – Current Situation and Short-term Prospects

3. **International tourism in 2010:** Following the decline registered in 2009, one of the most challenging years for international tourism in decades, the sector rebounded strongly in 2010. International tourist arrivals were up 7% to 940 million and international tourism receipts grew by 5% to reach US\$ 919 billion (693 billion euros). Reflecting global economic conditions, recovery came at different speeds and was primarily driven by emerging economies.
4. **All world regions posted positive growth** in both international tourist arrivals and receipts in 2010. Africa (+7% in arrivals and +4% in receipts), the only region to show positive figures in 2009, maintained growth during 2010. Asia and the Pacific (+13% in arrivals and in receipts), the first region to recover from the 2009 setback, grew strongly with international tourist arrivals reaching a new historic record of 204 million. The Middle East was also one of the strongest growing regions in 2010 (+14% in arrivals and receipts), but on very depressed figures in 2009. The Americas (+6% in

arrivals and +5% in receipts) also rebounded from the decline in 2009 and reached new highs. In Europe (+3% in arrivals but flat in receipts), recovery was slower than in other regions. However, the sector gained momentum from the second half of 2010 and several individual countries performed well above the regional average in Europe.

5. **International tourism in the first half of 2011:** Following a year of recovery in 2010, growth continued in the first months of 2011 at a slower, but sustained pace. During the first six months of 2011, international tourist arrivals grew by almost 5%, confirming that in spite of several challenges, the recovery of international tourism which was remarkably strong in 2010 is consolidating. Growth in advanced economies (+4.3%) has picked up stronger and is now very close to that of emerging economies (+4.8%), which have been the driver of international tourism growth in recent years. This trend reflects the decreases registered in the Middle East and North Africa as well as a slight slowdown in the growth of some Asian destinations, after a very strong 2010.
6. **Regional results in 2011:** Results were positive in all world (sub)regions with the exception of the Middle East and North Africa during the first half of 2011. Results were better than expected in Europe (+6%), boosted by the recovery of Northern and Central/Eastern Europe, and the temporary redistribution of travel to destinations in Southern and Mediterranean Europe due to developments in North Africa (-13%) and the Middle East (-11%). Sub-Saharan Africa (+9%) nonetheless did extremely well. Asia and the Pacific, the region with one of the fastest developments in previous years, consolidated its growth but at slower pace (+5%), mainly driven by the very positive results of South-East and South Asia. The Americas (+6%) was slightly above the world average, with particularly strong results for South America.
7. **Prospects for full year 2011:** UNWTO forecasts international tourist arrivals to end 2011 at plus 4% to 5% – a rate slightly above the 4% long-term average. The developments in the Middle East and North Africa as well as the tragic events in Japan, although impacting on the results of the respective regions, do not alter the global forecast. As international tourism receipts have been more affected by the crisis and recovered somewhat slower than arrivals in 2010, 2011 should also see a further improvement in terms of receipts.
8. In spite of the positive results of the first half of 2011, recent months have brought a rise in global risks and increased reasons for caution:
  - In spite of a 4.3% growth forecast by the International Monetary Fund (IMF) for 2011, the **global economy** is showing signs of increased volatility affecting both advanced and emerging economies. Growth in many advanced economies is still weak and the greater-than-anticipated weakness in US economy coupled with financial volatility coming from fiscal challenges in the euro area pose greater downside risks. Simultaneously, signs of overheating are becoming increasingly apparent in many emerging and developing economies;
  - Persistent high **unemployment** continues to be a source of major concern as the pace of job creation during 2010 and 2011 is still far too weak to compensate for the jobs lost during the economic crisis; according to the International Labour Organization (ILO) global employment levels will not recover until 2015;
  - **Interest rates and inflation** continue to pose risks, especially in regards to oil, food and commodity prices volatility;
  - **Austerity measures** in advanced economies, particularly in Europe, risk sapping the economic recovery, with a direct impact on the speed of the tourism growth;
  - The recent trend of introducing **new and/or increasing existing taxation on travel and tourism** as a means of balancing public accounts continues to represent a serious challenge to the sector. While the call for fiscal consolidation is totally understandable, an unfair level of taxes carries the risk of affecting tourism's proven capacity to stimulate job creation and

economic growth, with negative impacts on outbound countries' economies and on the development possibilities of emerging economies, where tourism represents an increasingly important share of foreign income and employment opportunities; and

- Geopolitical changes and recent **developments in the Middle East and North Africa** pose extra challenges and uncertainty.
9. On the positive side, other **indicators confirm UNWTO analysis and prove the strength of the tourism sector** in the first part of 2011 – international air transport grew by 8% up to June 2011 according to the International Air Transport Association (IATA). These results clearly make the case for tourism and reinforce our call to consider tourism as a priority on national policies as a sector which can play a key role in terms of socio-economic growth and development, particularly at a moment when many economies struggle to consolidate recovery and create employment.
  10. Considering that the current document was prepared in August 2011, an update of the above information will be provided to the Assembly during its 19<sup>th</sup> session.

## **B. Long-term Prospects for the Tourism Sector – *Tourism Towards 2030***

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11. The first decade of the 21st century was a decade of extraordinary tourism growth, but also of enormous changes and shocks: a decade that began with September 11 - which for many marks the shift in paradigm for the tourism sector - and ended with the global economic crisis of 2008-2009.
12. In 2000, international tourist arrivals stood at 687 million. By 2010, this number had increased to 940 million – nearly 250 million tourists more in ten years. And we are now well on course to hit the one billion mark in the very near future. International tourism receipts almost doubled in the same period - from US\$482 billion in 2000 to over US\$900 billion in 2010.
13. During this period, the world has opened up. New destinations have emerged. Over the past ten years we have witnessed the rise of the emerging countries - tourism has followed the same trend. In 2000, emerging economies held a 38% share of international tourist arrivals: by 2010 this had increased to 47%. Today, out of the 940 million international tourist arrivals in the world, nearly half are to emerging economies.
14. This framework created the need for an evaluation and revision of UNWTO long-term forecast, *Tourism Vision 2020*.
15. Following three years of intensive research, the Secretariat will official launch, on the occasion of the 19th session of the General Assembly, the new UNWTO long-term forecast for international tourism: ***Tourism Towards 2030***.
16. The project aims to assist Members in formulating long-term strategies and policies; provide a global reference on tourism future developments; constitute the basis for UNWTO strategic recommendations and guidelines in several areas; and strengthen UNWTO's leadership role in terms of global tourism agenda.
17. Built on UNWTO's previous experience on long-term forecasting with *Tourism 2020 Vision*, *Tourism Towards 2030* includes a more comprehensive analysis of qualitative tourism trends as well as a more detailed quantitative component which includes forecasting by region, means of transport and economic categories.

18. The report is divided into a quantitative and a qualitative part. While the latter includes an assessment of major trends shaping tourism development in recent decades as well as a set of future trends, the quantitative part provides forecasting for some 140 individual flows with results presented by:
- arrival (sub)region
  - departure region
  - advanced versus emerging economies
  - surface versus air transport
  - intra-regional versus inter-regional
19. Main results (for further information please see Annex I):
- By 2030, UNWTO forecast the world to reach between 1.7 and 1.9 billion international tourist arrivals;
  - Growth in international tourist arrivals is expected to continue in the period 2010-2030, but at a more moderate pace: between 3.0% and 3.5% a year as compared to 4.2% a year between 1980-2020.
  - The expected slowdown in the growth pace of international tourist arrivals is a result of:
    - o higher base volumes
    - o lower GDP growth
    - o lower elasticity of travel to GDP
    - o an halt in declining air transport costs and a move toward increased air transport costs
  - By region, Asia and the Pacific, the Middle East and Africa will continue to increase their share of total arrivals, while Europe and the Americas are expected to see a further decrease in share. In percentage terms, the fastest growth in international tourist arrivals will be in North-East Asia and South Asia, while the slowest is forecast to be in North America and the Caribbean.
20. A detailed presentation of the *Tourism Towards 2030* results will be delivered during the 19th session of the General Assembly (final results might be adjusted).
21. As recommended by the Executive Council at its 90th session, the Secretariat will work to conduct periodical updates on the main findings of this study and incorporate the area of long-term trends and forecasting as a regular and ongoing line of research in the programme of work.

### **C. Mainstreaming Tourism in the Global Agenda – The Global Leaders for Tourism Campaign**

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22. Despite its growing relevance and proven contribution to GDP, jobs and exports, tourism still lacks due political and economic recognition. During the period in review, the Secretariat has continued to call for tourism to be considered higher in the global and national agendas. In this regard, together with increased communication and outreach activities, the Secretary-General has met several Heads of State and Government since October 2009 to continue highlighting the value of tourism to economic growth and development.
23. During the late part of 2009 and throughout 2010, the Secretary-General promoted the principles of the **Roadmap to Recovery**, as approved at the 18th session of the General Assembly, calling upon world leaders to include tourism in recovery strategies as a vehicle to stimulate the economy and employment and encouraging public policies which support tourism's economic and development

potential. In this period, the Secretary-General held meetings with 17 Heads of States and Government: President Turk of Slovenia (December 2009); President Zapatero and His Majesty King Juan Carlos I of Spain (November 2009); President Zuma of South Africa (February 2010), President Rahmon of the Republic of Tajikistan (May 2010); Prime Minister Ahmed Ouyahia of Algeria (May 2010); President Leonel Fernández of the Dominican Republic (May 2010); Prime Minister Samdech Hun Sen of Cambodia (May 2010); President José Mujica of Uruguay (June 2010); Vice President Franco Gómez of Paraguay (June 2010); President Saakashvili and Prime Minister Gilauri of Georgia (June 2010); Vice-President Abd Al-Rab Mansur Hadi of Yemen (June 2010); Prime-Minister Vejjajiva of Thailand (July 2010); Chairman Haris Silajdžić of the Presidency of Bosnia and Herzegovina (July 2010); His Majesty King Abdullah II of Jordan (August 2010); Prime Minister Kosor of Croatia (August 2010). The Secretary-General also met during this period Interim President Foued Mebazaa of Tunisia (April 2011) and Prime Minister Essam Sharaf of Egypt (May 2011) on the occasion of official visits to both countries to support their tourism recovery.

24. Within the continuous objective of positioning tourism as a priority in the global agenda, a new initiative has been launched at the beginning of 2011 – the **Global Leaders for Tourism campaign** ('Golden Book'). The campaign is a joint initiative by UNWTO and WTTC, as both organizations decided to join efforts in their common goal of promoting the socio-economic importance of tourism. UNWTO and WTTC are presenting an Open Letter to Heads of State and Government worldwide, seeking their acknowledgement of the relevance of travel and tourism in facing today's global challenges. Up to the end of August 2011, ten dignitaries had joined the campaign: President Calderón of Mexico (February 2011); President Zuma of South Africa (May 2011); President Nazarbayev of Kazakhstan (May 2011); President Schmitt of Hungary (May 2011); President Compaoré of Burkina Faso (June 2011); President Yudhoyono of Indonesia (June 2011); President Kibaki of Kenya (June 2011); President Guebuza of Mozambique (June 2011); President Serzh Sargsyan of Armenia (July 2011); President Băsescu of Romania (July 2011) and Vice-Primer Wang Qishan of China (September 2011). Many other Member States have expressed their keen interest in joining the campaign. The initiative, which will continue throughout 2011 and 2012, includes the publication, in the first half of 2012, of a Book on Leaders for Tourism with information of tourism in the respective country, quotes and photo of the delivery of the Open Letter. (Further information on the campaign is available in Annex II<sup>1</sup>).
25. Also in this framework, there was a positive evolution of the **T.20 members-driven initiative**. This initiative, originated at the side-lines of the 18<sup>th</sup> session of the General Assembly under the leadership of South Africa, advanced significantly. During the period under review, the T.20 held two Tourism Ministers Meetings (February 2010 in South Africa and October 2010 in the Republic of Korea). These were an opportunity to share research and information on the importance of tourism to the T.20 economies and design common strategies to make the case for tourism. Both meetings concluded on the relevance of this initiative in linking the agendas of the T.20 and the G20 in areas such as economic growth, employment, the green economy, trade, investment, and development. The conclusions of the 2<sup>nd</sup> T.20 Meeting (the Communiqué) were officially transmitted to the President of the Republic of Korea as Chairman of the G20 in 2010. The 3<sup>rd</sup> Meeting of T.20 will be hosted by France in Paris (24-25 October 2011).
26. The Secretariat has also been working within the UN system to move **tourism higher on the sustainability and the development agendas**. Efforts have been strengthened ahead of Rio+20, the UN Conference on Sustainable Development (UNCSD), to take place in 2012 with a focus on the Green Economy in the context of poverty eradication and sustainable development. In this framework, two initiatives are of particular relevance: a) the publication in 2011 of the Chapter on **Tourism and the Green Economy** making of tourism one of the ten sectors to integrate the Green Economy Initiative; and b) the creation in 2010 of the **UN Steering Committee on Tourism for**

<sup>1</sup> See also <http://leadersfortourism.unwto.org/en>

**Development (SCTD).** The latter brings together, under the leadership of UNWTO as the UN specialized agency on tourism, eight other UN agencies and programmes (ILO, UNCTAD, UNEP, UNDP, UNIDO, UNESCO, the World Trade Organization (WTO) and the International Trade Centre (ITC)) to deliver a more coordinated, effective and efficient technical assistance and support to developing countries in the area of tourism. One of the SCTD's first activities was the organization of a Special Event on Tourism during the Fourth UN Conference on Least Developed Countries (LDC-IV) held in May 2011 promoting the value of tourism as a poverty reduction tool.

## **D. Implementation of the Programme of Work 2010-2011 and Draft Programme of Work 2012-2013**

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### ***D.1 Implementation of the Programme of Work 2010-2011***

27. The implementation of the Programme of Work (POW) 2010-2011 was carried out according to its two strategic objectives: **(a) competitiveness** and **(b) sustainability**.

28. Detailed information is provided in document A/19/9. Among the activities carried out, some are worth highlighting:

a. **Events:** Major events were held namely:

- The 1<sup>st</sup> and 2<sup>nd</sup> UNWTO Tourism Investment Forum for Africa – INVESTOUR, FITUR, Madrid, Spain (January 2010 and 2011);
- the UNWTO/EXCELTUR International Tourism Leadership Forum, Madrid, Spain (January 2010);
- the UNWTO/South Africa International Summit on Tourism, Sport and Mega Events, Johannesburg, South Africa (February 2010);
- the World Tourism Day High Level Dialogue on Tourism, Biodiversity and Sustainable Development, Guangzhou, People's Republic of China (September 2010);
- the 5<sup>th</sup> International Meeting on the Silk Road, Uzbekistan (October 2010);
- the Seventh UNWTO International Tourism Forum for Parliamentarians and Local Authorities in Puerto Vallarta, Mexico (November 2010);
- the UNWTO Ministers Summit at the World Travel Market in London, UK (November 2009 and 2010);
- the UNWTO/Mexican Government Side Event on Tourism's Response to Climate Change: What next in the context of the Conference of the Parties (COP 16) of the UN Framework Convention on Climate Change in Cancun, Mexico (December 2010);
- the First Global Tourism Forum Andorra 2011 in Andorra-la-Vella, Andorra (March 2011);
- the Silk Road Ministers Summit at ITB in Berlin, Germany (March 2011);
- the Tourism Special Event on "Promoting Tourism for Sustainable Development and Poverty Reduction in the framework of the 4th United Nations Conference on the Least Developed Countries (LDC-IV) in Istanbul, Turkey (May 2011);
- the Donor's Conference on the Regional Project on Sustainable Tourism Development in a Network of Cross-border Parks and Protected Areas in West Africa, Dakar, Senegal (May 2011)
- the UNWTO Forum on Tourism and Science: Bridging theory and practice in the Algarve, Portugal (June 2011);

Many other UNWTO technical and regional seminars and workshops took place, the detail of which is presented in document A/19/9.

- b. **Publications:** All areas of the POW 2010-2011 are covered by the research activity of the Secretariat during this period. It is worth highlighting among the published reports the following:

In the area of **Competitiveness:**

- the reinforcement in 2010 and 2011 of the frequency of the *UNWTO World Tourism Barometer* allowing Members a more effective monitoring of short-term tourism trends;
- the *Yearbook of Tourism Statistics* and the *Compendium of Tourism Statistics* (2010 and 2011), the latter in its renewed format featuring since 2011 new sets of data and indicators on inbound, outbound and domestic tourism, tourism industries, employment and macroeconomic international tourism related indicators;
- the *Report on the Implementation of the Roadmap for Recovery* (2010);
- the *UNWTO-ILO Report on Economic crisis, international tourism decline and its impact on the poor: An analysis of the effects of the global economic crisis on the employment of poor and vulnerable groups in the tourism sector* in the framework of the UN Global Pulse Initiative (June 2011);
- the Reports on the *Chinese and the Spanish Outbound Markets to Africa* (2010 and 2011) and the *Spanish Outbound to the Americas* (2010);
- the Study on *Budgets of National Tourism Organizations, 2008-2009*, a benchmarking reference tool on inbound tourism marketing in collaboration with ETC (2010);
- the Report on *Tourism and Demographic Change*, in collaboration with ETC (2010);
- the *Handbook on Tourism Product Development*, in collaboration with ETC (2011); and
- the Report on *Policy and Practice for Global Tourism*, a guide to the major themes in world tourism today published by the UNWTO Affiliate Members Programme (2011).

In the area of **Sustainability:**

- the Report on the *Green Economy and Tourism* within the Green Economy Initiative, in collaboration with UNEP (2011);
- the First *UNWTO/UN Women Global Report on Women in Tourism* (2011);
- the Report on *Tourism and Migration* (2010);
- The Report on *Tourism and Biodiversity – Achieving Common Goals towards Biodiversity (2010) and the Practical Guide for developing biodiversity based tourism products* (2011);
- The series of 10 publications on *Energy Efficiency and Renewable Energy for the accommodation sector in the European Union*, within the framework of the Hotel Energy Solutions (HES) project (2011); and
- The Report on *Collaborative Processes for Sustainable and Competitive Tourism and the Manual on Tourism and Poverty Alleviation*, in collaboration with SNV (2010).

- c. **Technical Cooperation and Development Assistance:** During the period under review, a total of 52 projects were implemented or under implementation within the ST-EP Initiative portfolio benefiting over 30 countries in all five regions. Furthermore, several technical missions were carried out and a series of major projects were under implementation, namely:
- 14 technical cooperation projects in several fields in over 24 Member States;
  - eleven Spanish MDG Achievement Fund (MDG-F) projects in Ecuador, Egypt, Honduras, Nicaragua, Panama, Peru, Senegal, Serbia and Turkey;
  - a project on energy efficiency for the accommodation sector in Europe (Hotel Energy Solutions);

- the completion under the coordination of the UNWTO Consulting Unit on Tourism and Biodiversity (Bonn, Germany) of the Programme on Energy Efficiency in Kho Khao, Thailand (2008-2010) and the launching of new Energy Efficiency Project for Indonesia (2010-2013), funded by the German International Climate Initiative.
- d. **Education and Capacity Building:** Given the priority ascribed to training and capacity building within the POW 2010-2011, and often implemented by the UNWTO Themis Foundation, which has been assigned within the Secretariat, the main responsibility in this area, several training courses and capacity building activities were held in the various regions covering key areas such as:
  - statistics and Tourism Satellite Account (TSA)
  - marketing and promotion,
  - media and communications,
  - risk and crisis management, and
  - sustainable development.
- e. **Risk and Crisis Management:** Considering the volatility affecting the tourism sector in recent years, the Secretariat has reinforced during the period under review its activities in the areas of risk and crisis management with the objective of supporting Member States to prepare and deal in a more effective way with a varied number of potential crisis situations. In this regard, capacity-building activities and seminars were held in areas such as communication, travel advisories, product design and the integration of tourism into national emergency structures and procedures. Special support was given to Japan, Egypt and Tunisia during the period under review.

## ***D.2 Special Initiatives and Projects***

29. Seven special initiatives and projects have been created or further developed during the period under review.
30. Detailed information on these is included in document A/19/9 and some will be object of dedicated presentations during this 19<sup>th</sup> session of the General Assembly.
  - a. **Legal instrument on tourist/consumer protection:** In response to the clear need for global guidelines on the subject, and following the Executive Council Decision at its 89<sup>th</sup> session, the Secretariat has advanced a feasibility study for a possible set guidelines/international legal instrument for tourist/consumer protection. A preparatory meeting was organized during ITB Berlin (March 2011) and a first meeting of the working group on tourist/consumer protection was held in April 2011. The meeting of the working group had a wide and high-level participation from Member States, international organizations (IATA, ICAO, EU and ECTA) and representatives from the private sector, particularly from the accommodation industry and from tour operators/travel agencies. A consensus was reached on the need to work on a document which can provide both guidelines and binding norms. At its 90<sup>th</sup> session, the Executive Council agreed with the proposed approach and invited the Secretary-General to prepare guidelines and recommended practices on the protection of tourists/consumers under the umbrella of the Global Code of Ethics. The second meeting of the Working Group will be held on September 2011 to continue the work as defined by the Executive Council.
  - b. **Use of Geo-references, Date and Time in Travel Advice and Event Information:** The 18<sup>th</sup> General Assembly Resolution A/RES/578(XVIII) on the *Declaration on the facilitation of tourist travel* entrusted the Secretary-General to "promote the principles set in the Declaration, including the use

of modern information and communication technologies, in relation with travel advisories and visa facilitation". In this regard, the Secretariat has been working on the definition of a set of "Recommendations on the use of Geo-references, Date and Time in Travel Advice and Event Information" with the aim of improving the relevance, efficiency, transparency of travel advices and limit unnecessary repercussions of information related to negative events, while making use of the increasing role of the internet and other forms of electronic communications in the dissemination of information. Building on the technical consultation organized at the Secretariat's Headquarters in March 2011, a proposal of "Recommendations on the use of Geo-references, Date and Time in Travel Advice and Event Information" was submitted to the 90th session of Executive Council. The Members welcomed the recommendations and these are now presented to the 19<sup>th</sup> session of the General Assembly.

- c. **Platma** ([www.platma.org](http://www.platma.org)), the online professional network for the UNWTO Affiliate Members has been under development during 2010 and was officially launched at the Spanish Tourism Fair (FITUR) in Madrid, January 2011. The network, which is now open for use by all Affiliates and interested organizations, has been developed to help Affiliate Members share knowledge, experiences and best practices. During 2011, the platform will be developed further technologically and a team of community managers will help Affiliate Members get the most out of using the network.
- d. Lastly, the **UNWTO Knowledge Network** – within the membership of the Affiliate Members, a community of knowledge in scientific, technological and procedural matters related to tourism launched in September 2010 to support UNWTO and its Member States by fostering innovation and knowledge management programmes and projects – is currently consolidating its membership and plan of activities. The Network currently has 122 institutions worldwide, actively contributing to the creation, dissemination and application of knowledge in all matters concerning tourism analysis, policy, governance and operations.
- e. **Hotel Energy Solutions (HES)** is a UNWTO-initiated project, supported by Intelligent Energy Europe programme aimed at increasing energy efficiency (EE) in European small and medium hotels by 20% and their use of renewable energies (RE) by 10%. As a main output the project has developed an online toolkit providing hoteliers with a report which shows their current energy use and recommends appropriate renewable energy and energy efficiency technologies and actions. The project has been implemented in partnership the United Nations Environment Programme (UNEP), the International Hotel & Restaurant Association (IH&RA), the European Renewable Energy Council (EREC) as well as and the French Environment and Energy Management Agency (ADEME).
- f. In response to the request of the Member States at the 18<sup>th</sup> session of the General Assembly, a new phase of the **Silk Road** Programme was launched in 2010. The new phase aims at implementing practical, collaborative initiatives to develop a strengthened Silk Road brand that will drive tourism demand, investment and sustainable development across the Silk Road regions by focusing on three key areas: a) marketing and promotion; b) capacity building and destination management and c) travel facilitation.
- g. Based on the recommendations of the feasibility study carried out in 2010, the Secretariat is building up a **Legal and Institutional Intelligence Gathering System on Tourism (LIIGST)** which will offer to Members, as from the second semester of 2011, two new information products, namely the Legal and Institutional Framework for Tourism Database (LIFT) and the online quarterly Tourism Law Newsletter in addition to the three existing consolidated information services (the Tourism Legislation Database (LEXTOUR), the International Instruments on Facilitation of Tourist Travel Database and the UNWTO/IFTTA Interactive Discussion Forum).

### **D.3 Draft Programme of Work 2012-2013**

31. The draft general programme of work and budget for the period 2012-2013 is submitted to the General Assembly for approval. It was prepared in the light of the findings of the Survey on Members' Priorities for 2012-2013 and based on:
- (a) the principle of continuity and connection to the work undertaken in 2010-2011 along the competitiveness and sustainability objectives;
  - (b) the lessons learned during previous biennia;
  - (c) the overall UN development agenda and its interrelation with tourism.
32. More specifically, the draft POW 2012-2013 was designed considering the need to:
- (a) reiterate one of the Organization's main aims – **fostering development through tourism**;
  - (b) building **partnerships** with regional and international entities and organizations in line with the objectives of the Organization;
  - (c) enlarge the **Technical Product Portfolio** and ensure consistency in all technical services offered to the Members;
  - (d) reinforce the **training and capacity-building** component, notably through the use of e-learning instruments;
  - (e) strengthen **communication** with the Members on strategic issues as well as on the work undertaken by the Secretariat;
  - (f) **mainstream tourism in the global agenda**; and
  - (g) align the activities of the Organization with the strategic framework outlined in the **White Paper**.
33. Following the POW 2010-2011, the draft POW 2012-2013 is designed around the two **strategic objectives** of: **a) Competitiveness**, aimed at continuously improving the Members' tourism supply, quality and excellence, human resources, marketing and promotion, supporting them preparing and facing crises and providing them with updated information and data on tourism trends, market forecasting and the economic contribution of tourism; and **b) Sustainability** aimed at increasing the contribution of tourism to all aspects of sustainability, namely poverty alleviation, environmental protection, climate change and biodiversity conservation, as well as its full integration in the local economies, ensuring fair benefits distribution. Both objectives are obviously not independent from each other and therefore, their differentiation is only for programming purposes. All Programmes will adopt a comprehensive approach combining elements of sustainability and competitiveness in conducting their work by establishing the necessary linkages.
34. Moreover, through the Survey on Priorities for 2012-2013, Members have generally validated the proposals made by the Secretariat, namely those related to the inclusion of **new areas of work** such as domestic tourism, employment and consumer protection. These will progressively and carefully be integrated in the work of the Organization.
35. The Secretariat has also accommodated the Members' recommendation of adopting, for the second biennium in a row, a **zero nominal growth** for the budget of the 2012-2013 biennium. Therefore, the total budget for 2012-2013 is the same as the one adopted for 2010-2011, and almost the same of 2008-2009: 25,200,000 Euros.
36. Furthermore, the POW 2012-2013 has been drafted considering as priority the strengthening of the Organization's managerial accountability and the pursuit for higher operational and administrative efficiency. In this regard, the Secretariat aims to advance the implementation of the results-based management and results-based budgeting (RBM and RBB) approaches and continued cost saving measures.

37. Detailed information is provided in document A/19/12 and annexes.

## **E. Administrative and Statutory Matters**

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### **E1. Human Resources**

38. Within the context of the restructuring of the Secretariat as announced to the Executive Council at its 87<sup>th</sup> Session in Astana (October 2010) the distribution of posts and corresponding levels and competencies has been finalized.
39. Following a preliminary review by an internal working group in 2010, a consultant was recruited in 2011 to review the proposed post levels in line with the new structure and existing ICSC guidelines on generic post classification. The purpose of the process, which can be defined as a breakthrough, was to optimize the Organization's staff and provide staff with career growth options. Objective eligibility criteria, transparent procedures and clear definition of competencies will surely result in a more organized and fair handling of competencies and expectations in line with the demands of the Organization's mission and programme of work.
40. The Secretariat, is presenting to the 19<sup>th</sup> session of the General Assembly (as it has done to the 89<sup>th</sup> session of the Executive Council) a detailed report on the human resources situation in the Organization, including:
- (a) posts assigned to the programmes after revision of appropriations, and resulting reporting lines;
  - (b) published vacancies and resulting appointments, including expected retirement of staff in the Professional category and above during the current biennium;
  - (c) breakdown of staff by nationality and gender;
  - (d) term of office of elected staff; and
  - (e) staff-Management relations.

This information will be provided on a regular basis both to the Executive Council and to the General Assembly.

### **E2. Security Issues**

41. A dedicated officer has been assigned to coordinate security issues since March 2010 and to support employees' and members' safety both in the Headquarters premises and in out-of-premises activities.
42. Spain is at security level 1, the minimum level within the UN Department of Safety and Security (UNDSS) system. The Secretariat keeps regular contact with the host country's institutions in order to coordinate and streamline issues which may arise for UNWTO or other UN agencies in Spain, namely those related to entry procedures into the Secretariat premises, traffic and parking in and around the building, security for meetings and official visits to the UNWTO headquarters.
43. The level of security for missions and meeting abroad has increased significantly including a mandatory clearance requirement through UNDSS. The Secretariat maintains regular contacts with the host country authorities, the UNDSS Headquarters in New York and with local UNDSS offices where UNWTO events are organized.

### **E3. Legal and Procurement**

44. A Legal and Procurement Officer was appointed in March 2010. Since then, the communication of UNWTO signs to the World Intellectual Property Organization (WIPO) for protection under the Paris Convention and the development of Guidelines for the use of UNWTO signs have been secured.
45. The typology of agreements has been analysed and a policy for the conclusion of agreements has been developed including harmonized template agreements. The Legal Officer has systematically reviewed agreements, contracts and other documents with legal implications assessing the compliance with UNWTO Rules, Regulations and policy while mitigating the risks for the Organization and has also provided ad hoc legal advice on different topics.
46. In the field of Procurement, the Secretariat is currently developing procurement guidelines in accordance with UN best practices and harmonized template documents for internal use. Invitations to tender for common services items are already being conducted in accordance with UN policy and practices.

### **E4. Financial Situation**

47. During 2010 and 2011, the Secretariat continued its efforts to further rationalize and consolidate expenditure while improving the implementation level of the program of work. These efforts have resulted in higher levels of delivery within the context of a 'zero growth' budget for the Organization.
48. The financial situation of the Organization for 2011 is generally sound. According to the budgetary results for the current financial year at 30 June 2011, the financial planning is as follows: The **budgetary income for 2011**, including arrears received to date, is estimated at 10.3 million euro while **expenditure** is estimated at 10.9 million euros, thus is in line with the plan of expenditure and that of previous years (10.5 million and 10.0 million for 2009 and 2010).
49. The Secretariat will continue to monitor closely the actual income and expenditure situation and end-of-year estimates, should the annual target require any modification.
50. Detailed information is available in document A/19/10.

### **F. The White Paper – A Reform Process for a More Relevant UNWTO**

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51. The final draft of the White Paper, presented to the 19<sup>th</sup> session of the General Assembly, responds to both the commitment made by the Secretary-General to the 18<sup>th</sup> session of the General Assembly two years ago and to the request of the Organization's governing organs to embark upon a reform process so as to make UNWTO more relevant to Members and more efficient in addressing the current and future tourism and global development challenges.
52. Under the belief that for UNWTO to be recognized as a leader by the international community and the tourism sector it must become more relevant. This means that it should be able to foresee and address the major issues and challenges that the tourism sector is likely to confront in the next decade and beyond.
53. The White Paper aims to address concerns by the Members, and the belief of the Secretary-General, that UNWTO requires some fundamental changes in the way it operates, including the thematic areas in which it works, its structure, its management and also in the way it interacts with Member States, external entities and non-governmental stakeholders in the tourism sector in order to cope with the substantial quantitative and qualitative changes that the sector has gone through

since the Organization was created, and to cope with the new challenges it faces in the decade ahead.

54. It further tries to respond to the necessity of Member States strengthening the sense of ownership of the Organization, by means of greater participation in the definition of the priority areas and fulfilling a more active role in all its organs and technical committees.
55. The White Paper is a 'framework dialogue document', requiring Members to ponder carefully the considerations made in it and, whenever appropriate, to take the necessary decisions through its governing organs, be it the General Assembly or the Executive Council.
56. The approval and endorsement of the White Paper by Members would allow the Secretary-General to undertake in time the changes the Organization needs during his term of office (2010-2013), in order to enhance its effectiveness and leadership and, especially, the quality of the services it renders to Member States.
57. Some of these changes, namely those related to the structure of the Secretariat, have already started as informed to the Executive Council. The conversion into a programme-based structure has been concluded and an evaluation of the programmes will be carried out every two years while many structural managerial changes have already been implemented.
58. The restructuring aspects, as well as the strategic issues, are dealt with in an extensive way in the final draft of the White Paper scheduled for an in-depth debate during the 19th session of the General Assembly under agenda item 11.
59. The document presented now to the General Assembly to reach a consensual approval benefits from the comments made during the 88th and 89th sessions of the Executive Council as well as from the comments received from various Member States.

## Annex I

**UNWTO Tourism Towards 2030: A Brief Overview****1. Background and objectives**

The *UNWTO Tourism Towards 2030* research project is a continuation of UNWTO's work in the area of long-term forecasting initiated in the 1990s and aims at:

- Assisting UNWTO members in formulating policies and long-term strategic plans;
- Providing a global reference on tourism's future development;
- Reinforcing UNWTO's role in agenda-setting for tourism-related subjects;
- Constituting a reference for UNWTO strategic documents, programme of work and activities.

The latest UNWTO project in this area was UNWTO Tourism 2020 Vision, elaborated in the late 1990s and published in 2001, with 1995 as the base year. This study has since become a worldwide reference in terms of international tourism forecasts for UNWTO members (member states, associate and affiliate members), the international tourism community (including local governments, private sector, academia, consultant firms and others), media and the public at large.

The objective of UNWTO Tourism Towards 2030 is to update projections through 2030, and to enrich forecasts with an overview of the social, political, economic, environmental and technological factors which shaped tourism in the past and are expected to lead development and growth in the future.

**2. Model used**

For the quantitative forecast, a model has been constructed using as independent variables growth of Gross Domestic Product (GDP) (as a proxy for traveller affluence and business travel potential) and cost of travel, and international tourist arrivals as the dependent variable. With these variables the model is focussing on structural underlying trends of potential demand. For that reason, demand projections are only made at an aggregate level and not for individual destination countries. Projecting the latter is a more complex exercise as the extent to which a destination succeeds to tap into this potential depends to a fair degree on the effort put into developing tourism and attracting visitors by that destination.

As basis for the projection a matrix of data series has been used with regard to international tourist arrivals for 1980-2010 with the following 3 dimensions:

- 17 subregions of destination (5 of which can be broken down by advanced/emerging economies), making a total of 22;
- 5 regions of origin;
- 2 means of transport: air and surface.

In theory there are  $22 \times 5 \times 2 = 220$  flows with data for 31 years. As some flows are negligible (i.e., surface travel between most regions), this results in forecasting some 140 separate flows, which can be presented in various ways: by (sub)region of destination; by departure region; advanced vs. emerging economies; surface vs. air transport; within region vs. between regions, etc. and crossings of these.

In addition to the matrix described above, there is also a separate table of international tourist arrivals by subregion of destination and purpose of visit that is used to explore the evolution of the latter.

### 3. Main results

- Global growth in international tourist arrivals is forecast to continue, but at a more moderate pace, from an average of 4% a year (1995–2010) to a range of 3.0% to 3.5% (2010–2030), and gradually slowing down in time. This is a result of four factors:
  - The base volumes are higher;
  - Lower GDP growth, because economies are becoming more mature;
  - A lower elasticity of travel to GDP;
  - A move from falling transport costs to increasing ones.
- In absolute terms, however, this still represents an increase by about 45 million international arrivals a year on average, compared to an average increase by 27 million a year in the period 1995-2010.
- Asia and the Pacific and Africa will experience the fastest growth and will continue to increase their share of total arrivals, while Europe and the Americas will see a further decline, mostly because of slower growth of North America.
- By subregion, the fastest growth in arrivals in percentage terms will be for South Asia, while the slowest will be for North America.
- Air transport will continue to grow its share of total trips, but at a slower rate than in recent years.
- The split of arrivals by purpose of visit is not expected to vary substantially over time.

A sensitivity analysis has been conducted looking at the impact on the forecasts while taking into account three alternative scenarios, varying assumptions with regard to GDP growth and the evolution of travel cost. The results show that GDP growth is a much more influential variable than travel cost.

### 4. Looking beyond 2011, the way forward

- Over the past half century tourism has developed into a key driver of socio-economic progress through the creation of employment and businesses, infrastructure development and export revenues earned, both for advanced and emerging economies. The *UNWTO Tourism Towards 2030* project shows that there is still a substantial demand potential for further expansion in coming decades. Both established and new destinations can benefit from this opportunity, provided they take the necessary actions to shape the adequate conditions with regard to business environment, infrastructure, investment, facilitation and human resources.
- Along with this opportunity, challenges also arise in maximizing social and economic benefits and minimizing negative impacts. In other words, all tourism development needs to be guided by the principles of sustainable development. Expressed simply, sustainable tourism can be defined as: 'Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the sector, the environment and host communities.' Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee long-term sustainability. Thus, sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity.
  2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
  3. Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation. (Conceptual Definition, in: *Making Tourism More Sustainable: A Guide for Policy Makers*; UNWTO-UNEP 2004)
- *UNWTO Tourism Towards 2030 - Regional Reports* will be prepared in the course of the coming half year to be presented at the 2012 regional commission meetings: (Africa and the Middle East, the Americas, Asia and the Pacific, and Europe): a series of 4 studies about tourism development through 2030 at regional level, with synthetic information about trends and forecasts at global level, detailed illustration of regional projections and key trends, and the analysis of opportunities and challenges for each region.
  - The experience gained with this project calls for more explicit incorporation and integration of long-term trends and forecasting as a regular and ongoing line of research in the programme of work with regard to Tourism Trends and Marketing Strategies. Doing so would enable the Secretariat to conduct periodic updates on the main findings of the study and also extend over time the scope of study by exploring subjects such as domestic tourism, employment and specific products or segments.



# Tourism Towards 2030 Progress report

World Tourism Organization (UNWTO)  
Executive Council 90th Session  
Mombasa, Kenya  
19-21 June 2011

*\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\**



## UNWTO *Tourism 2020 Vision*

Series of 7 Reports:

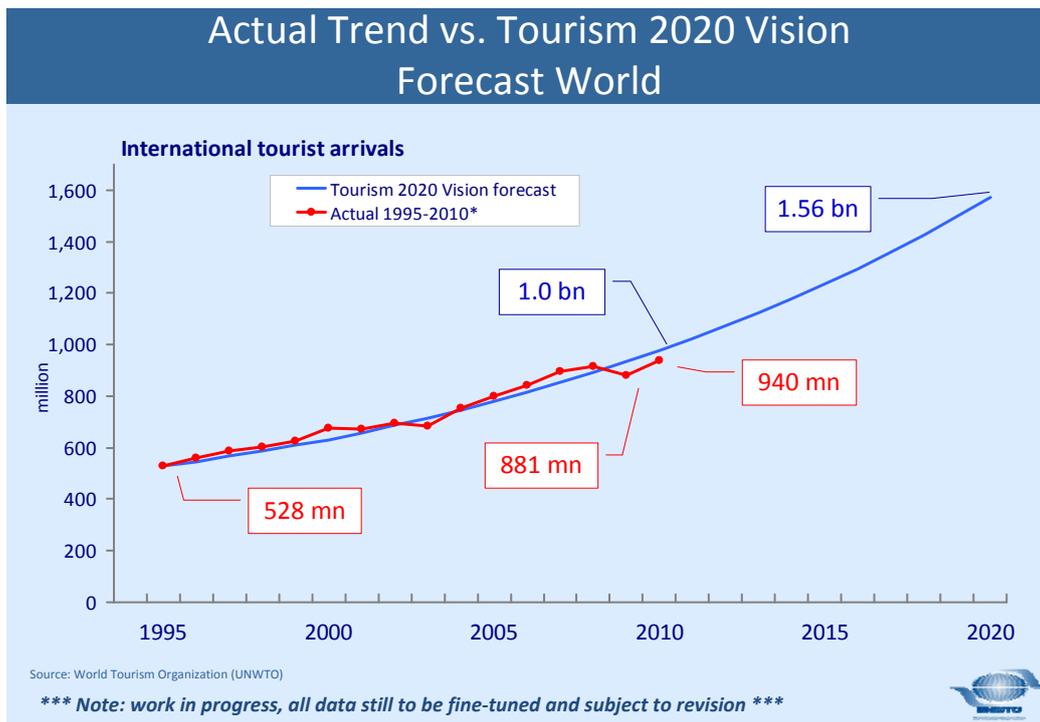
- Global Forecast
- 6 regional volumes



See: [www.unwto.org/pub](http://www.unwto.org/pub)

*\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\**





## Tourism Towards 2030

- A major, broad project in continuation with UNWTO work on long-term forecasting (update and extend 2020 Vision)
- Objectives:
  - assist members in formulating long-term strategy
  - provide a global reference on tourism future development
  - constitute the basis for UNWTO (strategic) documents
  - strengthen UNWTO's role as global tourism agenda setter

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*

## Quantitative forecast

### Basis

- data series on international tourist arrivals as reported by destination countries used as key indicator
  - only indicator with consistent long series for all (sub)regions (which is not the case for other series such as domestic arrivals, overnights, etc.)
  - series can be broken down by origin, means of transport and purpose of visit
  - economic data, like receipts, generally cannot be broken down and are difficult to project because of exchange rates and inflation

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



## Quantitative forecast

### Basis

- matrix with data series for 1980-2010 with 3 dimensions
  - 17 subregions of destination (5 of which can be broken down by advanced/emerging economies) => total 22
  - 5 regions of origin
  - 2 means of transport: air and surface
- therefore we end up forecasting some 140 individual flows and can present the results in a range of different ways:
  - by arrival (sub)region
  - by departure region
  - advanced vs. emerging economies
  - by surface vs. air transport
  - within regions vs. between regions
  - crossings of these

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



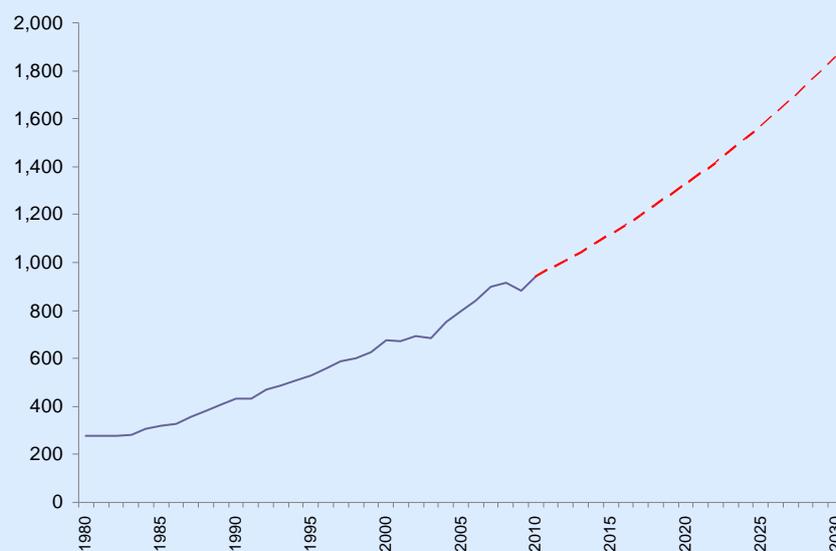
## Global arrivals

- Our models suggest that growth over the period 2010/2030 will average 3.0% to 3.5%pa from 4.2%pa in 1980 / 2010
- This suggests that arrivals will grow from 0.94bn in 2010 to 1.3-1.5bn by 2020 and then to 1.7-1.9bn by 2030
- The slowdown in rates of growth are due to :
  - Slightly slower GDP growth
  - A decline on the sensitivity of arrivals to GDP growth
  - A cessation in the declines in the cost of transport seen over the last 20 years, moving to increasing costs
- It is important to consider these forecasts in absolute terms, rather than just in terms of %pa increases!

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



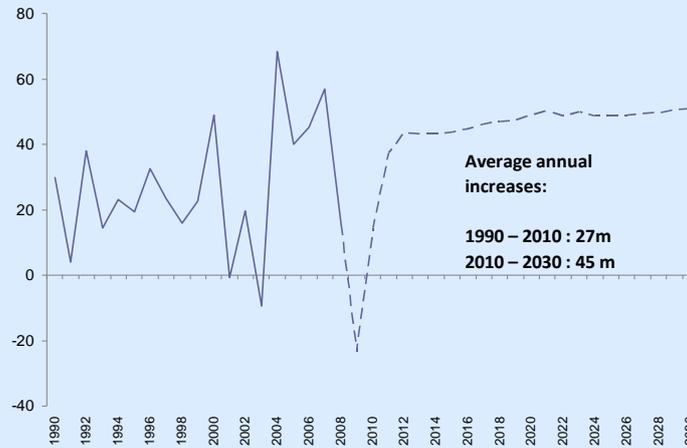
## Overall tourist arrivals (m)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



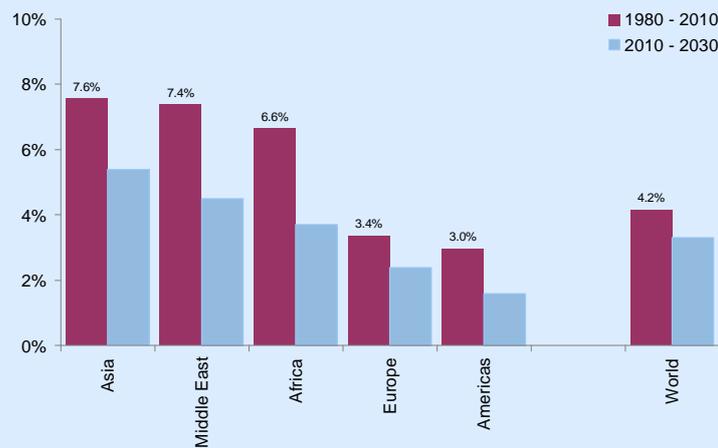
## Overall arrivals, increases per year (m)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



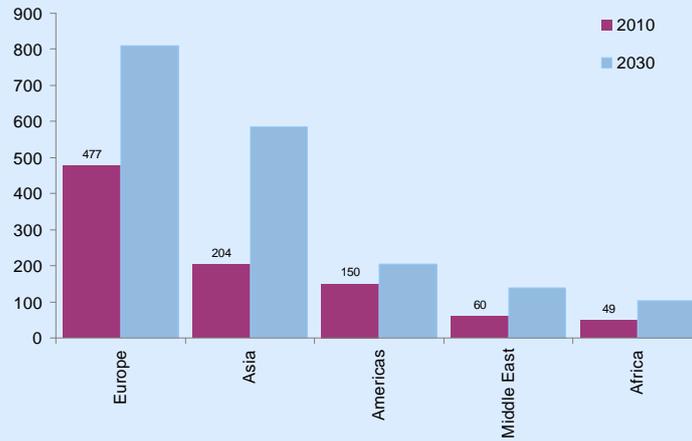
## Arrivals growth by region: 1980 – 2030 (%pa)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



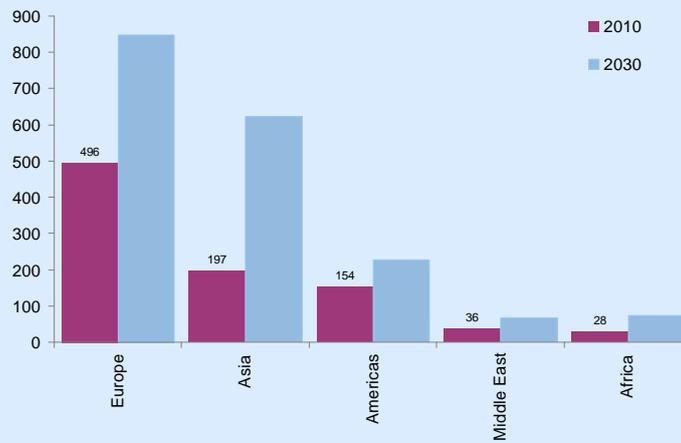
## Arrivals by region in absolute terms (m)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



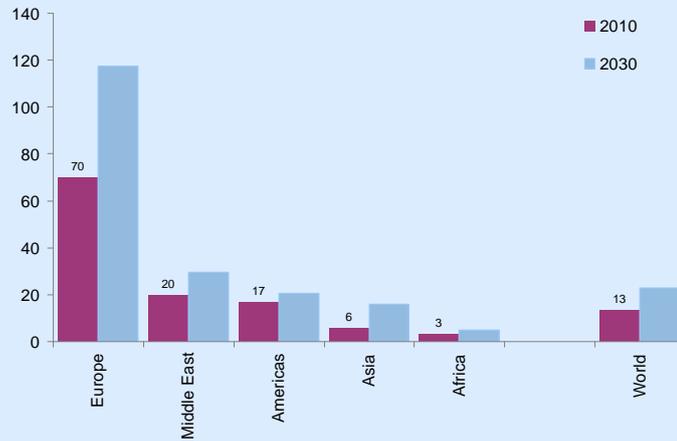
## ... and then departures by region (m)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



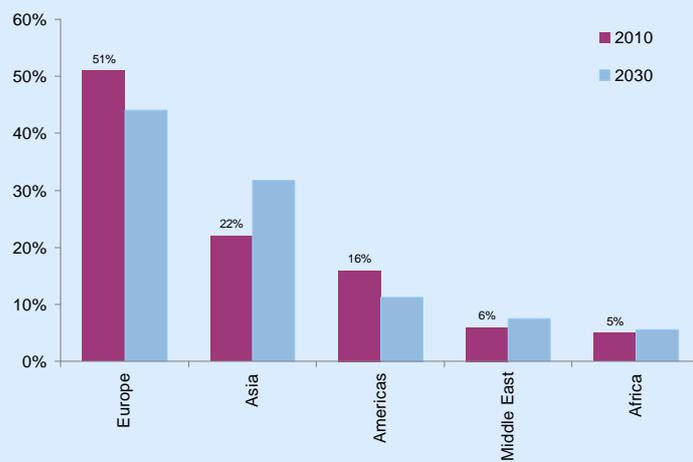
## What the forecasts imply in terms of departures per region (per 100 people)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*

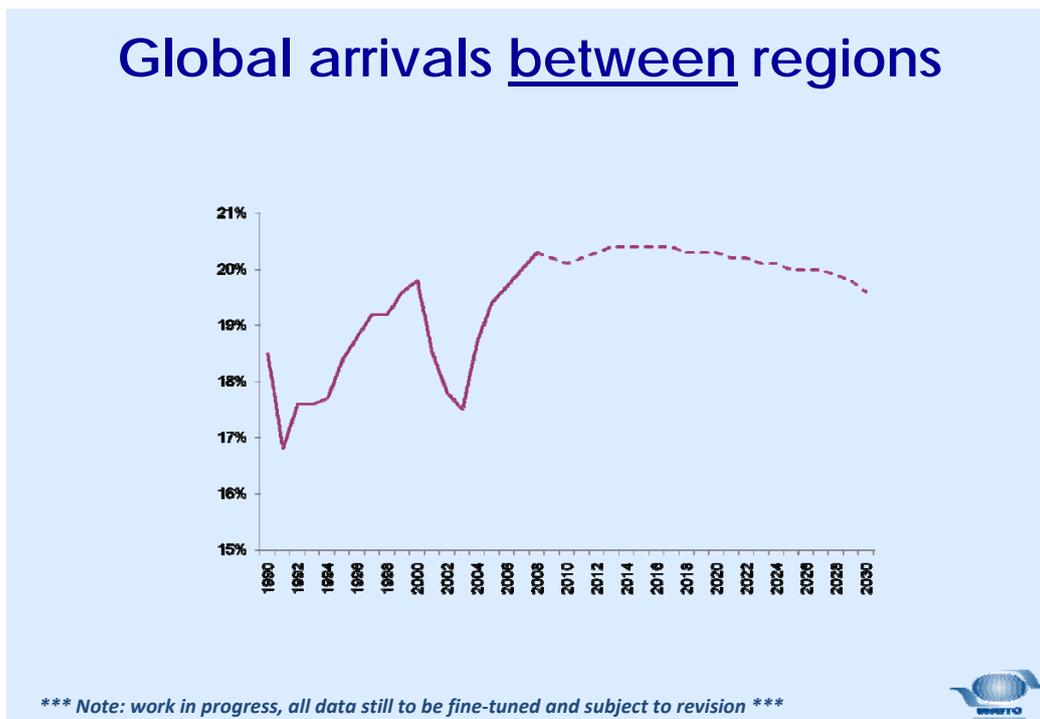
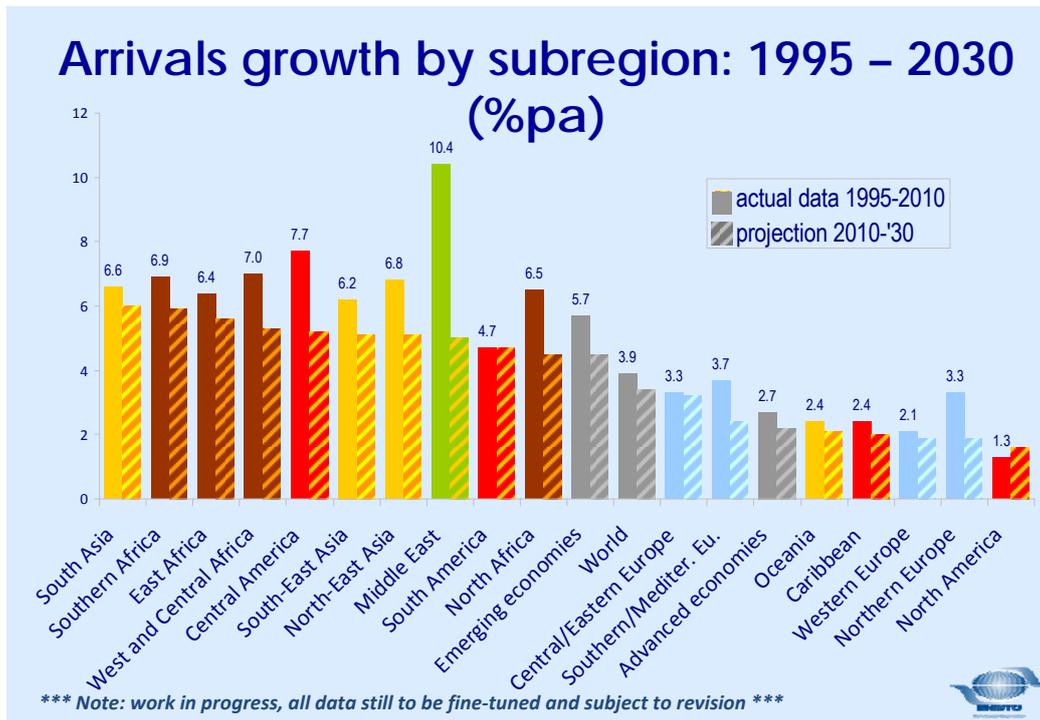


## Share of global arrivals by region

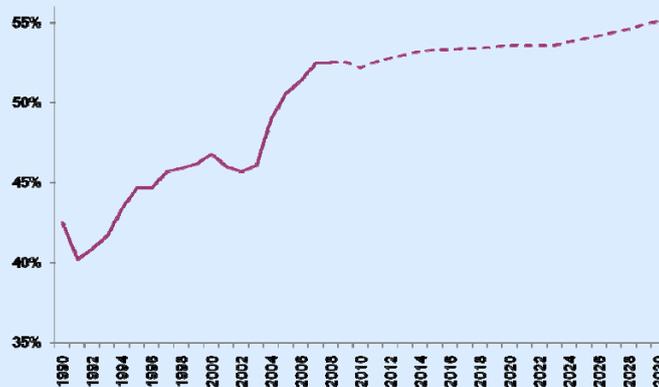


\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*





## Global departures by air



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



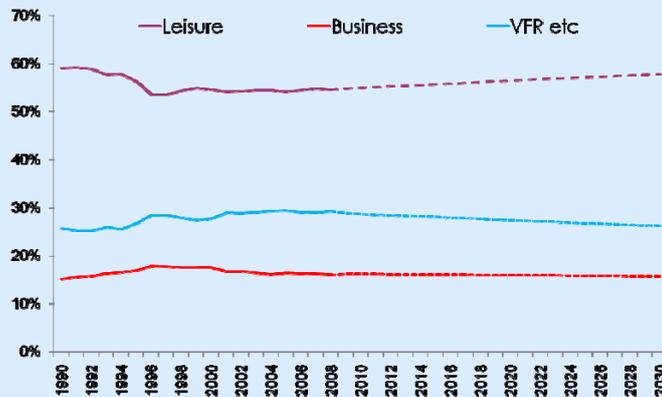
## Arrivals by purpose of visit

- Data on purpose of visit is only available for arrivals (and not for source markets)
- In most instances it is fairly difficult to build satisfactory behavioural models and they tend to be primarily driven by underlying trends
- In most instances though this satisfactorily explains the historical movements in share taken by each of the three purposes – leisure, business and VFR etc

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



## Arrivals by purpose of visit



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



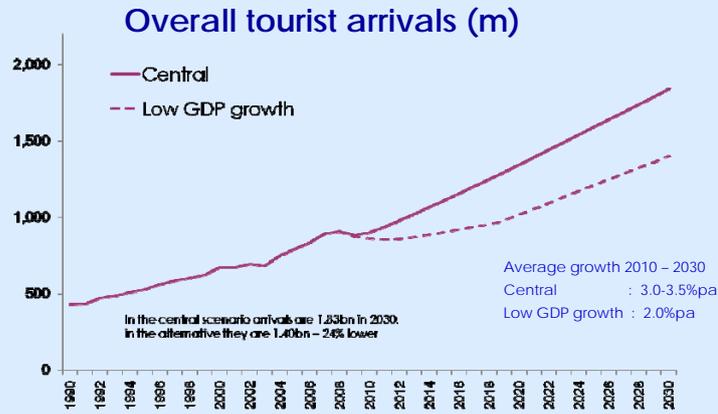
## Sensitivity Analysis

- In order to assess the sensitivity of the forecasts we have constructed three alternative scenarios and looked at the impact on the forecasts
- In each of these alternatives we have only changed one of the assumptions – thus allowing an assessment of the sensitivity of the numbers to that particular factor :
  - A more severe recession in the short term and then lower growth in global GDP into the medium term
  - For travel costs to increase at a faster rate than in the central projection
  - For travel costs to continue their decline – at a similar rate to that that has occurred over the past 20 years
- Clearly there are several hundred forecasts produced in each scenario, so a comprehensive comparison is not possible
- All we have done here is to assess the impact on overall global arrivals

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



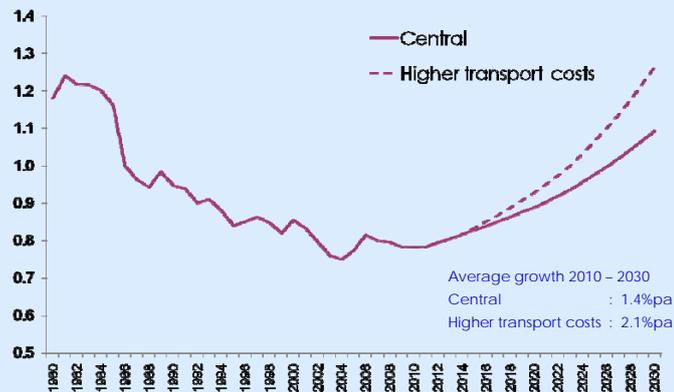
## Low GDP growth scenario



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



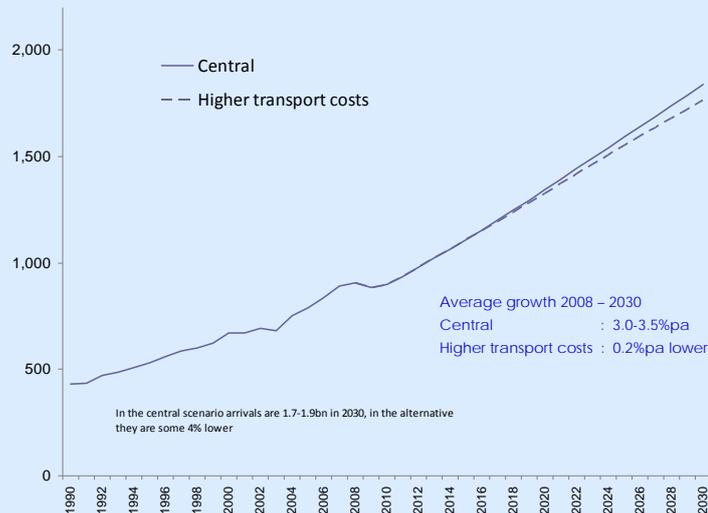
## Higher transport costs scenario The real cost of transport: 1986 = 1



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



## Overall tourist arrivals (m)



\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



## One-Page Tourism Towards 2030

- Global growth in international tourist arrivals to continue, but at a more moderate pace, from 4.2% per year (1980 – 2020) to 3.0-3.5% (2010 – 2030), as a result of four factors:
  - The base volumes are higher
  - Lower GDP growth
  - A lower elasticity of travel to GDP
  - A move from falling transport costs to increasing ones
- Asia and the Pacific, the Middle East and Africa will continue to increase their share of total arrivals, while Europe and the Americas will see a further decline
- In percentage terms the fastest growth in arrivals will be for North East Asia and South Asia, while the slowest for North America and the Caribbean
- Air transport will continue to grow its share of total trips, but at a slower rate than in recent years

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



# CONTENT

- **Looking back: past trends that have shaped tourism development**
  - Qualitative and quantitative trends of demand and supply
    - Economic, technological, demographic and social trends (economic development, service economy, globalisation, education, work and life-styles, consumer trends ...)
    - Political and business environment (focus on tourism policy)
    - Supply: destinations and industries such as transport, accommodation, attractions
    - Continuing differentiation and diversification of destinations, products, markets and segments (e.g. cultural, wellness, sport, city, rural, religious ...)
- **Looking forward: future trends**
  - Assumptions and model
  - Quantitative forecast
  - Qualitative trends to take into account
- **Opportunities and challenges**
  - Sustainability (social, economic and environment) > energy dependency, climate change adaptation and mitigation, congestion management, risk management
  - Socioeconomic > tourism as a tool for social and economic development and the reduction of poverty

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



**Thank you very much for your attention!**

**World Tourism  
Organization**

**[www.unwto.org](http://www.unwto.org)**

\*\*\* Note: work in progress, all data still to be fine-tuned and subject to revision \*\*\*



## Annex 2



### Open Letter to Heads of State and Government

Travel and Tourism is today one of the world's biggest generators of employment and export earnings, and a key driver for economic growth and development. Travel and Tourism currently accounts directly and indirectly for about 3% to 5% of global GDP, as well as 30% of the world's export of services. If the induced impacts of travel and tourism are factored into the calculations, its total contribution is greater still.

The total contribution of Travel & Tourism to employment – including jobs indirectly supported by the sector – is estimated at 7% to 8%. This makes Travel & Tourism a vital contributor to the global development agenda, affording it a unique role in building strong, sustainable and balanced global growth.

#### ***Travel and Tourism: Creating Jobs***

Through the creation of sustainable enterprises and decent jobs, Travel & Tourism provides the necessary security and stability for millions of people worldwide to build better lives. As a fast entry point into the workforce for young people and women, it provides crucial opportunities for fair income, social protection, gender equality, personal development and social inclusion.

#### ***Travel and Tourism: Enhancing Development***

Travel & Tourism is one of the major export sectors of developing countries and the primary source of foreign exchange earnings in the vast majority of these, creating much needed employment and opportunities for development. At the same time, it has the power to deliver significant international earnings for environmental protection, as well as giving economic value to cultural heritage. It is also a sector built on bringing people together, in order to learn about and understand each other, fostering mutual respect and tolerance.

#### ***Travel and Tourism: Supporting the 'Green Economy'***

As tourism activity continues to grow, Travel & Tourism is increasingly intertwined with environmental sustainability. Environmentally responsible tourism is one of the new growth poles of the 'green economy', providing sustainable infrastructure, business opportunities, jobs and income.

#### ***UNWTO and WTTTC: Joining Efforts to Maximise Travel & Tourism's Contribution to Economic Growth and Development***

The World Tourism Organization (UNWTO/OMT) is a specialised agency of the United Nations and the leading international organisation in the field of tourism. The World Travel & Tourism Council (WTTTC) is the global forum for business leaders in Travel & Tourism.

In light of this ongoing campaign, I would like to extend an invitation to H.E. ....xxx to join hands with other world leaders, as well as with UNWTO and WTTTC, and add his voice to our effort to position Travel and Tourism higher on the global agenda.

David Scowsill  
President & CEO  
World Travel and Tourism Council (WTTTC)

Taleb Rifai  
Secretary-General  
World Tourism Organization (UNWTO)