



Survey on Members' priorities for 2018-2019

Summary Report

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1. Introduction

1.1. Background

From November to December 2016, a survey on Members' priorities was conducted by the UNWTO Secretariat in order to prepare the Organization's General Programme of Work and Regular Budget for 2018-2019. A questionnaire was made available online for Full, Associate and Affiliate Members.

The survey was built around the two main strategic objectives of the Organization: Sustainability/Ethics and Competitiveness/Quality.

It is recalled that in 2016 and 2017, key priorities of the Organization were as follows:

- Promoting safe and seamless travel,
- Enhancing the role of technology in tourism, and
- Placing sustainability at the heart of tourism development and promoting the role of sustainable tourism in development

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

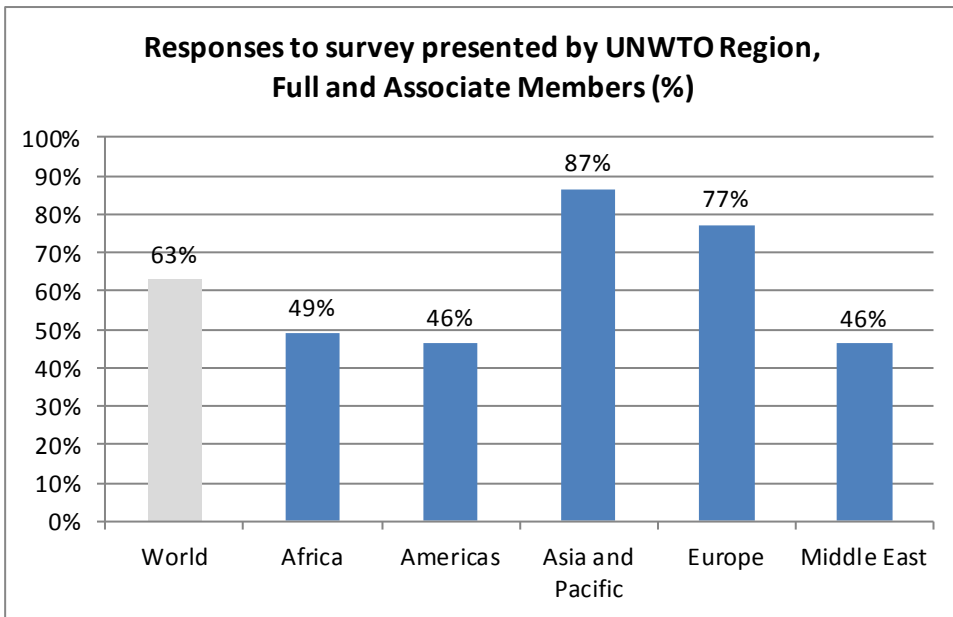
In addition, UNWTO consulted some regional and international institutions, which activities are linked with tourism. Five replied: Committee of the Regions of the European Union, Organization of American States (OAS), Pacific Asia Travel Association (PATA), United Nations Conference on Trade and Development (UNCTAD) and World Trade Organization (WTO). The results of this additional consultation will be taken into consideration by the Secretariat when drafting the programme of work document.

The Secretariat would like to seize the opportunity of the present report to thank all the persons involved in responding to the survey.

1.2. Level of response

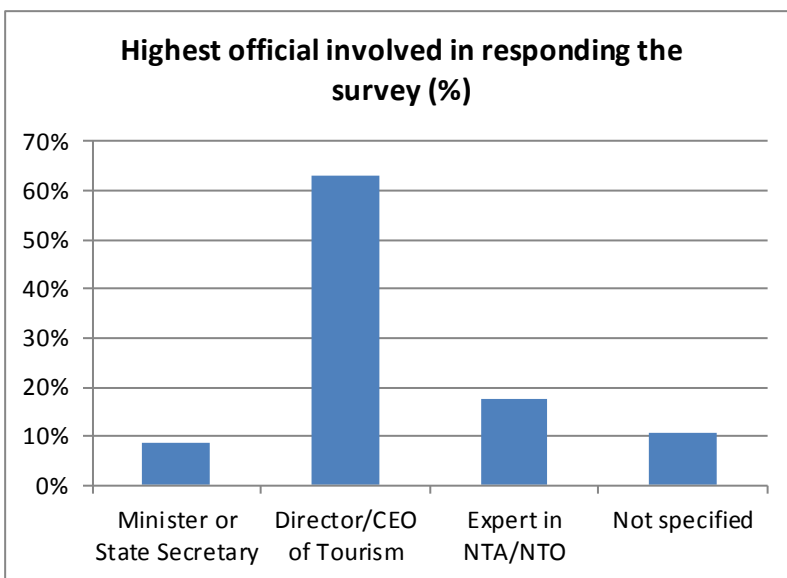
- ***Full and Associate Members***

The level of replies (63%, i.e., 100 Full Members and 3 Associate Members) is considered to be representative, with some disparities among regions as shown in the following graph.



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

Respondents were also requested to indicate their names and titles. The following graph shows the distribution of the highest officials involved in responding to the survey. Around 75% were of Director/Head level or above, other 15% or so being staff and experts in national tourism administrations (NTA) or organizations (NTO).



- ***Affiliate Members***

43 Affiliate Members answered the survey (a little bit less than 10%). The list of respondents is available in Annex II.

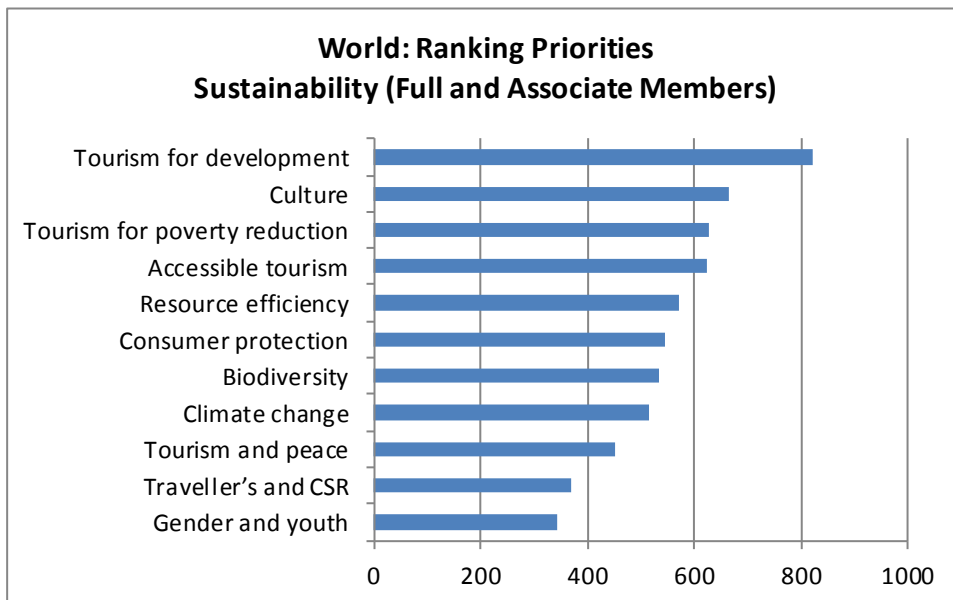
2. Sustainability and Ethics

2.1. Full and Associate Members' priorities

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

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism sustainability and ethics:
 - Accessible tourism
 - Biodiversity
 - Climate change
 - Consumer protection
 - Culture
 - Gender and youth issues
 - Resource efficiency: Energy, water and waste
 - Tourism and peace
 - Tourism for development
 - Tourism for poverty reduction
 - Traveller's and corporate social responsibility
- To formulate specific comments on any of the above areas of work, and to indicate any other area of work to consider.

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

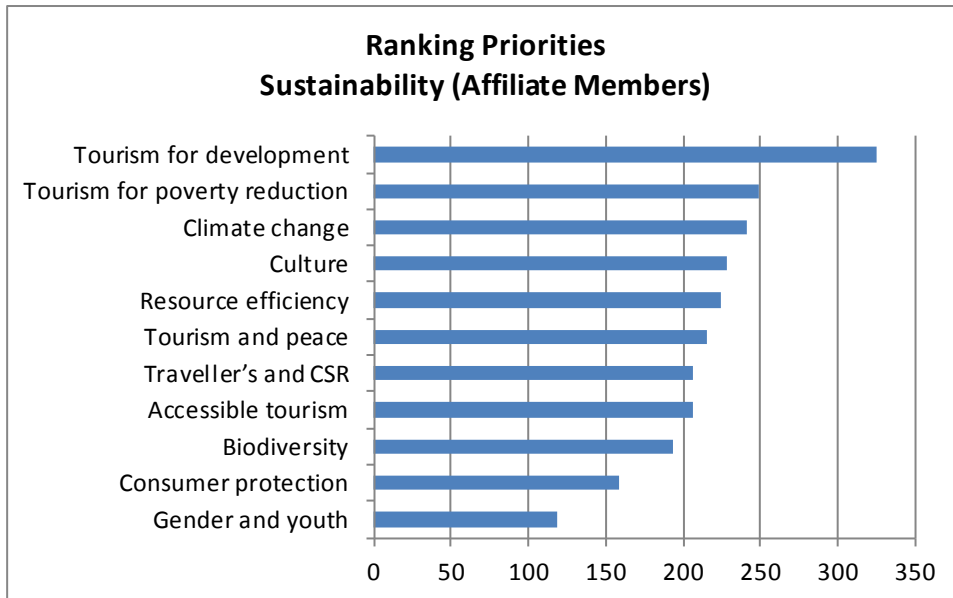


It is worth noting that 44 out of 103 Members rank "Tourism for Development" as first priority. For regional results, see **Annex III**.

Comments received regarding the different sustainability areas of work are summarized in part 2.3. below and will be used by the Secretariat when preparing specific activities in the coming biennium.

2.2. Affiliate Members' priorities

To the same survey, Affiliate Members answered as shown in the following graph:



2.3. Suggestions and comments by Members

In relation with sustainability and ethics, the additional comments and suggestions made by all Members can be summarized as follows:

- Focussing on specific areas of work: Eco, agro and rural tourism for the socio-economic support of local communities; Social tourism; Sustainability applied to specific tourism segments, such as cruise tourism.
- Harmonization with international standards (statistics, quality, etc.) and certification
- Support in tourism strategic planning, governance mechanisms (public-public and private-public) and improvement of tourism laws
- Taking into account the challenges of human rights and humanitarian crises
- Cooperation and partnership:
 - Cooperation with the UNESCO regarding the Man and the Biosphere Programme and heritage protection
 - Regional cooperation and partnership with regional development institutions
- Direct suggestions to the Secretariat on its operations:
 - The importance of gathering and disseminating best practices among UNWTO Members
 - The need for debate on sustainability issues in UNWTO statutory meetings

- The opportunity to use the International Year 2017 for prioritizing sustainability issues in UNWTO programme of work

3. Competitiveness and Quality

3.1. Full and Associate Members' priorities

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

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism Competitiveness and Quality:
 - Connectivity
 - Destination quality management
 - Domestic tourism
 - Human resource development, employment and entrepreneurship
 - Marketing/branding
 - Market trends
 - Safe, secure and seamless travel
 - Statistics
 - Taxation/investment
 - Technology
 - Trade policies
- To formulate specific comments on any of the above areas of work, and to indicate any other area of work.

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

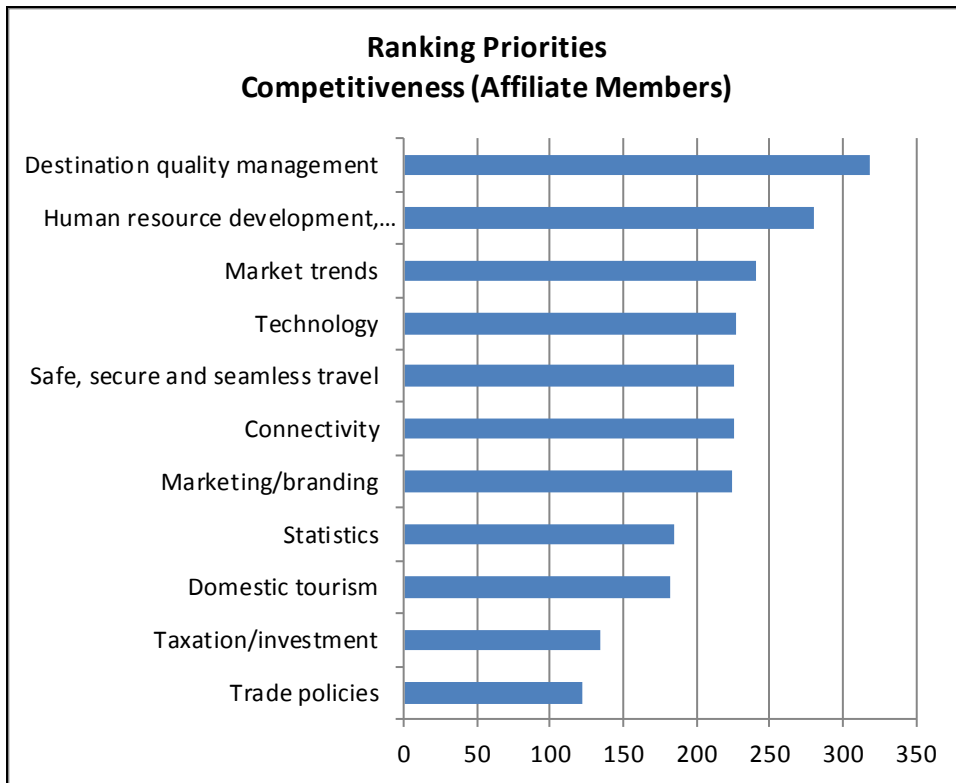


For regional results, see **Annex IV**.

Comments received regarding the different competitiveness areas of work are presented in part 3.3. below and will be used by the Secretariat when preparing specific activities in the coming biennium.

3.2. Affiliate Members' priorities

To the same survey, affiliate Members answered as shown in the following graph:



3.3. Suggestions and comments by Members

In relation with competitiveness, the additional comments and suggestions made by all Members can be summarized as follows:

- Focussing on diversification of, and innovation for, tourism product development
- Capacity-building for public and private tourism stakeholders, notably for young professionals and through webinars
- Supporting members in classifying tourism accommodation
- Exchanging case studies and lessons learnt among members
- Improving tourism law as a competitiveness factor of attraction for tourism investors
- Reinforcing regional cooperation
- Evaluating tourism promotional campaigns
- Considering air, ground and ICT infrastructures as a key competitiveness factor
- Learning more about the links between tourism and the so-called big data
- Researching on trends for specific segments, such as cruise or mountain tourism
- Connecting all competitiveness issues with the commitment towards more sustainability
- Supporting SME and foster business environment

4. Key Conclusions

- Participation: more than half of the Full and Associate Members replied to the survey. Similar to what happened 2 years ago during the same exercise and a very representative sample of this membership. Participation from Affiliate membership is more limited (around 10%), with however useful qualitative comments.
- Top priorities: For each pillar of the survey, the top five priorities are as follows:

- Sustainability and Ethics:

	Full and Associate Members	Affiliate Members
1.	Tourism for development	Tourism for development
2.	Culture	Tourism for poverty reduction
3.	Tourism for poverty reduction	Climate change
4.	Accessible tourism	Culture
5.	Resource efficiency	Resource efficiency

- Competitiveness and Quality:

	Full and Associate Members	Affiliate Members
1.	Destination quality management	Destination quality management
2.	Human resource development, employment and entrepreneurship	Human resource development, employment and entrepreneurship
3.	Marketing/branding	Market trends
4.	Connectivity	Technology
5.	Safe, secure and seamless travel	Safe, secure and seamless travel

- There are some disparities in priorities according to the regions. Please consult Annexes III and IV.
- The priorities expressed by Full and Associate Members, on one hand, and by Affiliate, Members on the other, appear as mostly aligned. This presents good opportunities for public-private cooperation between the different memberships.
- The strong commitment towards the concept of “tourism for development” shown by a large majority of members echoes the context of the International Year 2017. It further gives to the sector and the Organization a clear mandate to organize its work along the lines of the 2030 Agenda and the Sustainable Development Goals. This will be reflected in the Programme of Work document to be submitted to UNWTO governing bodies, like “Culture” was taken into consideration 2 years when it appeared as the main priority.
- For the first time, the Secretariat consulted with sister regional and international institutions. The level of replies was quite low (five) but the suggestions received will be of great help in preparing the next biennium.

- The Secretariat would like to seize the opportunity of the present report to thank all the persons involved in responding to the survey.
- The Secretariat, based on the results of the survey, will prepare a **draft Programme of Work and Budget for the biennium 2018-2019** to be submitted for comments to the 10th Programme and Budget Committee and the 105th Executive Council, and for approval to the 22nd General Assembly.



Annexes

Annex I: List of Full and Associate Members that responded to the survey

Africa

1. Angola
2. Botswana
3. Burkina Faso
4. Cameroon
5. Cape Verde
6. Côte d'Ivoire
7. DR Congo
8. Djibouti
9. Equatorial Guinea
10. Ethiopia
11. Gabon
12. Ghana
13. Kenya
14. Mali
15. Morocco
16. Senegal
17. Seychelles
18. Sierra Leone
19. Sudan
20. Swaziland
21. Tunisia
22. Uganda
23. Zambia
24. Zimbabwe

Americas

25. Bolivia
26. Brazil
27. Costa Rica
28. Cuba
29. El Salvador
30. Jamaica
31. Nicaragua
32. Panama
33. Paraguay
34. Peru
35. Uruguay
36. Venezuela

Associate Member

37. Puerto Rico

Asia

South Asia

38. Afghanistan
39. Bangladesh
40. Bhutan
41. Iran, Islamic Republic of
42. Maldives
43. Nepal
44. Pakistan
45. Sri Lanka

East Asia and the Pacific

46. Brunei Darussalam
47. Cambodia
48. China
49. Fiji
50. Indonesia
51. Japan
52. Lao PDR
53. Malaysia
54. Mongolia
55. Myanmar
56. Papua New Guinea
57. Philippines
58. Republic of Korea
59. Samoa
60. Thailand
61. Timor Leste
62. Viet Nam

Associate Member

63. Macao, China

Europe

64. Andorra
65. Austria
66. Azerbaijan
67. Belarus
68. Bosnia and Herzegovina
69. Bulgaria

70. Croatia

71. Cyprus

72. Czech Republic

73. France

74. Georgia

75. Greece

76. Hungary

77. Israel

78. Italy

79. Kazakhstan

80. Kyrgyzstan

81. Lithuania

82. Malta

83. Moldova, Republic of

84. Montenegro

85. Poland

86. Portugal

87. Russian Federation

88. San Marino

89. Serbia

90. Slovakia

91. Slovenia

92. Switzerland

93. Tajikistan

94. Turkey

95. Ukraine

Associate Members

96. Madeira

97. Flanders

Middle East

98. Egypt

99. Iraq

100. Kuwait

101. Lebanon

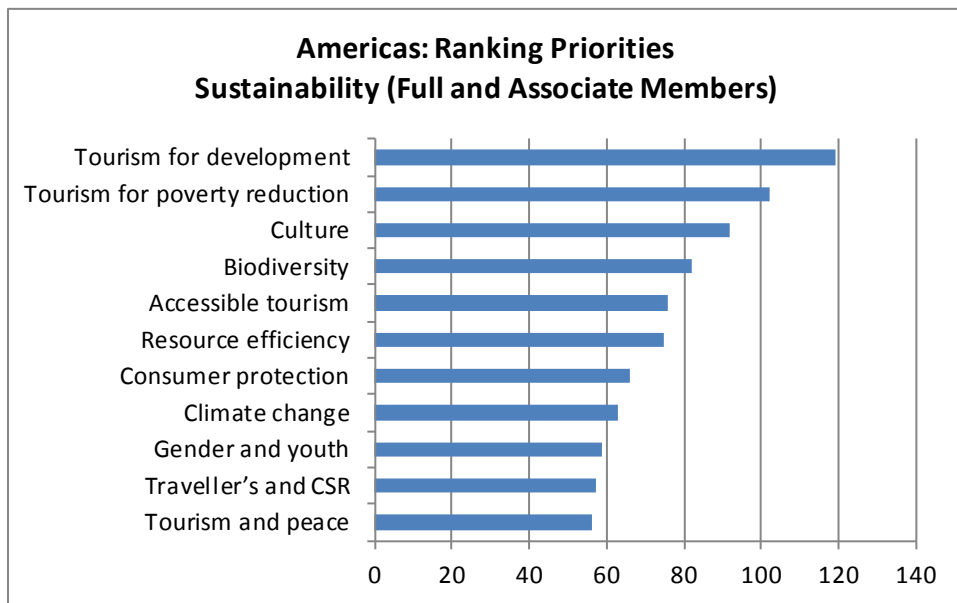
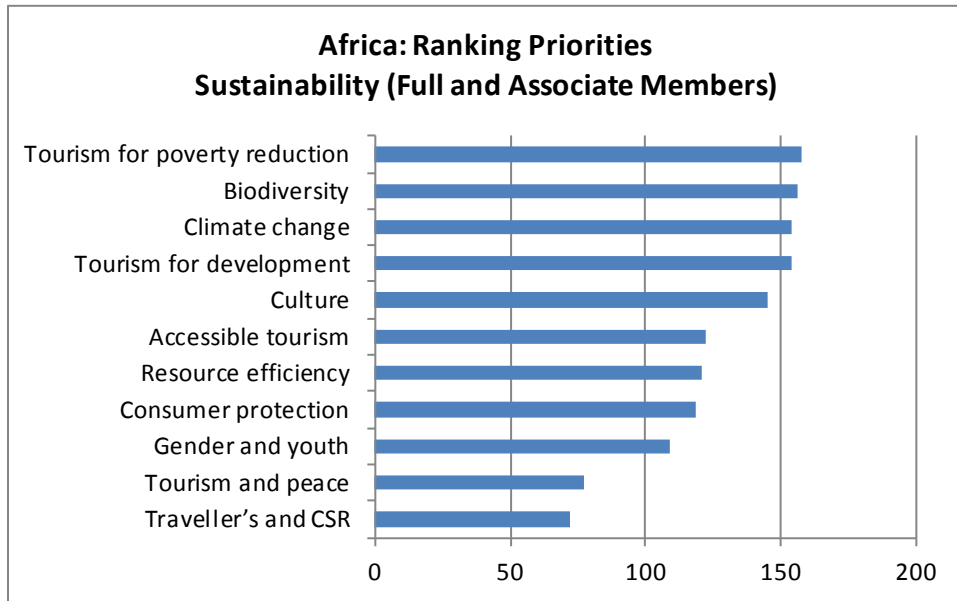
102. Saudi Arabia

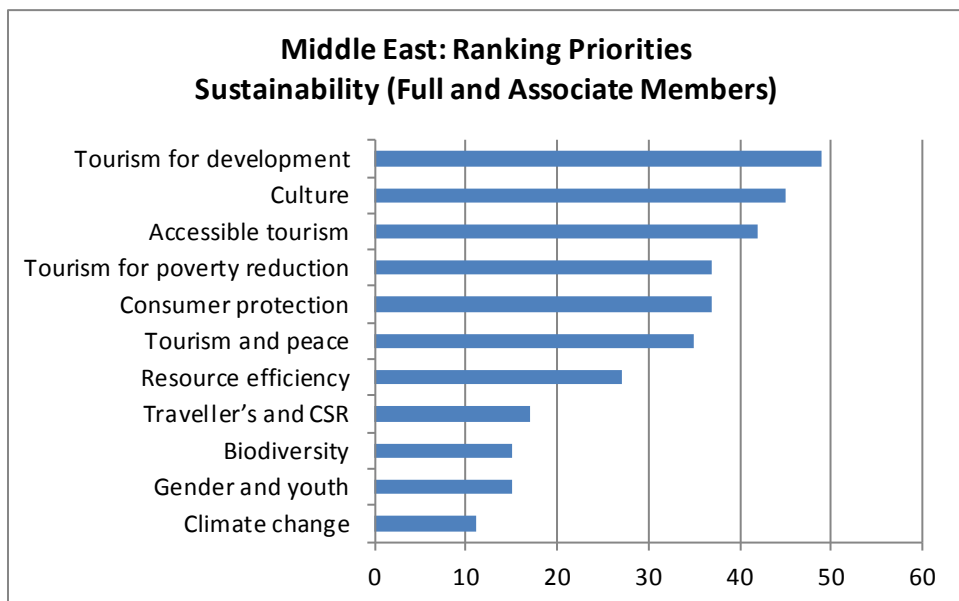
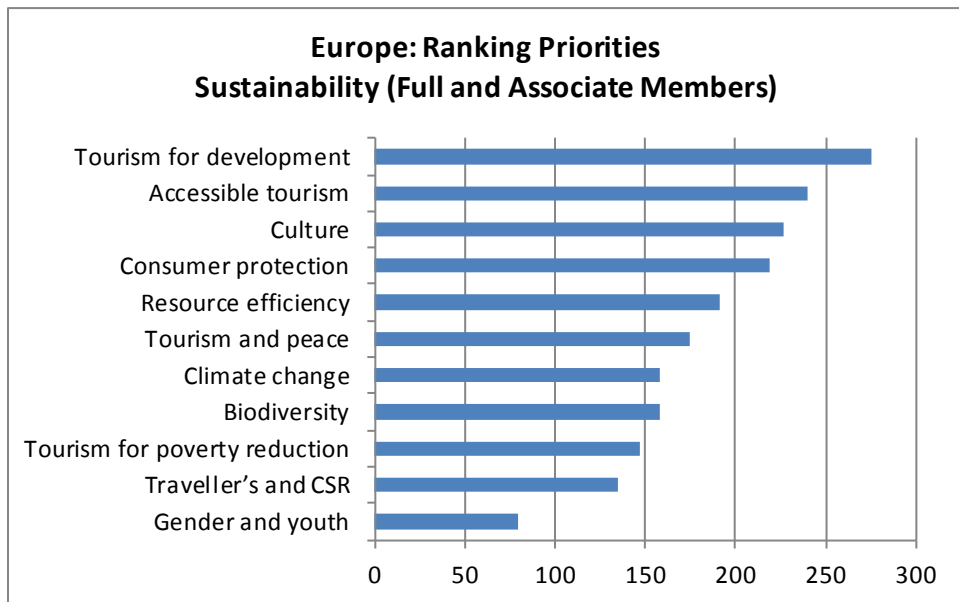
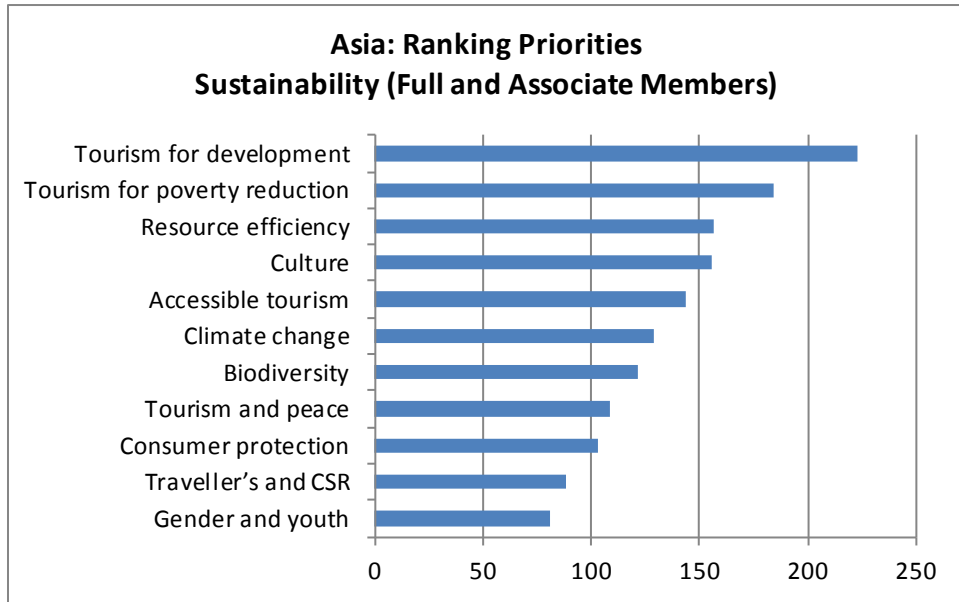
103. Yemen

Annex II: List of Affiliate Members that responded to the survey

1. AMFORHT - Association Mondiale pour la Formation Hoteliere et Touristique - World Association for Hospitality and Tourism Education
2. Bogazici University - Tourism Administration Dept.
3. Camara Argentina de Turismo
4. Cámara de Comercio de Bogotá
5. Chemonics International Inc.
6. Concorde de Luxe Resort
7. Cork Forest Conservation Alliance/CFCA
8. Discoverymice
9. Ernst & Young LLP
10. Facultad de Historia, Geografía y Turismo de la Universidad del Salvador
11. Fundación Universitaria CAFAM
12. Global Sustainable Tourism Council
13. Horwath HTL
14. HOTREC, Hotels, Restaurants & Cafés in Europe
15. ICF SH&E, INC.
16. Institute for Tourism
17. Instituto de Planeamento e Desenvolvimento do Turismo (IPDT)
18. Interface Tourism / Travel Consul
19. International Air Transport Association (IATA)
20. International Hotel and Restaurant Association IH&RA
21. International University of Applied Sciences Bad Honnef-Bonn (IUBH)
22. International Youth Hostel Federation (IYHF) / Hostelling International
23. Iranian Tourism Scientific Association (ITSA)
24. Japan National Tourism Organization (JNTO)
25. KALAM
26. Lucerne University of Applied Sciences and Arts - Institute of Tourism
27. Madison
28. MAPFRE S.A.
29. Messe Berlin GmbH
30. Modul University Vienna
31. NH Hoteles
32. Organisation Internationale du Tourisme Social (OITS)
33. PromoTurismoFVG
34. Roteiros de Charme Hotel Association
35. School of Business Administration Turiba
36. Shoin University
37. Touring & Automobile Club of Iran
38. Universidad de San Martín de Porres - Escuela Profesional de Turismo y Hotelería
39. Universitat de Valencia
40. Université du Québec à Montréal
41. WESGRO
42. World Federation of Tourist Guide Associations

Annex III: Sustainability issues, ranking areas of activity by region





Annex IV: Competitiveness and Quality, ranking areas of activity by region

