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G20 BALI GUIDELINES FOR STRENGTHENING COMMUNITIES AND MSMEs AS TOURISM TRANSFORMATION AGENTS

A PEOPLE-CENTRED RECOVERY

ANNEX TO THE CHAIR'S SUMMARY



G20
INDONESIA
2022



UNWTO
World Tourism Organization



G20 BALI GUIDELINES FOR STRENGTHENING COMMUNITIES AND MSMEs AS TOURISM TRANSFORMATION AGENTS

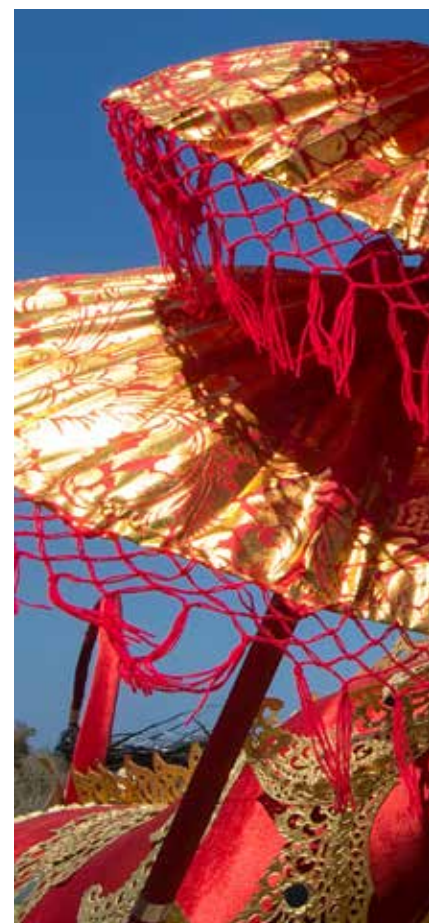
A PEOPLE-CENTRED RECOVERY

ANNEX TO THE CHAIR'S SUMMARY

Final version, 26 September 2022



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MESSAGE

**ZURAB POLOLIKASHVILI,
SECRETARY-GENERAL,
WORLD TOURISM ORGANIZATION (UNWTO)**



At the request of the Indonesian G20 Presidency, the World Tourism Organization (UNWTO) developed, in coordination and consultation with the G20 Tourism Working Group, the *G20 Bali Guidelines for Strengthening Communities and MSMEs as Tourism Transformation Agents – A People-centred Recovery*.

The Guidelines build on the G20 Tourism Working Group's efforts in the past two years: starting with the G20 Guidelines for *Inclusive Community Development through Tourism* and the *Guidelines for Action on Safe and Seamless Travel* endorsed by the G20 Tourism Ministers' Meetings in 2020 under the Saudi Presidency, along with the more recent *G20 Rome Guidelines for the Future of Tourism*, as well as the *Principles for the Transition to a Green Travel and Tourism Economy* which were endorsed and welcomed, respectively, by the G20 Tourism Ministers' Meeting of 2021 under the Italian Presidency.

The present guidelines further elaborate on the work of UNWTO to mitigate the impact of COVID-19 on tourism and to support recovery by putting women's empowerment Centre Stage, addressing the sociocultural impacts of the pandemic, accelerating sustainable and green transitions, promoting education and skills development, and advancing digitalization in tourism while taking into account different national circumstances.

The guidelines include references to other G20 workstreams, highlight examples from G20 and guest countries and include possible concrete actions to be undertaken by the G20 countries and other relevant stakeholders as per request of the Indonesian Presidency. A full set of case studies as provided by G20 and guest countries is also included in the report.

We would like to express our sincere gratitude to all G20 and guest countries for their contributions through the survey prepared for the purpose of developing these guidelines, as well as the revisions of the consecutive drafts. We also thank all the international organizations taking part in the Tourism Working Group under the G20 Indonesia Presidency for their valuable input and trust this document will guide the G20 into advancing the contribution of tourism into a more inclusive sustainable and resilient tourism sector and the achievement of the 2030 Agenda.

MESSAGE

**SANDIAGA SALAHUDDIN UNO,
MINISTER OF TOURISM AND CREATIVE
ECONOMY, REPUBLIC OF INDONESIA**

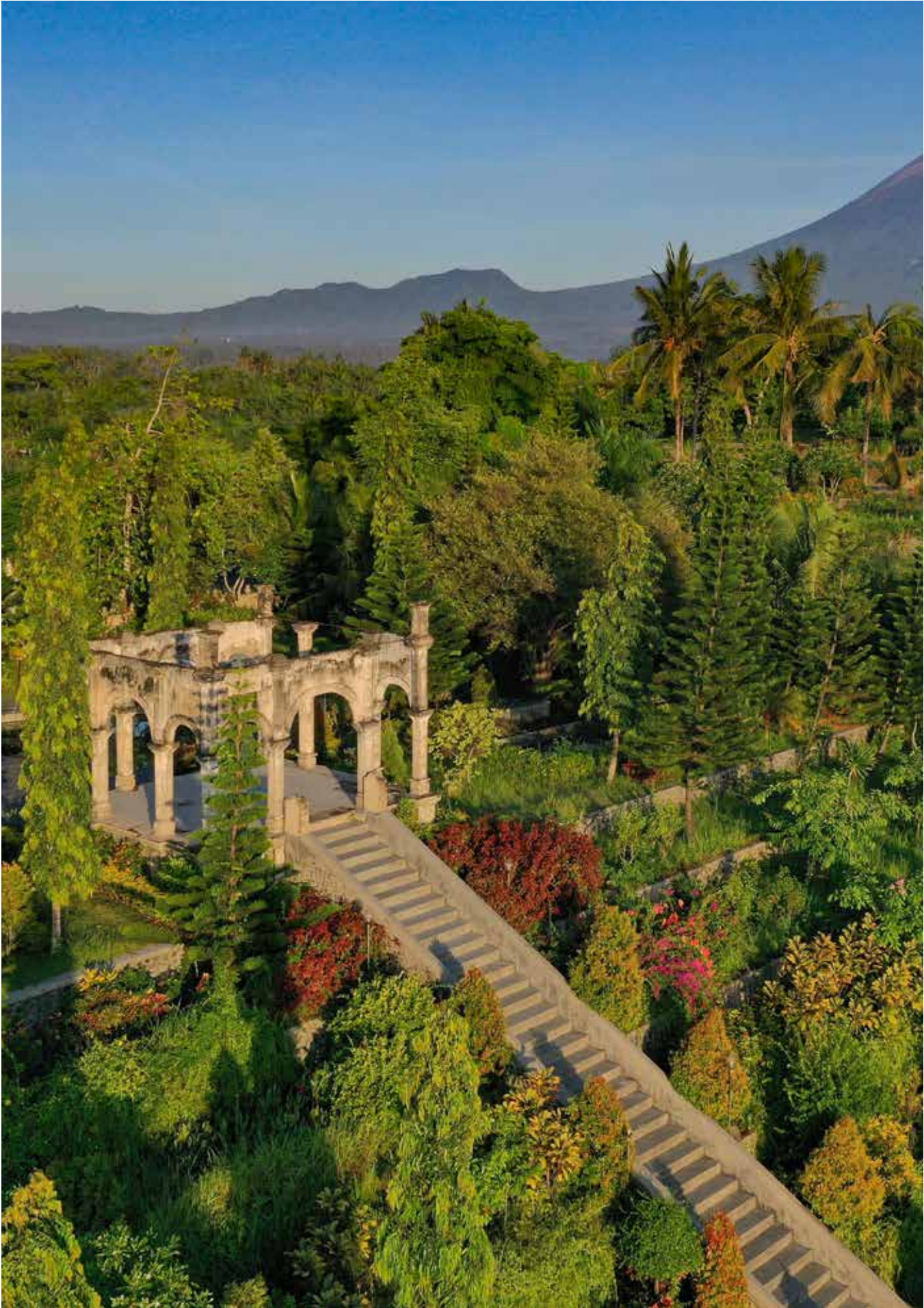


International tourism continues to demonstrate steady post Covid-19 recovery. In the first five months of 2022, the number of international arrivals increased by threefold compared to the year before. Nevertheless, we should not be complacent because international arrivals remain less than half of the pre-pandemic level. Moreover, growing headwinds loom large as geopolitical instability, soaring inflation, food and energy crises could possibly jeopardize tourism recovery. With these potential hurdles it is all the more critical for all countries to work hand in hand to reinvigorate tourism. Afterall, tourism is a major engine of the global economy that was among the hardest hit by the pandemic – without the revival of tourism we cannot recover together nor recover stronger.

Against such backdrop, I am truly delighted that the G20 Tourism Working Group is able to adopt the *G20 Bali Guidelines for Strengthening Communities and MSMEs as Tourism Transformation Agents – A People-centred Recovery*. The Guidelines embody a number of policy best practices in the five main lines of actions including human capital: jobs, skills, entrepreneurship and education; innovation, digitalization and creative economy; women and youth empowerment; climate action, biodiversity conservation and circular economy; and policy, governance and investment frameworks. These lines of actions are essential to put the holistic wellbeing of our people at the heart of tourism recovery. We do not wish for tourism to just simply rebound, we need it to be better in serving the needs of our communities by creating good jobs, empowering the marginalized and safeguarding our planet, which our guidelines aim for.

I wish to extend my utmost appreciation to all partners who make these Guidelines possible. Particularly, I wish to commend all of the G20 members for graciously sharing their policy insights for the Guidelines. I also earnestly applaud UNWTO as the key institutional partner of our G20 presidency for steadfastly working together with us to continuously improve the Guidelines. Last but not least, I wish to thank Indonesia's G20 presidency team for their hard work over the past year to coordinate the refining of the Guidelines.

It is my sincere hope that our work does not stop with the adoption of the Bali Guidelines. What is more important than the Guidelines is to ensure that they will lead to greater collaborative endeavour, not just to restore tourism to the way it was before the pandemic but to uplift it even higher, to be more resilient, inclusive and sustainable in the future. And I believe, with our shared good will, the Bali Guidelines will take us there.



INTRODUCTION

“Building on the work made in 2020, we will continue to support a rapid, resilient, inclusive, and sustainable recovery of the tourism sector, which is among those hardest hit by the pandemic, with a particular focus on developing countries and MSMEs. We endorse the G20 Rome Guidelines for the Future of Tourism and commit to taking action to fulfil its objectives, in particular with regard to safe mobility and seamless travel and sustainability, and digitalization. We will explore collaboration in the fields of creative economy and innovation in support of tourism.”

G20 Rome Leaders Declaration

“It is imperative that we rebuild the tourism sector in a safe, equitable and climate-friendly manner.”

António Guterres, Secretary-General, United Nations¹

“This crisis is an opportunity to rethink the tourism sector and its contribution to the people and planet; an opportunity to build back better towards a more sustainable, inclusive and resilient tourism sector that ensures the benefits of tourism are enjoyed widely and fairly.”

Zurab Pololikashvili, Secretary-General, World Tourism Organization (UNWTO)

¹ United Nations (2020/b), *Policy Brief: COVID-19 and Transforming Tourism*, online available at: <https://www.un.org/en/coronavirus/UN-response> [08-08-2022].



FROM CRISIS ...

Tourism was one of the economic sectors most impacted by the COVID-19 pandemic. In 2020, international tourist arrivals dropped by 71% amid widespread travel restrictions, bringing international tourism back to the level of 30 years ago.²

The economic contribution of tourism, which amounted to USD 3.5 trillion in 2019, or 4% of world GDP, measured in tourism direct gross domestic product (TDGDP) was cut by more than half in 2020, plunging by USD 1.8 trillion.³ Millions of jobs disappeared or were supported by government employment schemes. The crisis impacted particularly women; youth; micro-, small, and medium-sized enterprises (MSMEs); and the informal sector.

Other related sectors were also strongly affected, namely the cultural and the creative sectors (CCS). According to UNESCO, in 2020, there was a 66% drop in site visitations and a 52% decline in revenues at surveyed sites. OECD projected that, along with tourism, cultural and creative sectors were among the most affected, with jobs at risk

ranging from 0.8% to 5.5% of employment across OECD regions.⁴

While vaccine equity remains a major challenge, the progress made on vaccination, alongside increased coordination among governments, resulted in the easing of travel restrictions and rising consumer confidence in 2021. As a result, international tourist arrivals grew by 4% as compared to 2020 and the economic contribution of tourism (measured in tourism direct gross domestic product) rose slightly from USD 1.7 trillion to USD 2.2 trillion, much sustained by domestic tourism, yet still well below the pre-pandemic value of USD 3.5 trillion.⁵

Looking ahead, important downside risks may affect the pace of recovery. The deterioration of the economic situation, aggravated by geopolitical tensions, high energy prices, food insecurity, record inflation levels and hiking interest rates risk impacting on households spending and operational conditions of companies, particularly MSMEs.

2 World Tourism Organization (2022/c), *UNWTO World Tourism Barometer*, volume 20, issue 3, May 2022, UNWTO, Madrid, DOI: <https://doi.org/10.18111/wtobarometereng>.

3 World Tourism Organization (n.d./b), 'Impact assessment of the COVID-19 outbreak on international tourism', online available at: www.unwto.org [08-08-2022].
Updated internally by UNWTO on 15 August 2022.

4 Organisation for Economic Co-operation and Development (2020), 'Culture shock: COVID-19 and the cultural and creative sectors', OECD policy responses, online available at: <https://www.oecd.org/coronavirus/en/policy-responses> [08-08-2022].

5 World Tourism Organization (2022/e), *UNWTO World Tourism Barometer*, volume 20, issue 5, September 2022, UNWTO, Madrid, DOI: <https://doi.org/10.18111/wtobarometereng>.



... TO TRANSFORMATION

Prior to COVID-19, the tourism sector recorded continuous growth over decades, creating significant benefits – both direct and indirect – in terms of socioeconomic development and employment. Yet, this growth also brought important challenges related to the carrying capacity of destinations, impact on natural and cultural resources, on the social structures of communities, climate change, employment quality, as well as a fair distribution of income generated by the sector.

Furthermore, the crisis has exposed the vulnerability of the sector, with incidence on MSMEs and local communities, as well as women, youth and informal workers.

But, as per the UN Secretary-General *Policy Brief: COVID-19 and Transforming Tourism*, “while sustaining the livelihoods dependent on the sector must be a priority, rebuilding tourism is also an opportunity for transformation with a focus on leveraging its impact on destinations and building more resilient communities and businesses through innovation, digitalization, sustainability, shared responsibilities and partnerships.”⁶

The pandemic has demonstrated yet again, that unsustainable practices have to be urgently addressed. The underlying factors of biodiversity loss and climate change are the same that drive the emergence of pandemics and require that the relationship between people and nature be re-assessed.⁷

As travel restrictions are gradually lifted and the sector advances its recovery, there is an opportunity to leverage the acceleration of digitalization, the growth of the cultural and creative sectors, and the greater demand of consumers for sustainable experiences, ethical business practices and a direct interaction with communities. All these trends can lead to lower visitation density, more diversified and higher value tourism developments, as well as a more equal distribution of benefits from tourism.

Translating these trends and opportunities into inclusion and resilience within local communities and among MSMEs can accelerate the transition of the sector towards a real future transformation. Yet, such transition to more sustainable models of tourism will require coordinated policies across levels of government together with the private sector.⁸

6 United Nations (2020/b).

7 Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services – IPBES (2020), *Workshop Report on Biodiversity and Pandemics of the Intergovernmental Platform on Biodiversity and Ecosystem Services*, IPBES secretariat, Bonn, DOI: [10.5281/zenodo.4147317](https://doi.org/10.5281/zenodo.4147317) and online available at: <https://ipbes.net/pandemics> [12-08-2022].

8 Organisation for Economic Co-operation and Development (2021/a), ‘G20 Rome guidelines for the future of tourism: OECD Report to G20 Tourism Working Group’, *OECD Tourism Papers*, 2021/03, OECD Publishing, Paris, DOI: <http://dx.doi.org/10.1787/d11080db-en>.

Organisation for Economic Co-operation and Development (2021/b), ‘Managing tourism development for sustainable and inclusive recovery’, *OECD Tourism Papers*, 2021/01, OECD Publishing, Paris, DOI: <http://dx.doi.org/10.1787/b062f603-en>.

01 AIMS AND SCOPE



MSMEs are the backbone of the tourism sector, accounting for an estimated 80% of all tourism businesses worldwide and reaching as much as 98% in some G20 economies, as concluded in the survey conducted for the purpose of the current guidelines.

At the same time, the pandemic has exposed their vulnerability and that of local communities for whom tourism is an important pillar of livelihoods, inclusion, as well as a driver for the conservation of natural and cultural resources.

Faced with challenges of sustainability, human capital and digitalization, the transitions of tourism to a more sustainable and inclusive model, and the progress of its contribution to the Sustainable Development Goals (SDGs) cannot be achieved without advancing the transformation of MSMEs and communities.

The *G20 Bali Guidelines: Strengthening Communities and MSME as Tourism Transformation Agents – A People-centred Recovery* aim to provide a framework to advance the transformation of the tourism sector through policy action on MSMEs and communities.

The guidelines are steered by the theme of the Indonesian G20 Presidency 'Recover Together, Recover Stronger' and its three priority issues:

1. Global health architecture;
2. Digital transformation; and
3. Sustainable energy transition.

They aim to provide guidance on key policies and practices to create more resilient and sustainable communities and MSMEs in the aftermath of the COVID-19 pandemic and in the context of the climate change, biodiversity loss and pollution challenges, rising social, economic and territorial inequalities, digitalization and the current global economic challenges.

The guidelines have been informed by the extensive desk research, as well as a survey conducted among G20 and Guest countries. The survey focussed on:

- **The impact of COVID-19 on tourism** globally and in the G20 economies;
- **Policy responses of G20 and guest countries to mitigate the impact of COVID-19** on tourism, particularly on communities and MSMEs;
- **Challenges and priorities for recovery and resilience** globally, and specifically for MSMEs and communities; and
- **Case studies** on how **MSMEs and communities** have adapted during the pandemic and beyond.

Within this context, the guidelines are built around five pillars of action:

Pillar 1: Human capital: jobs, skills, entrepreneurship and education

Looking into market needs, talent management, education and skills development, as well as policies and practices to create new and added-value jobs, considering that the strengthening of human capital is key to increase productivity and to promote decent work⁹ opportunities for all in the tourism sector to enable the sector to better respond to the changing requirements.

Pillar 2: Innovation, digitalization and the creative economy

Focussing on how to spur innovation in local communities, create the infrastructure and develop the necessary skills for digitalization, as well as linking urban and rural territories. This line of action is also aimed at making the creative economy a driver of a more diversified tourism value chain, increase the competitiveness of MSMEs, the attractiveness of destinations and their overall (cultural and tourism) branding.

Pillar 3: Women and youth empowerment

With a special focus on the actions necessary to create decent jobs for women and youth, who are the backbone of the industry, as well as to empower them and promote their role in local communities as policy or business champions, entrepreneurs, workers and innovators. The objective of this segment is also to harness the critical role of education and skills to promote the full inclusion of both groups, which is critical to the future resilience of local communities worldwide.

Pillar 4: Climate action, biodiversity conservation and circularity

Focussing on the transitions to a more sustainable tourism model and progress towards achieving the Paris Agreement goals. Addressing tourism's use of energy, land, water and food resources and reducing greenhouse gas (GHG) emissions, biodiversity loss and waste.

Pillar 5: Policy, governance and investment frameworks

Focussing on the need to create holistic tourism policies and measures, investment conditions and adequate governance models that support the areas mentioned above taking into account national circumstances, needs and priorities.

HOW TO USE THE GUIDELINES

For each of the five pillars mentioned above, the guidelines include four elements:

1. An assessment of the challenges and opportunities both in the short and medium/long term;
2. A set of guidelines for G20 and guest countries;
3. Links to other G20 workstreams; and
4. Proposed concrete actions to be considered by G20 countries on a voluntary basis as per the vision of the Presidency. These actions are proposals for common initiatives which can be embraced by a group of G20 countries or by G20 countries and international organizations.

The below table provides an overview of the guidelines, as well as the proposed concrete actions and links to G20 workstreams.

⁹ The International Labour Organization (ILO) defines decent work as "productive work for women and men in conditions of freedom, equity, security and human dignity". https://www.ilo.org/wcmsp5/groups/public/---dgreports/---exrel/documents/publication/wcms_172612.pdf.

Table 1.1: Summary of guidelines, proposed concrete actions and link to G20 workstreams

GUIDELINES	PROPOSED CONCRETE ACTIONS	LINK TO G20 WORKSTREAMS
PILLAR 1: HUMAN CAPITAL: JOBS, SKILLS, ENTREPRENEURSHIP AND EDUCATION		
<ol style="list-style-type: none"> 1. Improve the current situation in the collection of disaggregated data and the analysis of the tourism labour market. 2. Support tourism MSMEs recovery and resilience with specific programmes. 3. Enhance the linkages to other sectors along the tourism value chain and reduce leakages. 4. Promote active policies and initiatives that stimulate entrepreneurship. 5. Promote access to universal, adequate, gender sensitive and sustainable social protection, fair wages, decent working conditions, occupational safety and health, and protect all workers against violence and harassment and advance the transition towards formality, within existing international and national legal frameworks. 6. Enable new skilling (skills acquisition), upskilling and reskilling for workers throughout their working lives. 7. Maximize the use of digital tools in education and skills development, and support tourism practitioners with the necessary certified digital learning tools to foster recognition of prior learning in order to ease the re-entry into the job market, especially for those with informal work histories. 8. Promote the development of multi-stakeholder partnerships in building a new approach to education and training in tourism. 9. Encourage the industry-led engagement in the update of competency standards and curricula as well as national mechanisms to drive tourism skills policy and develop campaigns that value employment in tourism, attract and retain talent. 10. Promote the creation and skills development for sustainable jobs. 	<ol style="list-style-type: none"> 1. Evaluate the creation of a voluntary G20 Tourism Exchange Programme promoting internships across G20 countries coordinated by educational institutions and the Ministries of/with a portfolio of tourism according to the capabilities, laws and regulations enacted in participating countries. 2. Promote and expand existing online training such as the UNWTO Tourism Online Academy as a global aggregator of online training for tourism.^a 	<p>Development Working Group: Particularly on its first priority issue of 'Strengthening Recovery and Resilience to Withstand Future Crises' upon which the DWG seeks to formulate a deliverable dubbed as 'G20 Roadmap to Stronger Recovery and Resilience in Developing Countries, LDCs and SIDS'.</p> <p>Employment Working Group: Particularly its third priority issue namely 'Sustainable job creation towards changing world of work' and its second priority issue, 'Human Capacity Development for Sustainable Growth of Productivity'.</p> <p>Education Working Group: Particularly its second priority issue 'Digital technologies in education' and its last priority issue 'The Future of Work Post-COVID-19'.</p> <p>Business 20 and Labour 20.</p>

a) World Tourism Organization (n.d./e), 'UNWTO Tourism Online Academy', online available at: <https://www.unwto-tourismacademy.ie.edu> [09-08-2022].



GUIDELINES	PROPOSED CONCRETE ACTIONS	LINK TO G20 WORKSTREAMS
PILLAR 2 INNOVATION, DIGITALIZATION AND THE CREATIVE ECONOMY		
<ol style="list-style-type: none">1. Foster innovation along the whole tourism value chain with a particular focus on digitalization and the creative economy.2. Promote the creation of market intelligence systems and train MSMEs and communities to use them.3. Foster partnerships with tech companies to accelerate digital transformation, innovation and sustainable solutions for MSMEs and startups in the tourism sector.4. Prioritize digitalization within tourism policy and promote specific programmes to support the digital transformation of MSMEs and communities.5. Support the digital transformation of rural areas.6. Foster responsible innovation that focusses on solutions which are socially desirable and undertaken with the public interest in mind.7. Promote market and product diversification through the creative industries, digitalization and community development through tourism.8. Harness the value of intellectual property (IP) for tourism as a powerful tool to boost tourism development and competitiveness among MSMEs and communities.9. Foster technology to promote safe mobility and step up consumer confidence, as well as improve preparedness for future crises.	<ol style="list-style-type: none">1. Evaluate adhering to the UNWTO Digital Futures Programme.2. Evaluate, in cooperation with the relevant national authorities, the creation of a network of Living Museums to strengthen the cultural and creative industries and sectors (CCI) ecosystem.	<p>Digital Economy Working Group: Particularly its first priority issue 'Connectivity and Post-COVID-19 Recovery', as well as its second priority issue, 'Digital Skills and Digital Literacy' on which the working group seeks to devise a 'G20 Toolkit for Measuring Digital Skills and Literacy'.</p> <p>Business 20, Science 20 and G20 Culture.</p>



GUIDELINES

PROPOSED CONCRETE
ACTIONSLINK TO G20
WORKSTREAMS

PILLAR 3

WOMEN AND YOUTH EMPOWERMENT

1. Take measures to address the gender pay gap in tourism.
2. Promote entrepreneurship with dedicated programmes targeted at women.
3. Advance women's full and equal participation in leadership, policy and decision-making.
4. Promote education and training in tourism through programmes specifically for women and youth.
5. Place gender equality at the core of tourism policies and business practices.
6. Empower women's participation in the community and civil society in tourism.
7. Advance the measurement of tourism data on gender and age for better policies.
8. Integrate the targeting strategies with women's and youth labour market profiling to make it easier for the public and private sectors to reach youth and women in occupational categories

1. G20 members are encouraged to join and commit to the action plan of the *Global Report on Women in Tourism*, which provides a framework that includes concrete steps that will help actors in the private and public sectors boost tourism's empowering potential for women.
2. Leveraging G20 EMPOWER Alliance through increasing its network of women leaders and entrepreneurs in the tourism sector.

Empower Initiative particularly on its second priority issue 'Women in MSMEs as Drivers of Economic Growth: Context, Connect and Change'.

Women 20 and **Youth 20**.

GUIDELINES	PROPOSED CONCRETE ACTIONS	LINK TO G20 WORKSTREAMS
PILLAR 4		
CLIMATE ACTION, BIODIVERSITY CONSERVATION AND CIRCULARITY		
<div>1. Accelerate the transition towards low GHG emissions in tourism.</div> <div>2. Engage the tourism sector in GHG emissions removal.</div> <div>3. Capture the value of conservation through tourism.</div> <div>4. Support conservation efforts through tourism.</div> <div>5. Invest in nature-based solutions for sustainable tourism.</div> <div>6. Invest in transition of the tourism value chains towards circularity.</div> <div>7. Prioritize sustainable food approaches for circularity.</div> <div>8. Shift towards a circularity of plastics in tourism.</div> <div>9. Steer recovery funds towards sustainable tourism and promote sustainable finance mechanisms.</div>	<div>1. G20 members are encouraged to take an active role in the promotion of the <i>Glasgow Declaration on Climate Action in Tourism</i>, which provides a framework to accelerate measurement, mitigation and adaptation efforts in tourism, as well as in the <i>Global Tourism Plastics Initiative</i> that unites the tourism sector behind a common vision of a circular economy of plastics.</div>	<div>Environment and Climate Sustainability Working Group</div> <div>Energy Transition Working Group</div> <div>Business 20</div>

GUIDELINES

PROPOSED CONCRETE
ACTIONSLINK TO G20
WORKSTREAMS

PILLAR 5

POLICY, GOVERNANCE AND INVESTMENT FRAMEWORKS

1. Align tourism development with the 2030 Agenda for Sustainable Development.
2. Strengthen whole of government, multi-level coordination for tourism planning and management and community development.
3. Enhance tourism governance through public-private-community partnerships (PPCPs).
4. Promote human capital development through targeted policies and programmes for education and capacity building for communities attending to diversity and inclusion.
5. Enable frameworks for tourism investments.
6. Promote strategies and schemes to safeguard tourism investment in coordination with investment promotion agencies (IPAs) and governments.
7. Strengthen support for tourism investment from financial institutions, including international financial institutions, and foster the development of alternative modes of finance.
8. Ensure that tourism is integrated in overall crisis management policies and actions.
9. Develop procedures for meeting the needs of tourists affected by crisis situations and adhere to the Global Code for the Protection of Tourists.
10. Improve tourism data, including the use of big data, for evidence-base for policymaking, planning and management, and advance towards Measuring the Sustainability of Tourism (MST).
11. Enhance international cooperation and official development assistance through tourism, with a particular focus in the recovery and resilience of MSMEs and communities.

1. Evaluate collaborating with international organizations by facilitating information for the development of a central online tool and APP that can provide comprehensive, transparent and updated information on global travel requirements.
2. Support the processes of harmonization of travel protocols and mutual recognition of certificates being developed by the G20 Health Working Group, while respecting the national sovereignty of each State in this matter.

Development Working Group:

Particularly on its first priority issue 'Strengthening Recovery and Resilience to Withstand Future Crises' upon which the DWG seeks to formulate a deliverable dubbed as 'G20 Roadmap to Stronger Recovery and Resilience in Developing Countries, LDCs and SIDS'.

Trade, Investment and Industry Working Group:

Particularly on its priority issue 'Spurring Sustainable and Mutually Beneficial Investments'.

G20 Health Working Group:

Particularly priority 2 on Harmonizing global health standards focussed on the Harmonization of COVID-19 and other Vaccine-Preventable Diseases (VPD) Certificate Recognition at Point of Entry.

Business 20.

A Balinese dancer in traditional costume performing a dance. The dancer is wearing a gold and red beaded top, a gold sash, and a purple skirt with gold patterns. She is holding a blue and gold fan in her right hand and has her left arm raised. The background is blurred, showing other dancers and a crowd.

02 TOURISM AND COVID-19

ON THE ROAD TO RECOVERY

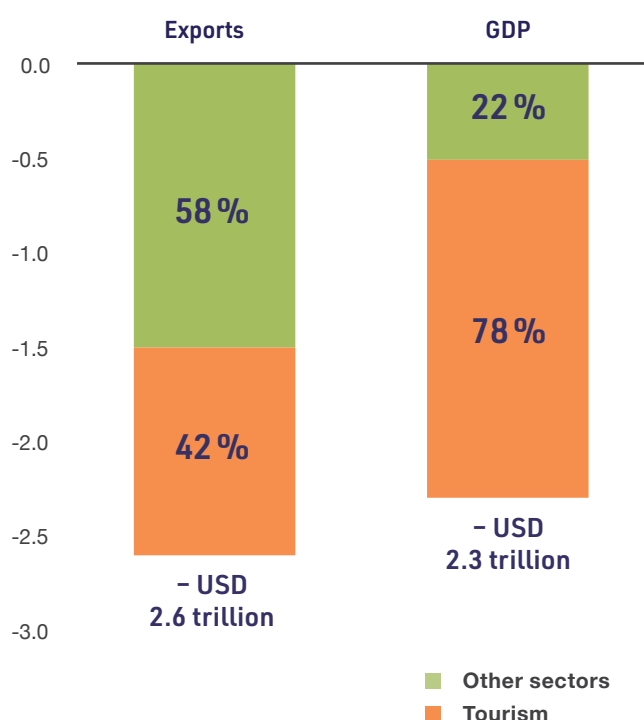


The COVID-19 pandemic has been a major crisis of recent history. For tourism, it has brought an unprecedented disruption, with a massive drop in travel resulting from a global lockdown and widespread restrictions put in place to curb the spread of the virus. As of 6 April 2020, 96% of all worldwide destinations had introduced travel restrictions in response to the pandemic.¹⁰

2020 brought international tourism back to the levels of 30 years ago. International arrivals declined by 71%, from 1.5 billion to 400 million, by far the largest annual fall in the sector's history. This compares with the fall of just a 4% drop registered at the peak of the 2009 global economic crisis. UNWTO estimates that the economic contribution of tourism which amounted to USD 3.5 trillion in 2019, or 4% of world GDP, measured in tourism direct gross domestic product (TDGDP) was cut by almost half in 2020, plunging by USD 1.8 trillion, to 2.0% of world's GDP. This represents almost 80% of the overall decline in the value of world's GDP in 2020.¹¹

Figure 2.1:

Decline in global exports and GDP, 2020 (USD trillion)

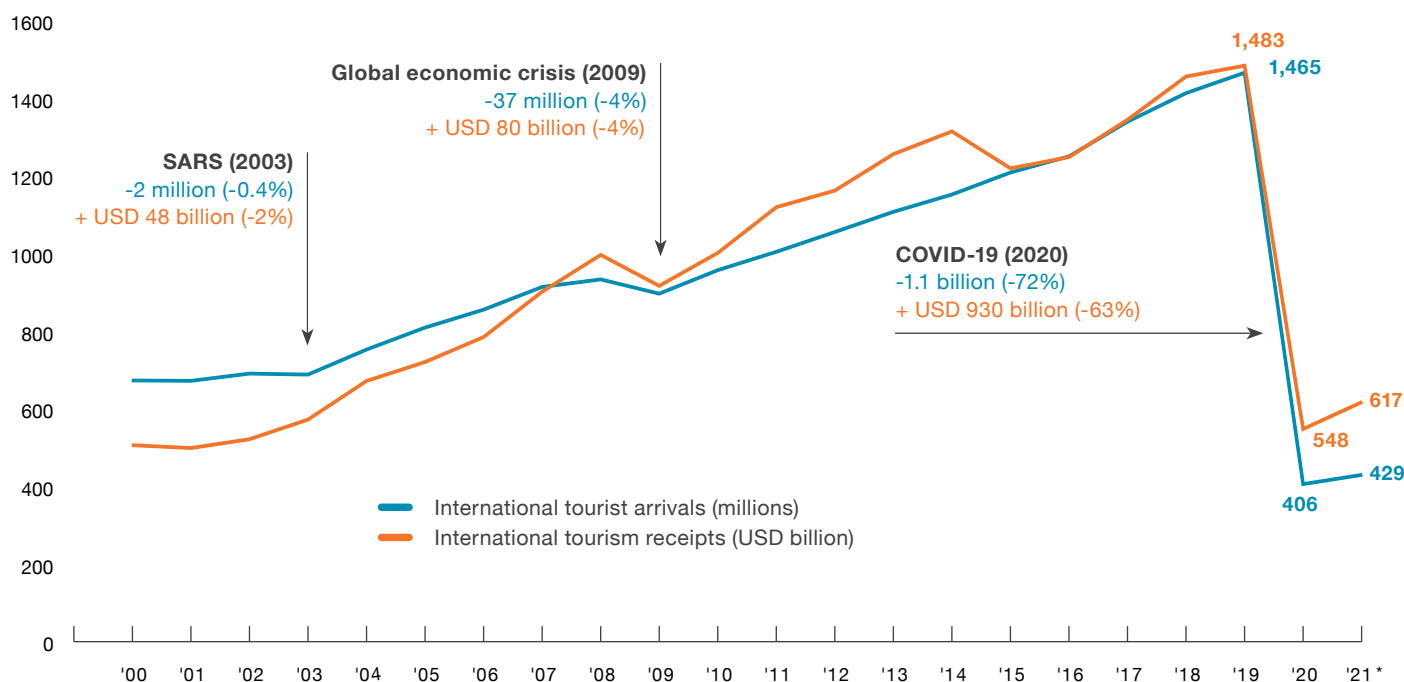


Note: Data as of August 2022.

Source: World Tourism Organization (UNWTO), World Trade Organization (WTO) and International Monetary Fund (IMF).

¹⁰ World Tourism Organization (n.d./c), 'Travel Restrictions', online available at: <https://www.unwto.org/covid-19-travel-restrictions> [22-08-2022].

¹¹ World Tourism Organization (2022/c).

Figure 2.2: International tourism, 2000–2021

Note: Real percentage change (local currencies, constant prices)

Source: World Tourism Organization (2022), as of August 2022.

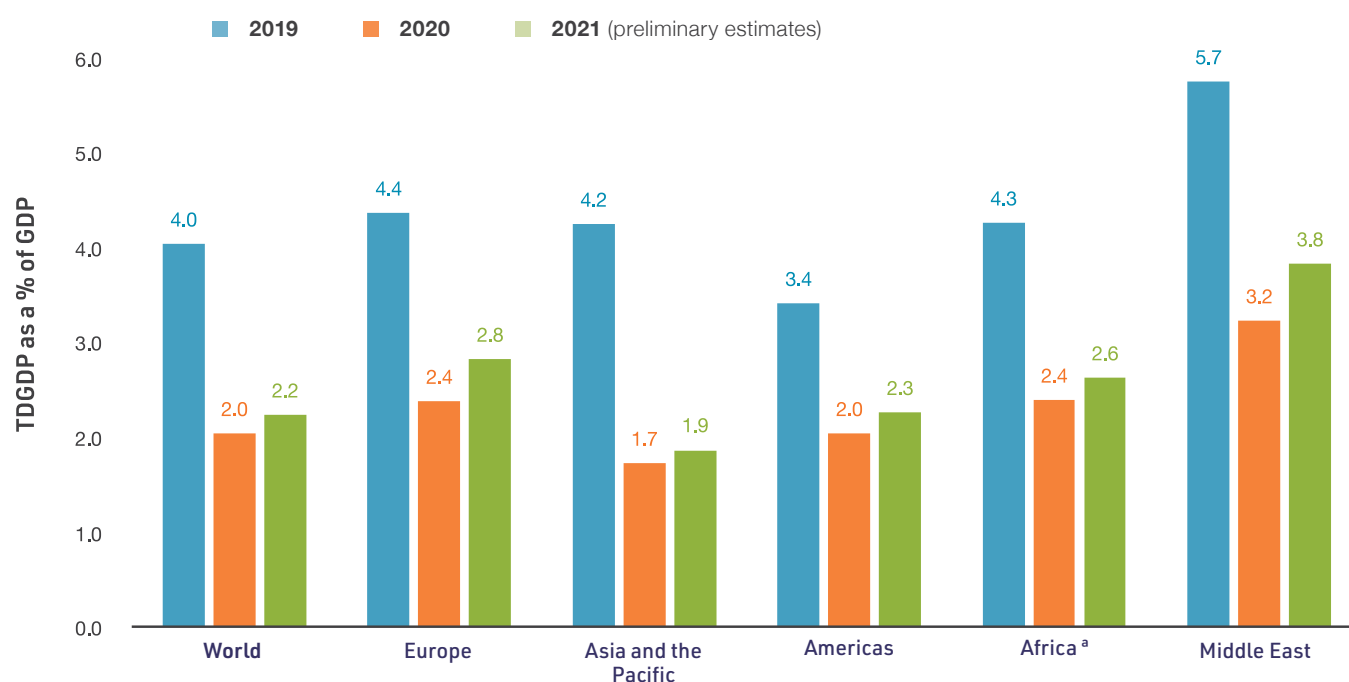
In addition to the tragic loss of life and the devastating impact of the COVID-19 pandemic on health and communities, the crisis has decimated the world of work and put millions of jobs at risk. There was increased unemployment and underemployment, loss of incomes, business closures and bankruptcies, supply chain disruption, rising informality and insecurity of work, and new and exacerbated occupational safety and health (OSH) challenges. Women, young workers and migrants working in tourism have suffered disproportionately from the crisis.¹² Gender equality in the sector has deteriorated, with women across the world suffering disproportionate income and livelihoods losses – withdrawal from education and training, violence, exclusion from decision-making processes, access to health services and being burdened with the majority of the responsibility for unpaid care and domestic work.¹³

By end of 2021, less than two years after the declaration of a pandemic by the World Health Organization (WHO), various vaccines were approved, and more than 50% of the world's population had received at least one dose. While vaccine equity remains a challenge, the progress that has been made, alongside increased coordination among governments, has resulted in a significant easing of travel restrictions and rising consumer confidence. International tourist arrivals grew by 4% in 2021 as compared to 2020.

The economic contribution of tourism (measured in tourism direct gross domestic product – TDGDP) is estimated at USD 2.2 trillion in 2021, above the USD 1.7 trillion in 2020, but still well below the pre-pandemic value of USD 3.5 trillion. Much of the improvement resulted from the recovery in the domestic markets.

12 International Labour Organization (2021/b), *Resolution I: Global call to action for a human-centred recovery from the COVID-19 crisis that is inclusive, sustainable and resilient*, adopted text, ILO, Geneva, online available at: https://www.ilo.org/ilc/ILCSessions/109/reports/texts-adopted/WCMS_806092/lang--en/index.htm, also available at: <https://www.ilo.org/global/lang--en/index.htm> [22-08-2021].

13 International Labour Organization (2021/a), *Report IV: Inequalities and the World of Work*, ILC.109/IV(Rev.), ILO, Geneva, online available at: <https://www.ilo.org/global/lang--en/index.htm> [22-08-2022].

Figure 2.3: Direct tourism GDP, 2019–2021 (% of GDP)

Note: a) Estimates for Africa should be interpreted with caution due to limited official data.

Source: World Tourism Organization (UNWTO), as of August 2022

After the impact of the Omicron variant at the end of 2021, data shows international tourism is recovering at a strong pace. Arrivals increased 221% year-on-year in the first five months of 2022 to an estimated 250 million. Despite the strong rebound, international tourism remained 54% below 2019 levels. Recovery is expected to consolidate throughout 2022, as more destinations ease restrictions and pent-up demand is unleashed. Based on better-than-expected results, as well as booking trends, UNWTO revised its outlook for 2022 upwards, with international arrivals now expected to reach 55% to 70% of 2019 levels in 2022.¹⁴ Nonetheless, recovery is still uneven among regions and industries with many MSMEs still facing important challenges, namely, increased cost due to the deterioration of the economic situation and the liquidity challenges of two years with no income.

¹⁴ World Tourism Organization (2022/d), *UNWTO World Tourism Barometer*, volume 20, issue 4, July 2022, UNWTO, Madrid, DOI: <https://doi.org/10.18111/wtobarometereng>.

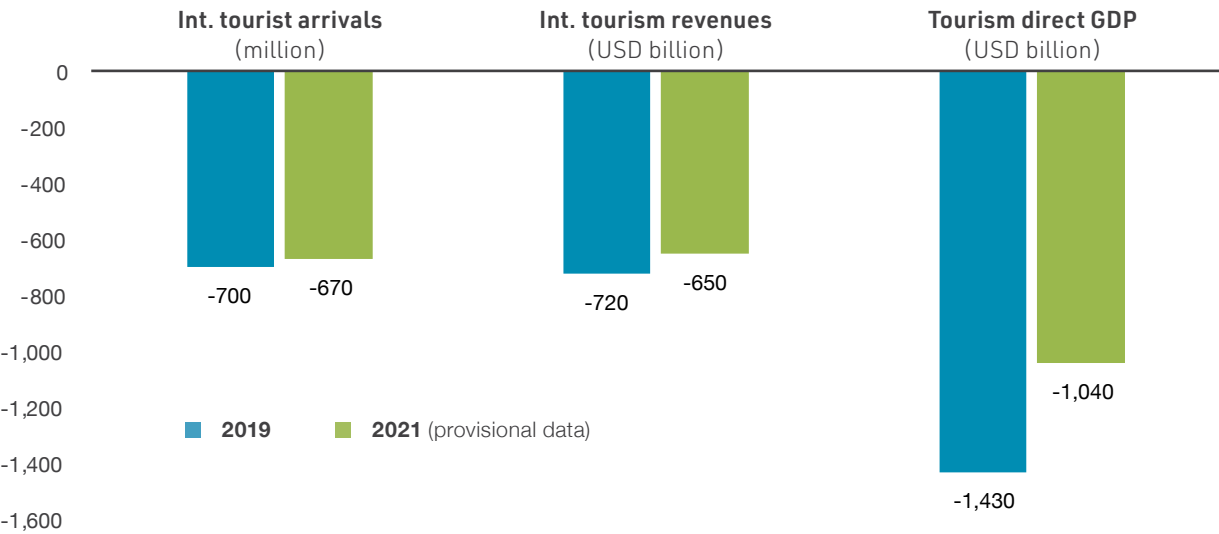
G20 ECONOMIES AND COVID-19

The impact of COVID-19 on tourism has been felt among G20 economies at a varying degree depending on geographic location and weight of tourism in the national economies and jobs. In 2021, the opening of destinations to vaccinated travellers by mid-year, particularly in Europe, has led to a comparative improvement among the G20 countries as a group. Data for 2022, confirm that G20 economies, as a whole, are recovering faster than the world average. International tourist arrivals in the G20

countries stood at -45% as compared to 2019 values in the first five months of 2022 as opposed to -54% for the world.¹⁵

Yet, overall, G20 economies lost around 700 million international tourist arrivals annually, almost USD 1.4 trillion in exports from tourism and around USD 2.9 trillion in tourism direct GDP in the cumulative of 2020 and 2021.

Figure 2.4:
Impact of COVID-19 on the G20 economies, 2019–2021



Note: International tourism revenues consist of international tourism receipts and passenger transport fares.
Source: World Tourism Organization (UNWTO), as of August 2022

15 World Tourism Organization (2022/d).

POLICY RESPONSE TO THE IMPACT OF COVID-19 ON TOURISM

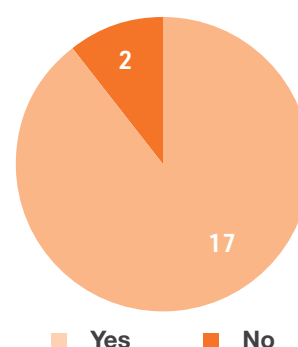
The COVID-19 crisis has prompted an unprecedented policy response among governments around the globe, focussing on fiscal, monetary, social and employment-related measures. Globally, governments have deployed substantial resources to protect jobs and boost their economies throughout the crisis. Government interventions, such as employment retention schemes, have mitigated the impact of the COVID-19 pandemic and safeguarded many jobs in the tourism sector, particularly in developed countries.¹⁶

To a varying degree, all G20 countries have implemented measures to support the tourism sector, and a majority among them specific measures benefiting MSMEs.¹⁷ Fewer measures have been developed specifically to target communities. Despite these interventions, many businesses and workers in the tourism sector – in particular those working in the informal economy and international migrant workers – have been significantly affected while many developing countries have not had access to the resources to effectively implement employment retention schemes.¹⁸

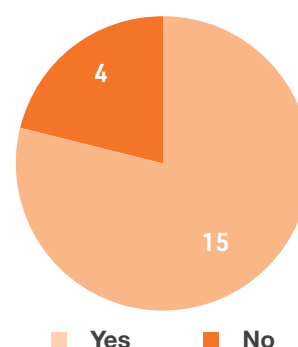
Figure 2.5:

Review of G20 policy responses to mitigate the impact of COVID-19 in tourism, specifically for communities and MSMEs

Has your country developed specific mechanisms to support tourism MSMEs?



Has your country developed specific mechanisms to support local communities?



Source: G20 and Guest Countries Survey (m=19)

16 International Labour Organization (2022/b), *The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID-19 pandemic*, TMSRTS/2022, ILO, Geneva, online available at: https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/meetingdocument/wcms_840403.pdf [22-08-2022].

International Labour Organization (2022/a), conclusions of the Technical meeting on COVID-19 and sustainable recovery in the tourism sector, 25–29 April 2022, Geneva, online available at: https://www.ilo.org/sector/activities/sectoral-meetings/WCMS_824066/lang--en/index.htm [22-08-2022].

17 The only exception being the European Commission in view of its mandate.

18 International Labour Organization (2022/b).

A full-page background image showing a sunset over the ocean. The sky is a mix of blue, orange, and yellow. In the foreground, the dark silhouette of a boat is visible, with its mast and some rigging. The water is calm and reflects the colors of the sky.

03 CHALLENGES AND PRIORITIES FOR RECOVERY AND RESILIENCE



The present section summarizes the results of a survey conducted among G20 and guest countries between January 2022 and May 2022 (see annexes 3 and 4). On the immediate, priorities aim at promoting the domestic market, increase safety and regain visitors' trust with the ultimate goal of restoring pre-pandemic arrivals and spending. Looking on the medium term, key common priorities focus on:

- **Retaining and attracting talent;**
- **Upskilling, reskilling and newskilling** the workforce;
- **Digital adaptation** for MSMEs and communities;
- **Improving multilevel coordination** and whole of government approach;
- Promoting **evidence, data driven** policies;
- **Broadening visitation** to **underserved communities** and promote **new products** and **destinations**;
- Attracting **private sector investment**; and
- Supporting the **transition towards a green travel** and tourism economy.

Table 3.1: Priorities for recovery and resilience as per the survey of G20 and guest countries

PILLARS OF ACTION	G20 AND GUEST COUNTRIES PRIORITIES
PILLAR 1 HUMAN CAPITAL: JOBS, SKILLS, ENTREPRENEURSHIP AND EDUCATION	<ul style="list-style-type: none"> Review national policies and strategies to ensure adequate human capital in tourism Increase level of skills and qualification Attract, regain and retain the workforce (create new and exciting employment and training opportunities) Prepare an agile, secure and resilient workforce Make work in tourism more attractive Support the development and influence of tourism startups Data and research
PILLAR 2 INNOVATION, DIGITALIZATION AND THE CREATIVE ECONOMY	<ul style="list-style-type: none"> Digital and technology adaptation, particularly for MSMEs and rural communities Renovation and innovation in infrastructure, products and services to increase the quality and sustainability of the offer in line with local specificities Development of locally resourced creative industries with intellectual property (IP) potential Increase the attractiveness of tourism and cultural systems Modernize tangible and intangible infrastructure of cultural heritage and improve digital access and use of cultural assets
PILLAR 3 WOMEN AND YOUTH EMPOWERMENT^a	<ul style="list-style-type: none"> Training and skills development Inclusive community development Levering public-private partnerships and the private sector to promote inclusion
PILLAR 4 CLIMATE ACTION, BIODIVERSITY CONSERVATION AND CIRCULARITY	<ul style="list-style-type: none"> Transformation in terms of climate change and sustainability Implement sustainable practices at destinations, including sustainable production and consumption Promote seasonal and geographical dispersal of visitors Expand the scope and strengthen funding for climate action and sustainable infrastructure Adopt a sustainable tourism evidence-based approach Promote financing for destinations and companies to, among others switch to clean energy in tourism infrastructure and transport, foster circularity restore natural ecosystems and protect biodiversity Advance biodiversity preservation and conservation Provide and communicate supply of sustainable products
PILLAR 5 POLICY, GOVERNANCE AND INVESTMENT FRAMEWORKS	<ul style="list-style-type: none"> Tourism as a structural policy Collaboration frameworks including reinforcing public/private sector coordination Improve data and insights for evidence-based policies Attract new investments and grow private sector investment Policies for the domestic market Financial products to support the value chain, priority to MSMEs Sustainable and inclusive funding Planning for epidemic prevention Sustainable policies

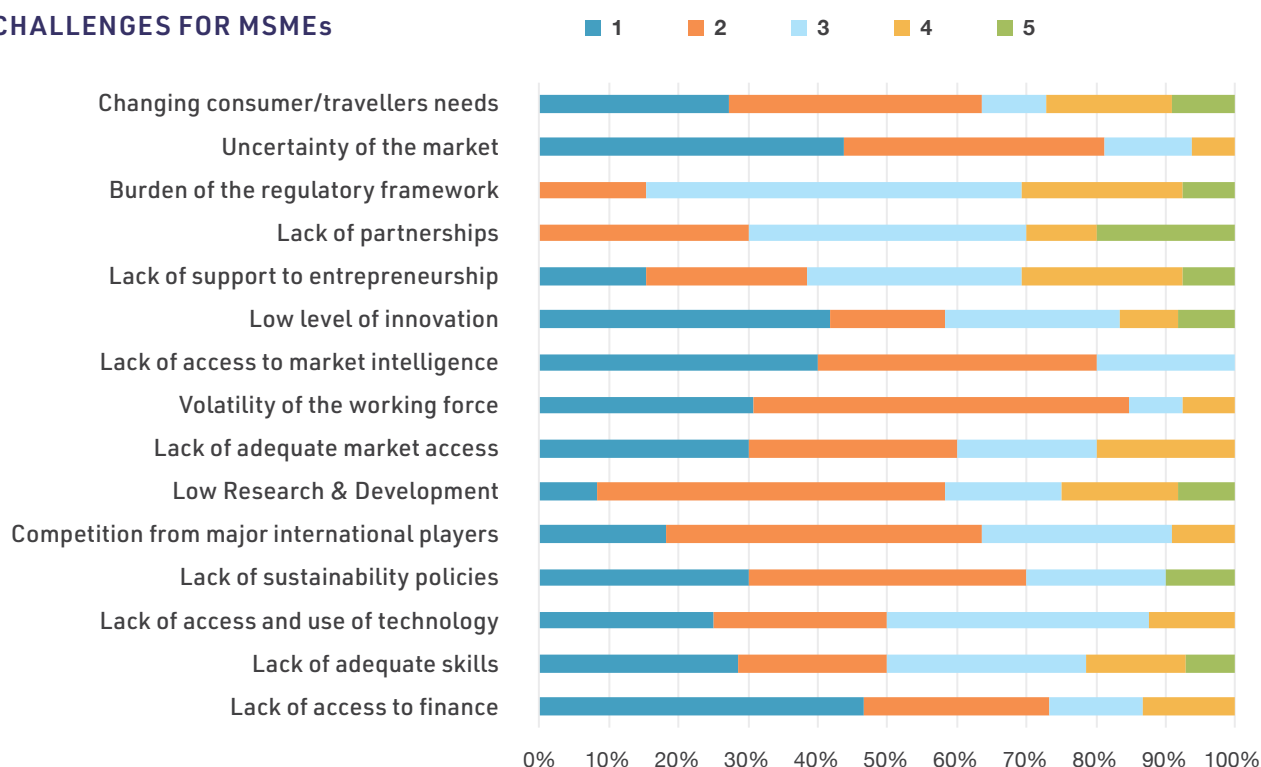
a) Note by the editors: the issue of youth and women empowerment is hardly present in the results of the survey.



Within the priorities above, making MSMEs and communities true agents of transformation will require according to the results of the survey addressing the following challenges (by order of importance and noting that some are strongly intertwined):

The below is included in detail in the following graphs summarizing the priority awarded by G20 and guest countries to the various challenges ahead for MSMEs and communities in advancing these transitions.

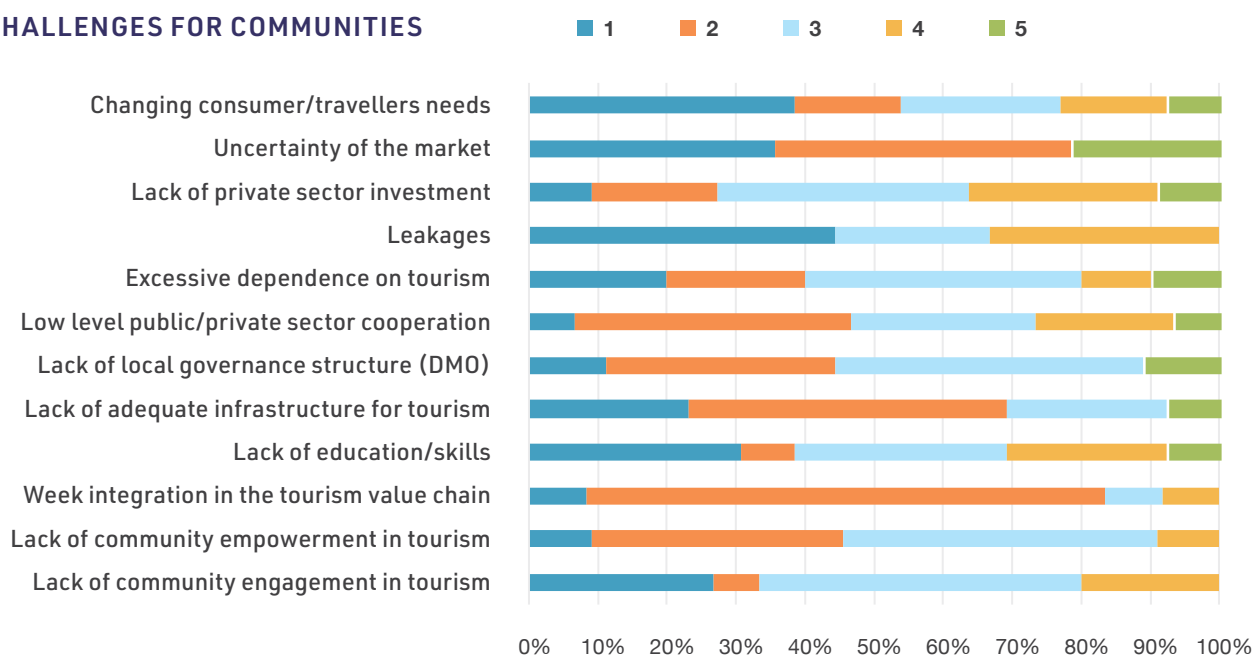
For MSMEs	For communities
<ul style="list-style-type: none"> ▪ Lack of access to finance ▪ Lack of access to market intelligence ▪ The market uncertainty in view of a still ongoing pandemic situation ▪ The volatility of the working force ▪ Changing consumer trends and needs ▪ Low level of innovation 	<ul style="list-style-type: none"> ▪ The uncertainty of the market and changing consumer trends ▪ Leakages (revenue generated by tourism in the community which does not stay in the community, apart from any tax that may be drawn from tourism revenues in accordance with the legal tax framework of the country) ▪ Lack of education and skills ▪ Lack of adequate infrastructure and governance ▪ Excessive dependence on tourism

Figure 3.1: Key challenges for MSMEs**MAIN CHALLENGES FOR MSMEs**

Notes: Multiple answers were possible.

Relevance of challenges from 1 to 5, being 1 'more relevant' and 5 'less relevant'.

Source: Survey of G20 and invited countries, March 2022 (m = 19)

Figure 3.2: Key challenges for communities**MAIN CHALLENGES FOR COMMUNITIES**

Notes: Multiple answers were possible.

Relevance of challenges from 1 to 5, being 1 'more relevant' and 5 'less relevant'.

Source: Survey of G20 and invited countries, March 2022 (m = 19)



04 GUIDELINES

PILLAR 1

HUMAN CAPITAL: JOBS, SKILLS, ENTREPRENEURSHIP AND EDUCATION

THE LABOUR GAP

With an immense impact on jobs in the tourism sector, the pandemic also accelerated a series of shifts happening in the world of work, education and training. While some countries are still a distance away from recovering the previous levels of employment, in those where recovery has been stronger the workforce has become another challenge to be addressed. The pandemic exacerbated certain longstanding challenges, particularly labour gaps. Tourism businesses previously faced challenges filling jobs that were sometimes perceived as being low-wage and low-skilled, with little chance of career advancement or steady employment; with pandemic shutdowns, laid-off employees in tourism appear to be moving into other sectors, leaving many tourism jobs unfilled. For example the food and beverage services industry in Canada reported 145,100 job vacancies in Q3 2021, up from 67,400 in Q3 2019.

EDUCATION AND SKILLS: BUILDING A NEW APPROACH TO SKILLS DEVELOPMENT

At the same time, the tourism sector like many others faces the challenges of disruptive business models, new working modalities, consumer shifts, and technology and communication transformations. The World Economic Forum already predicted that “on average, by 2020, more than a third of the desired core skill sets of most occupations [would] be comprised of skills that are not yet considered crucial to the job” in 2016.¹⁹

The ability to build a new approach to skills development and adapt to the new forms of work will be crucial, especially in areas related to the management of people and the promotion of autonomy in decision-making at all levels. Networking – and network structures, which have redefined and expanded the classic boundaries of organizations – represent the most natural form of relationship in the knowledge society against more rigid organizational schemes, providing flexibility, agility and anticipation capacity. Likewise, societal changes demand a higher level of work-life balance requiring a new vision on what factors are fundamental to attract and retain talent. Finally, creative thinking is essential to succeed in modern, globalized economies based on knowledge and innovation.²⁰

19 World Economic Forum (2016), *The Future of Jobs – Employment, Skills and Workforce Strategy for the Fourth Industrial Revolution, Executive Summary*, WEF, Geneva, online available at: <https://www.weforum.org> [22-08-2022].

20 World Tourism Organization (2019/c), *The Future of Work and Skills Development in Tourism – Policy Paper*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284421213>.



For professionals, technical and vocational educational and training (TVET) systems, skills development and life-long learning systems will be critical to develop their skills continuously (the 'finish studying to start working' paradigm is no longer valid), with special relevance in those less automated or more complex skills, such as problem-solving, analytical skills, critical thinking, creativity, management, coordination of people, emotional intelligence or cognitive flexibility. This is particularly important for adaptive skills and digitalization.²¹

All players should encourage and promote technical and vocational education and training (TVET), skills development, and life-long learning systems, practical and physical skills, as well as most complex skills – the latter less likely to be automated (social and emotional

skills such as empathy, self-efficacy, responsibility and collaboration, cognitive and meta-cognitive skills such as critical thinking, creative thinking, learning-to-learn and self-regulation)²².

In all the above it is essential to stress – when looking at the future of work – that work is not a commodity and that all actors need to have a human-centred approach in order to “act with urgency to seize the opportunities and address the challenges to shape a fair, inclusive and secure future of work with full, productive and freely chosen employment and decent work for all.”²³

The tourism sector must find a mechanism of collaboration among all players including businesses, industries' representatives and training providers – be it public

21 Organisation for Economic Co-operation and Development (2021/d), 'Preparing the tourism workforce for the digital future', *OECD Tourism Papers*, No. 2021/02, OECD Publishing, Paris, <https://doi.org/10.1787/9258d999-en>.

22 Organisation for Economic Co-operation and Development (2019), *Future of Education and Skills 2030. Conceptual learning framework: Skills for 2030*, OECE, Paris, online available at: https://www.oecd.org/education/2030-project/teaching-and-learning/learning/skills/Skills_for_2030_concept_note.pdf [22-08-2022].

23 International Labour Organization (2019/a), *ILO Centenary Declaration for the Future of work*, 2019, ILO, Geneva, online available at: <https://www.ilo.org/global/lang-en/index.htm> [22-08-2022].



or private – to identify demand-driven measures that address the skills gap, strengthen curricula and training tools, and promote reskilling, upskilling, and newskilling for the existing workforce.

In that regard, the pandemic has also demonstrated the immense opportunities of virtual learning which should be incorporated as one part of the set of learning methods in the future, including when arranging technical assistance, training and mentoring for local communities, as well as the MSMEs. At the same time, formal tourism education should be strengthened to ensure the quality of human capital in tourism and the adaptation to market needs and changes. This includes expanding on skills by developing cultural, creative and innovative activities in the secondary and tertiary education curricula, while also improving the competence and professionalism of teachers and lecturers and emphasizing vocational education and higher education.

ATTRACTING AND RETAINING TALENT AND CREATING ADDED VALUE JOBS

Indeed, the increasing challenges related to the attraction and retention of talent in tourism mean the sector needs to promote value-added jobs, improve job-related conditions, including life-work balance, tackle inequalities and focus on career development especially for women, youth and people in vulnerable situations, including people with disabilities, parents returning to the workforce, mature aged workers and indigenous peoples. Likewise, it is essential to promote skills and education in new areas such as advanced communication, informatics and digital technology that would increase inclusive job opportunities in the tourism sector. Education and skills in hard and soft skills need – as mentioned – refinement and tourism education needs to cut across many other areas. This, in turn, will require a better understanding of the tourism jobs, skills and education landscape.

GUIDELINES – PILLAR 1

HUMAN CAPITAL: JOBS, SKILLS, ENTREPRENEURSHIP AND EDUCATION

1 Improve the current situation in the collection of disaggregated data and the analysis of the tourism labour market.

Adequate policies to support jobs and education need to be based on evidence and data. These will be particularly important to understand the panorama of tourism MSMEs and create adequate programmes to support their recovery and resilience. This requires stepping up efforts in the measurement of the tourism value chain and labour markets in line with international standards (*International Recommendations for Tourism Statistics 2008* and *Tourism Satellite Account – TSA*)²⁴, including developing or improving the collection of tourism businesses and employment statistics disaggregated by age, sex, occupation and employment status, and urban-rural divide. It also requires developing further research on tourism MSMEs and labour markets by regularly collecting and disseminating good practices and data on trends and developments related to businesses and employment in tourism, including resilient and sustainable recovery practices, recruitment and retention of workers and existing and newly emerging labour shortages and possible measures to address them.²⁵ Likewise, countries may consider to this end the creation of Observatories on Employment and Education in Tourism to promote a systematic approach to data and policy analysis.

2 Support tourism MSMEs recovery and resilience with specific programmes.

MSMEs represent 98% or more of all tourism business among the few G20 and invited countries providing data on this indicator (3 out of 17)²⁶; they should be allocated specific programmes to support their continued recovery while transitioning to a higher resilience against digital and sustainability challenges. Many tourism MSMEs are indebted and in a fragile situation following the pandemic. As governments start to wind down the COVID supports and repayment of loans now become due, rising costs are squeezing already tight margins, while the cost of credit is also rising. Schemes with a vision of building resilience should particularly focus on the transition of workers and economic units from the informal to the formal economy and supporting MSMEs in addressing market uncertainty, accessing relevant data and insights, access and upskilling for technologies and supporting the creation of innovative products that diversify the overall tourism supply.

24 The *International Recommendations for Tourism Statistics 2008* (also known as IRTS 2008) provides a comprehensive methodological framework for collection and compilation of tourism statistics in all countries irrespective of the level of development of their statistical systems. The *Tourism Satellite Account* (TSA) is a standard statistical framework and the main tool for the economic measurement of tourism.

World Tourism Organization (n.d./d), 'UN standards for measuring tourism', UNWTO, Madrid, online available at: <https://www.unwto.org/standards/un-standards-for-measuring-tourism> [22-08-2022].

United Nations (2010), *International Recommendations for Tourism Statistics 2008*, UN, New York, online available at: <https://www.e-unwto.org/doi/book/10.18111/9789211615210>.

United Nations; Commission of the European Communities, Eurostat; World Tourism Organization and Organisation for Economic Co-operation and Development (2010), *Tourism Satellite Account: Recommended Methodological Framework 2008*, UN, New York, online available at: <https://www.e-unwto.org/doi/book/10.18111/9789211615203>.

25 International Labour Organization (2022/a).

26 G20 survey conducted for the development of the present Guidelines, see annex 4.



3 Enhance the linkages to other sectors along the tourism value chain and reduce leakages.²⁷

This implies promoting a higher integration of other sectors in the tourism supply chain, promoting policies and initiatives that increase the consumption of goods and services that can be competitively sourced locally, and implementation of sustainable and socially responsible enterprises as promoters of innovation and decent work, as well as the preservation of the destinations' social cohesion, cultural and natural resources. The improvement of the integration of the tourism value chain and the inclusion of other sectors, particularly financial and technological services, health and wellness, agriculture, culture and creative industries, is essential to improve innovation, productivity and the multiplier positive effect of the tourism sector on the whole of the economy and job creation.

4 Promote active policies and initiatives that stimulate entrepreneurship.

This includes initiatives to connect startups with investors and governments and frameworks that support innovation, technology access and open data. Incubating more entrepreneurs, with attention to diversity and inclusion among the entrepreneurs, is one of the routes that could be taken. This can include, among others, business development, managerial or business relations, in particular for MSMEs in the fields of tourism and creative economy. The process of business incubation could also be accelerated by quality partnership and facilitation programmes with larger enterprises in tourism and creative economy sectors, as well as technology partners. In addition to bottom-up incubation (private-led incubation), it is also possible for governments to scout potential new business and develop top-down incubation programmes in cooperation with state owned enterprises (SOEs).

²⁷ Tourism leakage occurs when revenue generated by tourism is lost to outside economies.



5

Promote access to universal, adequate, gender sensitive and sustainable social protection to all engaged in the tourism sector, fair wages, decent working conditions, occupational safety and health, and protect all workers against violence and harassment,²⁸ advancing the transition towards formality within existing international and national legal frameworks.

As a policy guidance, and according to national circumstances, consider the ratification and implementation of ILO's International Labour Standards, and in particular the Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172) and Recommendation (No. 179) and the Transition from the Informal to the Formal Economy Recommendation, 2015 (No. 204) the Indigenous and Tribal Peoples Convention, 1989 (No. 169) the ILO Guidelines on decent work and socially responsible tourism²⁹ (2017), the Convention on Violence and Harassment 2019 (No.190) and the Violence and Harassment Recommendation (No.206). The ILO Guidelines on Decent Work and Socially Responsible Tourism provide a reference tool to address labour-related challenges and opportunities for the sustainable development of the tourism sector.

6

Enable newskilling (skills acquisition), upskilling and reskilling for workers throughout their working lives.

Actively engage in diversified skills development, certification, technical, vocational and educational training (TVET) systems, and life-long learning policies, programmes and strategies, including through social dialogue and partnerships across the education and training sectors as a means to promote decent work opportunities for all and enable the sector to better respond to the changing requirements. The improvement should also be holistic, meaning that it is not only in a technical aspect of tourism and/or creative economy, but also in the strategic aspect such as leadership, management and monitoring. Training and mentoring from central or local governments is one of the measures that can be taken to support such programmes. Such approach should be based on life-long education and learning, and the development of soft skills (creative thinking and innovation, problem-solving, team work, empathy, etc.), as well as key cultural and technology competencies (to valorize the cultural offering of the territories). It should include the development of key skills in areas such as communication, customer focus, product development, marketing and promotion (especially online marketing), the compliance with international standards, in particular food safety, accommodation quality, safety and health, and universal accessibility, as well as tourism planning and policymaking at national and local level.

²⁸ International Labour Organization (2022/a).

²⁹ The ILO Guidelines on decent work and socially responsible tourism include a non-exhaustive list of international labour standards.

7

Maximize the use of digital tools in education and skills development, and support tourism practitioners with the necessary certified digital learning tools to foster recognition of prior learning.

This will ease the re-entry into the job market, especially for those with informal work histories.

The potential of digital technology that the pandemic has shown for education and training should be maximized with the expansion of tourism education and online training, training for the creative industries and promote network opportunities that promote cultural and creative industries (CCI) -based potential in tourism.

8

Promote the development of multi-stakeholder partnerships in building a new approach to education and training in tourism.

This includes engaging with social and technology partners, developing linkages and matching programmes. Also, while many vocational schools majoring tourism and hospitality are not located near tourism destinations, the efforts to connect future tourism workers and employers should be bridged by governments, in particular national education and tourism administrations. Linking the private sector and formal education in tourism and hospitality should also be initiated to reduce job waiting time for future graduates. Develop mechanisms for collaboration among representatives of government, employers, workers, academics, researchers and training providers, as well as between-sector stakeholders at national and regional/local level, especially employers and workers.³⁰

30 OECD: These issues were addressed under the digital pillar of the G20 Rome Guidelines (guidelines for action). This is now being progressed by countries, with good examples.

See: Organisation for Economic Co-operation and Development (2021/d), p. 41; and

Organisation for Economic Co-operation and Development (2021/c), 'Preparing the tourism workforce in Portugal for the digital future', *OECD Tourism Papers*, No. 2021/04, OECD Publishing, Paris, p. 23, DOI: <https://doi.org/10.1787/bcada146-en>.



9

Encourage the industry-led engagement in the update of competency standards and curricula, as well as national mechanisms to drive tourism skills policy and develop campaigns that value employment in tourism, attract and retain talent.

A career in tourism should be made more attractive by updating competences, future growth, and individual career opportunities and working conditions, but also the image of a job in the sector in order to attract and retain the right talent.

10

Promote the creation of and skills development for sustainable jobs.

The understanding of, and commitment for green jobs supporting an adequate transition for workers and employers towards a low carbon, climate change decelerating, environmentally friendly and socially respectful development should be a crucial part of the future of work in tourism. Sustainable jobs need to be integrated in all tourism-related policies on employment and business, including skills development for biodiversity conservation and climate change mitigation.



LINK TO OTHER G20 WORKSTREAMS

- **Development Working Group:** Particularly on its first priority issue 'Strengthening recovery and resilience to withstand future crises' upon which the Development Working Group seeks to formulate a deliverable dubbed as 'G20 Roadmap to Stronger Recovery and Resilience in Developing Countries, LDCs and SIDS'.
- **Employment Working Group:** Particularly its third priority issue, 'Sustainable job creation towards changing world of work' and its second priority issue, 'Human capacity development for sustainable growth of productivity'.
- **Education Working Group:** Particularly its second priority issue 'Digital technologies in education' and its last priority issue 'The future of work post-COVID-19'.
- **Business 20 and Labour 20.**

PROPOSAL FOR CONCRETE ACTIONS

1. Evaluate the creation of a **voluntary G20 Tourism Exchange Programme** promoting internships across G20 countries coordinated by educational institutions and the ministries of/with a portfolio of tourism according to the capabilities, laws and regulations enacted in all participating countries.
2. **Promote and expand existing online training such as the UNWTO Tourism Online Academy** as a global aggregator of online training for tourism.³¹

31 See for further information: World Tourism Organization (n.d./e).

PILLAR 2

INNOVATION, DIGITALIZATION AND THE CREATIVE ECONOMY

THE DIGITAL TRANSFORMATION

The pandemic has accelerated the needs and use of digitalization that has been underway for decades as the response to improve customer experience and seamless interaction of businesses and between businesses and customers. Customers with Internet access began shopping remotely, many employees began working from home, and many businesses adopted digital business models to keep operations running and some revenue flowing. Globally, 58% of global customer interactions were being deployed within the digital realm, accelerating its growth for around three years' time. UNCTAD mapped 16% to 19% growth in e-commerce transaction in 2020, and more than USD 26.7 trillion in global e-commerce transaction were recorded.

The challenge in digitalization mostly concerns equal access to digital infrastructure and devices, as well as how digitalization can actually connect all potential resources for the benefit of users, instead of being a divider or creating gaps among users. Unequal access to

digital infrastructure and devices, as well as lack of skills are important factors to be considered in overcoming the digital gap. This is the case in tourism, where in many countries MSMEs account for over 90% of all businesses.

Moreover, nowadays the digital divide can even deepen the inequality, discrimination and exclusion of those with limited access to new technologies, even to a greater extent, particularly when it comes to rural communities and people with limited digital skills.

The digital transformation is essential not only for increasing competitiveness of MSMEs and communities, but also to advance seamless travel. As indicated in the Rome Guidelines, countries should "explore ways to promote the use of digital traveller identity, biometrics and contactless transactions to facilitate safe and seamless travel. The use of such procedures has become more widespread in recent years and should be accelerated in the interests of safe mobility. Requirements include the interoperability of technologies and systems, and mutual recognition of appropriate authorities and other users,



together with respect for data privacy based on agreed international standards and principles and in accordance with national laws and regulations.”³² The importance of this agenda has become even more relevant in facilitating travel in the context of COVID-19 when the use and mutual recognition of digital certificates and clear communication of travel requirements has been instrumental in restoring safe mobility, easing travel restrictions and building travellers’ confidence. As indicated in the Chairman’s statement of the High Level Meeting on Safe International Travel organized by Spain and OECD on 7/8 July 2022, there “was consensus that an interoperable, flexible and pragmatic approach to the adoption of vaccination, recovery and testing certificates as an instrument to improve the safe and seamless recovery of international travel is vital.”³³

32 Organisation for Economic Co-operation and Development (2021/a).

33 Organisation for Economic Co-operation and Development (2022), *High-Level Meeting on Safe International Travel, Ibiza, Spain, 7–8 July 2022 – Chair’s summary*, Ibiza, online available at: <https://www.oecd.org/health/safe-international-travel/> [22-08-2022].

ADVANCING INNOVATION

Innovation in tourism is essential to achieve sustainable, inclusive and resilient tourism, as well as safe, seamless and sustainable tourist journeys. Innovation intends to bring tangible and intangible benefits to tourism stakeholders and the local community, improve the value of the tourism experience and the core competencies of the tourism sector and so enhance tourism competitiveness and sustainability. Innovation in tourism may cover areas such as tourism destinations, tourism products, technology, processes, organizations and business models, skills, architecture, services, tools and/or practices for management, marketing, communication, operation, quality assurance and pricing.

One key challenge that is currently in the spotlight is to innovate and provide “experience tourism”, which is preferred in these trying times. Innovation should spur value-added products, strengthen tourism linkages with other sectors, reduce costs and support the implementation of planning and management solutions that contribute to the economic, sociocultural and environmental sustainability of the sector.

Yet, to bridge the tourist experience and sustainability gap and drive innovation in tourism, innovation strategies should consider innovation policies in the tourism sector and cover scientific research, technology commercialization, information technology (IT) investments, education and skills development, taxation, trade, intellectual property (IP), government procurement and regulatory policies in an integrated fashion.

These challenges might require innovation and investments to create programmes to address skills shortages and gaps.³⁴ Embracing digitalization throughout the tourism ecosystem will help to drive

the ability of business to build resilience by fostering digital technologies, but at the same time it will provide opportunities to retain and develop strategies to upskill human capital and implement digital technologies MSMEs. For this reason, UNWTO launched the Digital Futures Programme, which seeks to accelerate economic recovery of the tourism sector by supporting SMEs to unleash digital technologies to create jobs and enhance future resilience in the linkages of the tourism value chain post-COVID-19.

As presented in the *UNWTO Investment Guidelines*,³⁵ venture capital (VC) investment in the travel tech sector has experienced continuous growth throughout the last decade. Around USD 455 billion has been invested in travel and mobility tech startups from 2010 to 2019.³⁶ Surprisingly, despite the 2020 drop in global investment, the amount of funding towards the travel tech sector remains not only stable, but experiences a marginal increase compared to 2019.

However, it is also important to mention that globally, the VC investments in emerging economies represent less than 1% of total investments in travel tech startups. There must be a real push in investments vehicles to support and foster innovation and travel tech startup solutions in emerging economies, as well as open opportunities to invest in untapped markets with growing potential demand.³⁷

34 Organisation for Economic Co-operation and Development (2021).

35 World Tourism Organization (2021/d), *UNWTO Investment Guidelines – Enabling Frameworks for Tourism Investment*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422685>.

36 World Tourism Organization (2021/e), ‘UNWTO Travel and Tourism Tech Startup Ecosystem and Investment Landscape’, online available at: <https://www.unwto.org/travel-and-tourism-tech-startup-ecosystem-and-investment-landscape> [22-08-2022].

37 World Tourism Organization (2021/d).

BUILDING UP ON THE SYNERGIES BETWEEN TOURISM AND THE CREATIVE ECONOMY

“The creative economy involves, inter alia, knowledge-based economic activities and the interplay between human creativity and ideas, knowledge and technology, as well as cultural values or artistic, cultural heritage and other individual or collective creative expressions”³⁸.

UNESCO makes an emphasis on goods, services and activities of cultural, artistic and heritage nature, originated in human creativity. It also underscores the prominent role of the cultural value chain which allows for creative industries to reach their audience and the market.³⁹

Cultural and creative industries and sectors are the lifeblood of creative economy. They include advertising, architecture, visual arts and crafts, design, fashion, audio-visual (including film, television, video games and multimedia), photography, music, performing arts, (electronic) books and publishing, software, computer games. Besides these, the culinary arts should also be considered.

The creative economy is the sum of all the parts of the creative industries, including trade, labour, production and dissemination. Today, the creative industries are among the most dynamic sectors in the world economy providing new opportunities for developing countries to leapfrog into emerging high-growth areas of the world economy.

The creative industries possess a significant commercial and cultural value, and as such feed in the product development within the cultural tourism ecosystem, enriching its overall offer on the market.

To infuse the value of the creative industries in tourism and ensure that tourism can in turn support the development of the creative arts some critical issues need to be addressed. These include a suitable working environment, a just, fair and inclusive creative economy ‘ecosystem’ with dignified working conditions, a special attention paid to informal and freelance creators, decent pay and growth opportunities. Data collection, consultation of industry workers and women and youth perspectives should also be considered. Creative economy approaches can also be leveraged by tourism to stimulate innovation and develop new business models, products and experiences. More specific issues for building linkages between tourism and the creative economy to drive value in both sectors include mechanisms to embed creativity in the destination and stimulate visitation, networks and creative clusters, public-private-community partnerships, support co-creation with user-generated experiences, creative storytelling and branding, etc.⁴⁰

Furthermore, as a sector whose economic activities rely on human capital, intellectual property (IP) and creativity, assisted by advanced technology that can create products or services with potential IP value and innovation, tourism should advance the relationship with intellectual property. Therefore, its challenges lay in the elements within its ecosystem; from the creators/human capital (such as education, access and network), to the creative products/services (such as manufacture, material supply and IP rights), to the market/users (such as marketplaces, stages and compensation/awards), as well as the research and development that would provide input to creative actors for their next works, which expands to research institutions, feedback/critics, discovery of new techniques, new technology, etc.

38 United Nations (2020/a), *International Year of Creative Economy for Sustainable Development*, Resolution A/C.2/74/L.16/Rev.1, UN Digital Library, New York, online available at: <https://digitallibrary.un.org/record/3847697?ln=es> [22-08-2022].

39 United Nations Educational, Scientific and Cultural Organization (n.d.), ‘What do we Mean by the Cultural and Creative Industries?’, Capacity-Building Programme in Africa, Document No. 11, UNESCO, online available at: <https://en.unesco.org/creativity/sites/creativity/files/digital-library/What%20Do%20We%20Mean%20by%20CCI.PDF> [22-08-2022].

40 Organisation for Economic Co-operation and Development (2014), *Tourism and the Creative Economy*, OECD Studies on Tourism, OECD Publishing, Paris, <https://doi.org/10.1787/9789264207875-en>.

GUIDELINES – PILLAR 2

INNOVATION, DIGITALIZATION AND THE CREATIVE ECONOMY

1 Foster innovation along the whole tourism value chain, with a particular focus on digitalization and the creative economy.

- Linking tourism and creative industries in the areas of product development and, design of engaging and interactive experiences in the existing cultural tourism destinations;
- Developing new products and experiences at destinations, as well as new destinations and their marketing strategies;
- Examine means of financing programmes for the creative industries linked to tourism and facilitating their access to loans;
- Focussing on developing and hosting those events which can feature the creative industries of the destination, aligned with its values and objectives and its overall positioning;
- Placing gastronomy tourism as a pillar of tourism development for its ability to create added value experiences and the links with agriculture, traditions and innovation; and
- Investing in innovation and digital transformation applied to the promotion and conservation of tangible and intangible cultural heritage, as well as the online commerce channels managed by cultural creators and social enterprises to leverage on their creative industries.

2 Promote the creation of market intelligence systems and train MSMEs and communities to use them within relevant regulation frameworks.

Among the main challenges identified by surveyed countries in the transformation of MSMEs and communities is the lack of market intelligence. Governments can develop systems of market intelligence to support companies and destinations, and provide them with mentoring initiative that allow them to keep abreast with changing patterns of demand and trends. This requires proper previous investment in digital infrastructure which is critical for the development of both MSMEs and communities.

3 Foster partnerships with tech companies to accelerate digital transformation, innovation and sustainable solutions for MSMEs and startups in the tourism sector.

The private sector can enable synergies to facilitate digital training programmes to uptake the use of digital technologies and tools to increase competitiveness for MSMEs and startups in the tourism sector.⁴¹

41 World Tourism Organization (2021/d).



4 Prioritize the digitalization within tourism policies and promote specific programmes to support the digital transformation of MSMEs and communities.

These can have a focus on big data and the Internet of things (IoT), digital payments, artificial intelligence, contactless and identification technology, and apps.

5 Support the digital transformation of rural areas.

Ensure the presence of necessary infrastructure to enable widespread digital coverage, promote policies and investment that reduce the digital gap between rural and urban territories in terms of infrastructure, access and skills. While virtually all urban areas in the world are covered by a mobile broadband network, gaps in connectivity and Internet access persist in rural areas. Globally, 76% of households in urban areas have Internet usage, almost twice as many as in rural areas (39%).⁴²

6 Foster responsible innovation that focusses on solutions which are socially desirable and undertaken with the public interest in mind.

Funders, researchers, interested and affected parties, including the public, all have a role to play in innovation. When it comes to businesses, responsible innovation means taking into account and taking steps to address the potential impacts of introducing a new product, service, process or business model. Responsible innovation also takes into account the impact on the innovator, investors, customers, suppliers and society. New innovative products, services, processes and business models are better when the benefits for society can be accomplished and any potential downsides avoided. The innovative tourism industry shall emerge as triumphant, where challenges turned into opportunities and innovation.

⁴² International Telecommunication Union (2020), *Internet use in urban and rural areas*, 2020



7

Promote market and product diversification through the creative industries, digitalization and the promotion of community development through tourism.

Investing in infrastructure, technology and skills development in local communities will contribute to build new destinations and diversify tourism experiences with the ultimate goal of dispersing demand in time and space while creating new opportunities for growth and decent jobs in remote areas, new destinations or territories in decay. Digital access and upskilling are key to the development prospects of local communities, as this is the best avenue after the pandemic for them to access the tourism and creative industries markets.

8

Harness the value of intellectual property (IP) for tourism.

IP is a powerful tool to boost tourism development and competitiveness among MSMEs and communities. A report by the World Intellectual Property Organization (WIPO) and UNWTO on the value of intellectual property in boosting tourism shows how the IP system creates a favourable ecosystem for innovation, entrepreneurship and investment in the sector.⁴³ The IP system is designed to promote creativity and innovation and support efforts by individuals, businesses and other actors to differentiate themselves and their products and services in the marketplace, whether through trademarks, geographical indications, copyrights or patents. IP can be included in tourism product development – from destination branding to tourism policies. It can be used to leverage and raise funds and add value to tourism services and products, as well as to protect and promote local knowledge, traditions and cultural heritage.

⁴³ See: World Tourism Organization (2021/a), 'New report shows value of IP to the tourism sector, press release', UNWTO, Madrid, online available at: www.unwto.org [22-08-2022].

You can consult the full report through: World Intellectual Property Organization and World Tourism Organization (2021), *Boosting Tourism Development through Intellectual Property*, WIPO, Geneva, DOI: <https://doi.org/10.18111/9789284422395>.



9

Foster technology to promote safe mobility and step up consumer confidence, as well as improve preparedness for future crises.

The advances in safe and seamless travel introduced prior to the pandemic have been in some cases halted, and in other cases accelerated. This includes the use of digital tools for the check in with airlines and accommodation or for the verification of travel documents, such as certificates of vaccination or testing. The use of mobile applications can also be fostered as a key tool to promote clear, easy and up-to-date information to consumers on travel requirements. Finally, as stressed at the High Level Meeting on Safe International Travel organized by Spain and OECD on 7/8 July 2022 in support of the Presidency, “in order to ensure seamless and functional interoperability between different types of certificates, participants encouraged countries to work towards technological solutions that promote recognition in line with legal provisions applicable across countries of different types of interoperable certificates, which could eventually include the establishment of a system of systems, i.e., a global directory of trusted digital services and a trust network federator that facilitates trust across diverse formats of certificates and their implementations”⁴⁴.

LINK TO OTHER G20 WORKSTREAMS

- **Digital Economy Working Group:** Particularly its first priority issue ‘Connectivity and Post-COVID-19 Recovery’, as well as its second priority issue, ‘Digital Skills and Digital Literacy’ on which the working group seeks to devise a ‘G20 Toolkit for Measuring Digital Skills and Literacy’.
- **Business 20, Science 20 and G20 Culture.**

PROPOSAL FOR CONCRETE ACTIONS

1. **Evaluate adhering to the UNWTO Digital Futures programme** which seeks to accelerate economic recovery of the tourism sector by supporting MSMEs to unleash digital technologies to create jobs and enhance future resilience in the linkages of the tourism value chain post-COVID-19. The programme has the ambition to reach out at least 1 million SMEs providing online trainings to uptake the use of digital technologies and tools to increase competitiveness for SMEs.
2. **Evaluate, in coordination with the relevant national authorities, the creation of a network of Living Museums** to strengthen the cultural and creative industries (CCI) and sectors ecosystem within the context of experience tourism. The network could add value to (in) tangible commodities, share and promote strategies in developing and monetizing the IP potential, as well as the benefits from the advancing digital and communication technologies, and conduct research and development through a synergy among all stakeholders.

44 Organisation for Economic Co-operation and Development (2022).

PILLAR 3

WOMEN AND YOUTH EMPOWERMENT



WOMEN AND YOUTH – THE MOST AFFECTED BY THE CRISIS

The COVID-19 pandemic has caused structural changes in employment across size and sector with a major impact on women and youth. In most regions of the world, women make up the majority of the tourism workforce, yet tend to be concentrated in the lowest paid and lowest status, as well as informal jobs in tourism and perform the vast majority of unpaid work in family tourism businesses.

While the COVID-19 crisis has affected workers throughout the industry, women's employment has fallen more than that of men. While tourism specific data are unavailable, global data is indicative of the scale of the challenge in the industry. In 2021, there were still 13 million fewer women in employment compared to 2019 worldwide, while men's employment was projected to recover to 2019 levels. Meanwhile, only 43.2% of the world's working-age women were employed compared to 68.6% of working-age men.⁴⁵

Gender equality in the tourism sector has deteriorated, with women across the world suffering disproportionate income losses and being burdened with the majority of the responsibility for unpaid care and domestic work. Subsequently, women in tourism have been pushed into inactivity by the care work crisis. There is a risk that the COVID-19 pandemic could reverse hard-won gains on gender equality and women's rights across the tourism sector and the wider economy, with negative implications for economic growth, productivity and sustainability. Potential issues for the sector include stagnation in the progress of reducing gender pay and employment gaps in many places and an increase of violence against women and harassment.⁴⁶

Youth workers are the most affected in terms of rising unemployment at the beginning of the pandemic (between February and March 2020).⁴⁷ This not only increases the unemployment rate of youth in short run, but there would also be a long-term scarring effect of future employment for those who graduate in the pandemic era,

45 International Labour Organization (2019/b), *Policy Brief – Building Forward Fairer: Women's rights to work*, ILO, Geneva, online available at: <https://www.ilo.org/global/lang-en/index.htm> [22-08-2022].

46 International Labour Organization (2021/a).

47 reports such as Organisation for Economic Co-operation and Development (2010).



often referred to as “class of corona”.⁴⁸ This is due to the fact that they will be less likely to be able to accumulate working experience, thus, as the economy bounces back, this “class of corona” would be less favoured by companies compared to the fresh graduates at that time.

The challenges for recovery and resilience are large and complex considering that the revival of the tourism sector does not only depend on the internal variables of the business itself but also on external variables, such as:

1. While in some countries the increasing population of young job seekers is causing oversupply in the labour market, in others there are growing labour shortages;
2. Long-term effects of the pandemic to the future employment opportunities for “class of corona”;
3. The decrease in the number of work units that match the skills of young people and at the same time new work units are increasing due to technological disruption, but have not been able to absorb additional young and female workers;
4. The global economy is targeting more the population of young people and women as users rather than producers of products or derivatives of technology products;
5. Information technology products have not been able to reach tourism MSMEs proportionally, thus preventing the dominant youth and women businesses from developing their business in a sustainable manner; and
6. Discriminatory laws and corporate practices and negative sociocultural norms that create barriers for women to enter and progress in the sector.

48 International Labour Organization (2020).

GUIDELINES – PILLAR 3

WOMEN AND YOUTH EMPOWERMENT

Considering the G20 Roadmap Towards and Beyond the Brisbane Target: More, Better and Equally Paid Jobs for Women, as well the Actions for Women’s Empowerment in the Field of Tourism included in annex 1 of the G20 Tourism Ministers’ Meeting held in Kutchan, Hokkaido, Japan, on 26 October 2019.

1 Take measures to address the gender pay gap in tourism by:⁴⁹

- Tackling adequate social protection for women and addressing unpaid work; and
- Systematically address the sexual harassment and violence committed against women workers in the tourism sector,

2 Promote entrepreneurship with dedicated programmes targeted at women:

- Work to ensure that women’s tourism businesses can become formalized, and contribute to women’s social and financial inclusion;
- Expand and diversify women’s market access and fair trade for their tourism products and services;
- Support women to expand and diversify their tourism products and services;
- Introduce measures to improve women’s work-life balance in tourism and encourage an equal division of unpaid care work in tourism communities; and
- Expand women’s access to digital technologies, including digital tourism platforms.

49 World Tourism Organization (2022/a), *Gender Mainstreaming Guidelines for the Public Sector in Tourism*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284423248>.
World Tourism Organization (2022/b), *Gender-inclusive Strategy for Tourism Businesses*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284423262>.
For guidelines 1 to 7 see: World Tourism Organization (2019/b), *Global Report on Women in Tourism – Second Edition, Key Findings*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420407>.



3

Advance women's full and equal participation in leadership, policy and decision-making:

- Work towards gender balance at all levels, including in senior management of tourism companies;
- Address the lack of high-level women's leadership in decision-making spaces in the private and public sector tourism bodies and agencies;
- Ensure ILO policies on maternity and care responsibilities are respected; and
- Actively support women's representation and leadership in trade unions.

4

Promote education and training in tourism through programmes specifically for women and youth.

This includes training on soft skills, networking and high-level training for career progression. Build targeted training for women to ensure that they can use digital technologies to innovate through digital technologies in tourism.

5

Place gender equality at the core of tourism policies and business practices – and the experiences of diverse women – throughout policy, programme and strategy development.

It is encouraged to provide gender equality training for tourism policymakers, managers and employees, adequate regulation and integrate women empowerment into all phases of the tourism policy and programme cycle.



6

Empower women's participation in communities and civil society in tourism:

- Facilitate women's voice in community and household decision-making; and
- Support women's tourism networks, NGOs and tourism cooperatives to actively work towards women's empowerment in the sector.

7

Advance the measurement of tourism data on gender and age for better policies.

It is recommended to regularly collect and report employment data that is disaggregated by sex, age, occupation and rural/urban divide, – where possible – formal and informal employment, gender pay gaps, entrepreneurship, education and training, leadership and decision-making, time use and work-life balance. Such data should be regularly provided to UNWTO to ensure an international analysis and comparative insights and conduct gender analysis.



LINK TO OTHER G20 WORKSTREAMS

- **Empower Initiative** particularly on its second priority issue 'Women in MSMEs as Drivers of Economic Growth: Context, Connect and Change'.
- **Women 20** as well as **Youth 20**.

PROPOSAL FOR CONCRETE ACTIONS

- G20 members are encouraged to join and commit to the action plan of the *Global Report on Women in Tourism – Second Edition*,⁵⁰ which provides a framework that provides concrete steps that will help actors in the private and public sectors boost tourism's empowering potential for women;⁵¹ and
- **Leveraging G20 EMPOWER Alliance** though increasing its network of women leaders and entrepreneurs in the tourism sector.

8

Integrate the targeting strategies within the women and youth labour market profiling to make it easier for the public and private sectors to reach youth and women in occupational categories.

This is particularly important at the lower layers of the skill structure. It will include the training or drilling skills, knowledge of women and youth so as it will strengthen data centres for tourism and business, thus reduce risk of failure in entrepreneurship.

⁵⁰ World Tourism Organization (2019/a).

⁵¹ Access the Action Plan through the following publication:
World Tourism Organization (2019/a), *Global Report on Women in Tourism – Second Edition*, UNWTO, Madrid,
DOI: <https://doi.org/10.18111/9789284420384>.
Direct link to the Action Plan: https://www.e-unwto.org/pb-assets/unwto/191121_action_plan_women_in_tourism_2nd_ed.pdf [12-08-2022].

PILLAR 4

CLIMATE ACTION, BIODIVERSITY CONSERVATION AND CIRCULARITY

As outlined in the One Planet Vision for a Responsible Recovery of Tourism from COVID-19 which was released by UNWTO in June 2020 and subsequently reaffirmed in the UNWTO Recommendations for the Transition to a Green Travel and Tourism Economy, developed in 2021 in partnership with the G20 Tourism Working Group, recovering from the pandemic must also tackle the underlying reasons for sustainability challenges, such as unsustainable consumption and production patterns.

Sustainable consumption and production approaches are based on an understanding of the systemic linkages to environment and social outcomes of the entire life cycle of economic activities. By integrating sustainable consumption and production in the tourism value chain, solutions that go beyond technical resource efficiency measures can be developed to ensure outcomes across sustainability dimensions. Sustainable consumption and production patterns have the potential to address the triple planetary crisis of climate challenges, biodiversity loss, and waste and pollution.

CLIMATE ACTION

According to UNWTO/ITF research released in December 2019 on the occasion of the United Nations Climate Change Conference – COP 25 – in Madrid, the tourism sector was estimated to increase its emissions by at least 25% by 2030 if the current climate ambitions of the sector remain unchanged.⁵² While the COVID-19 pandemic led to a reduction of greenhouse gas (GHG) emissions globally in 2020, emissions already rebounded in 2021 reaching their highest absolute levels ever.⁵³ It is therefore expected that emissions from tourism would also rapidly rebound as operations restart, and hence the need to transform tourism operations for climate action continues to be of utmost importance for the sector to remain in line with goals of the Paris Agreement, reflecting equity and the principle of common but differentiated responsibilities and respective capabilities, in the light of different national circumstances.⁵⁴

52 World Tourism Organization and International Transport Forum (2019), *Transport-related CO2 Emissions of the Tourism Sector – Modelling Results*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284416660>.

53 International Energy Agency (2022), *Global Energy Review: CO2 Emissions in 2021*, IEA, Paris, online available at: <https://www.iea.org> [22-08-2022].

54 United Nations Climate Change (2015), 'Article 2(b)', *Paris Agreement*, online available at: <https://unfccc.int> or https://unfccc.int/files/meetings/paris_nov_2015/application/pdf/paris_agreement_english_.pdf [13-09-2022].



Transforming tourism operations for climate action requires, among others:

- Promoting the introduction of targets based on science and measurement and disclosure of GHG emissions;
- Enhancing mitigation and adaptation efforts to reduce GHG emissions of tourism operations and value chains, including climate-aware tourism promotion, scaling up rail and electric charging infrastructure, as well as fostering the availability of all inclusive, affordable, reliable and viable energy systems; and
- Reinforcing the engagement of the tourism sector in adaptation to climate change and emission removal.

In November 2021, at UNFCCC COP26 in Glasgow, UNWTO launched the Glasgow Declaration on Climate Action in Tourism with the aim of building a consistent approach that will accelerate climate action in tourism.

The Declaration, which is a voluntary commitment to accelerate climate action in tourism, has already been subscribed by more than 500 signatories, including countries, businesses, destinations and supporting organizations.



BIODIVERSITY CONSERVATION

The COVID-19 pandemic has raised awareness of the importance of a healthy environment as a natural barrier for future pandemics, notably in the case of zoonotic diseases.⁵⁵ Biodiversity decline risks causing dangerous and irreversible breakdowns of terrestrial, freshwater and ocean ecosystems, threatening the foundations of social and economic provisioning systems. To mitigate the threat of biodiversity loss, consumption and production should follow the flow of natural resources along supply chains.⁵⁶

A healthy environment is also directly connected with the competitiveness of the tourism sector. In many destinations, the conservation of marine and terrestrial ecosystems, protected areas and species largely depends on tourism revenue and operators. Enhancing such conservation efforts can enable a more sustainable recovery and contribute to fighting illegal wildlife trade. Supporting the development of monitoring mechanisms that would regularly capture the value of conservation through tourism would enable the tourism sector to capitalize on its conservation efforts.⁵⁷ To mitigate the threat of biodiversity loss, consumption and production along supply chains should align with sustainability and circularity principles, including regeneration of ecosystems, taking into account national circumstances, needs and priorities.

At the same time, investing in nature-based solutions has to drive innovation in tourism towards sustainability and – besides mitigating the environmental impacts of tourism activity, actions should also be adapting to those impacts – resulting in better management and regeneration of scarce natural resources such as water, coral reefs, wetlands, mangroves and coastlines, and foster disaster resilience both in urban and natural environments.⁵⁸ Investments in nature-based solutions also respond well to the expectations of a growing demand for experiences in nature while producing both environmental and livelihood benefits for local communities.

Tourism is well positioned to contribute to the Post-2020 Global Biodiversity Framework⁵⁹ by supporting conservation, sustainable use and also equitable sharing of benefits. The importance of visitor fees to sustain protected areas, and the fact that 40% of protected areas are managed by indigenous communities who depend on tourism as complementary income, is a case in point to promote a stronger link between tourism and conservation. Additionally, the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) posits that wildlife watching, a form of nature-based tourism, raises awareness and facilitates connections to nature, in addition to bringing local benefits, such as direct income generation, to local communities. In 2018, wildlife watching contributed

55 Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services – IPBES (2020).

56 International Resource Panel (n.d.), 'Building Biodiversity', IRP, online available at: <https://www.resourcepanel.org/reports/building-biodiversity> [22-08-2022].

57 World Tourism Organization (2021/b), *Recommendations for the Transition to a Green Travel and Tourism Economy*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422814>.

58 https://platform.think-nature.eu/system/files/thinknature_handbook_final_print_0.pdf

59 Convention on Biological Diversity (2021), *A New Global Framework for Managing Nature through 2030*, Montreal, online available at: <https://www.cbd.int/article/draft-1-global-biodiversity-framework> [22-08-2022].



USD 120 billion to global gross domestic product (five times the estimated value of the illegal wild species trade), sustaining 21.8 million jobs.⁶⁰ The relevance and links of tourism to protected areas has also become evident during the pandemic in two ways:

1. The increased visitation in some natural areas, namely in Europe and North America, which led to the need to implement restrictions and access mechanisms; and
2. The lack of resources from tourism threatened many protected areas, particularly in Africa where natural parks suffered a significant decline in visitation.⁶¹ IPBES reports that, prior to the COVID-19 pandemic, protected areas received 8 billion visitors globally and generated USD 600 billion per year, with species-rich countries experiencing the highest increases in rates of tourism visitation.⁶²

While long-distance transportation for tourism has grown dramatically over the last 20 years with international departures and arrivals tripling globally, intensive tourism significantly increased the presence of invasive alien species (IAS) which threaten native species and ecosystem health.⁶³ Thus, it remains an urgent task to further promote coordinated action on IAS.⁶⁴

The High Level Panel for a Sustainable Ocean Economy convened its 25th Member Representative meeting in Mexico City on 9 May 2022 to reflect on the work of the Ocean Panel thus far, to discuss how to accelerate the delivery of the ocean action agenda and raise the profile ocean issues on the international stage. During the meeting, representatives discussed a variety of topics that included improving and implementing sustainable tourism measures, food from the sea as a way to address food insecurity and advancing goal-based plans for the sustainable and equitable development of ocean areas. The meeting was the first in-person representative meeting since the COVID-19 pandemic began, as well as a pivotal point in 2022, hailed as the Ocean Super Year. The Ocean Super Year is a plethora of opportunities for the Ocean Panel to highlight the solutions the ocean presents and the importance of transitioning to a sustainable ocean economy where sustainable production, effective protection and equitable prosperity go hand-in-hand.

60 Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services – IPBES (2022), *Summary for policymakers of the thematic assessment of the sustainable use of wild species of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services*, IPBES secretariat, Bonn, DOI: 10.5281/zenodo.6425599 and online available at: <https://zenodo.org/record/6810036#.YsgYNPftXDt> [01-09-2022].

61 European Commission, Directorate-General for International Partnerships and Spenceley, A. (2021), *Tourism and visitation to protected areas amid COVID-19 – Guidance for protected area authorities and managers*, Publications Office of the European Union, DOI: <https://data.europa.eu/doi/10.2841/772>.

62 Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services – IPBES (2022).

63 Brondízio, E.S.; Settele, J.; Díaz, S. and Ngo, H.T. (eds.) (2019), *The global assessment report on biodiversity and ecosystem services*, IPBES secretariat, Bonn, Germany, ISBN: 978-3-947851-20-1, online available at: https://ipbes.net/system/files/2021-06/2020%20IPBES%20GLOBAL%20REPORT%28FIRST%20PART%29_V3_SINGLE.pdf [22-08-2022].

64 see e.g. European Commission (n.d.), 'Invasive Alien Species', EC, Brussels, online available at: <https://ec.europa.eu/environment/nature/invasivealien/> [22-08-2022].



CIRCULARITY

The COVID-19 crisis has raised awareness of the importance of local supply chains and the need to rethink how goods and services are produced and consumed, both key elements of a circular economy. Integrating circularity and further advancing resource efficiency in the tourism value chain represent an opportunity for the tourism sector to embrace a sustainable and resilient growth pathway.

Before the COVID-19 pandemic, the circular economy was being increasingly discussed as a strategic approach for the tourism sector, notably from the point of view of minimizing its environmental impacts, given the potential of circularity to decouple growth from sustainable resource and land use. Currently, the discussion on circularity also emphasizes the capacity of circular economy to provide societal benefits, including sustainable jobs, and build resilience.

The integration of circular economy principles and practices in tourism is in its initial stages but has significant potential given that tourism is trade in services.⁶⁵ The extensive transversal value chain of tourism offers numerous opportunities to make longer, better more circular use of the materials and products

utilized to deliver tourism services, creating value and partnerships, and bringing landfill waste as close to zero as possible.

For tourism businesses, circularity can bring increased competitiveness, not only in connection with opportunities for innovation, differentiation and the diversification of income streams. The circular economy allows businesses to take responsibility for the impacts of their operations while creating competitive advantages in the long term and promoting employee and customer retention. **For tourism destinations**, circularity, including circular economy, offers the opportunity to enhance sustainable development, generating wellbeing for the local population through the creation of new jobs and more inclusive local value chains, thus creating a virtuous circle between businesses and territories. **For tourists**, the circular economy brings an opportunity to leave a positive footprint, to travel with purpose, and can lead to multiplier effects when it comes to the transformation of the whole tourism ecosystem through behaviour change.

Circularity as an overarching approach with processes such as reducing and reusing, repairing, refurbishing, remanufacturing, repurposing and recycling can reduce economic leakages in the tourism value chain, as well as waste and pollution.⁶⁶ Food represents an entry point for

65 World Tourism Organization (2019/d), 'Tourism in The World Trade Organization (WTO) Aid For Trade Global Review 2019', press release, UNWTO, Madrid, online available at: www.unwto.org [22-08-2022].

World Trade Organization (2019), *Aid for Trade Global Review 2019: Supporting Economic Diversification and Empowerment*, WTO, Geneva, online available at: https://www.wto.org/english/tratop_e/devel_e/a4t_e/gr19_e/gr19programme_e.htm [22-08-2022].

66 United Nations Environment Programme (n.d./b), UNEP circularity platform, online available at: <https://buildingcircularity.org/> [22-08-2022].



https://www.e-unwto.org/doi/book/10.18111/9789284423828 - Thursday, October 27, 2022 2:25:26 PM - IP Address: 189.146.122.241

circularity in tourism value chains, notably in connection with food waste reduction which also presents an opportunity for businesses to reduce costs and improve efficiency while curbing GHG emissions. Addressing plastic pollution can also be a catalyzer for circularity in tourism and, beyond reducing marine litter, contribute to the preservation of the attractiveness of destinations while creating new jobs and triggering multi-stakeholder precompetitive collaboration on topics such as waste management at the destination level, which in turn can have a positive effect on human and ecosystem health.

Among several initiatives in this area, in January 2020, UNEP and UNWTO, in collaboration with the Ellen MacArthur Foundation (EMF), launched the Global Tourism Plastics Initiative (GTPI) proposing a common vision for tourism stakeholders to transition to a circular economy for plastics. The initiative aims to work across the tourism value chain with relevant stakeholders including suppliers and waste management platforms, accommodation (large multinational companies and SMEs), tour operators, cruise lines and online booking platforms. The GTPI is aligned with the New Plastics Economy Global Commitment,⁶⁷ also led by EMF in collaboration with the UNEP, and operates as its tourism sector interface. It fosters that tourism businesses,

destinations and supporting organizations are committing to a set of ambitious and actionable targets around the elimination of unnecessary and problematic plastics, the introduction of reuse models and collaboration on value chain level to increase recycling rates and recycled content. In 2021, the GTPI increased its signatories by 250% (from 46 to 115) and was officially presented by the UNWTO Executive Council, which encouraged UNWTO Member States to take an active role in the initiative. The GTPI is led by UNEP and UNWTO in collaboration with EMF. The initiative supports the tourism sector enhancing its readiness for the upcoming international treaty on plastic pollution.⁶⁸

Yet, several barriers are preventing firms from capturing circular economy opportunities. Key barriers include the need to overcome existing habits and customs, the unintended consequences of existing regulations, high upfront costs, other financial barriers, as well as lack of enabling infrastructure and investment. MSMEs will be particularly important to engage in circular economy efforts yet often face barriers to implementing changes due to skill gaps, lack of information and awareness of capital requirements.

67 The New Plastics Economy Global Commitment provides a suitable framework for governments wanting to address the shift towards a circular economy of plastics in their economies (beyond the tourism sector). The Global Tourism Plastics Initiative is fully aligned with the New Plastics Economy Global Commitment. For more information, please visit Ellen Macarthur Foundation (n.d.), 'Looking ofr the New Plastics Economy?', online available at: <https://www.newplasticseconomy.org/projects/global-commitment> [01-09-2022].

68 For more information, please visit: World Tourism Organization (n.d./a), 'Global Tourism Plastics Initiative', UNWTO, Madrid, online available at: <https://www.unwto.org/sustainable-development/global-tourism-plastics-initiative> [22-08-2022].



THE NEED FOR A PARADIGM SHIFT

As outlined above, the development of these situations demands a transformation for the tourism sector, both in the context of tourism sector management in the economic aspect but also in relation to environmental issues, health, the use of technology and community empowerment in realizing tourism that is resilient, of high quality, sustainable, inclusive and people-centred. As such, there is a need to reform the tourism policy framework, and to shift it from a growth-oriented paradigm that solely relies on the increasing visitor numbers as the primary objective, without considering the capacity to deal with increased tourism or other akin policy goals⁶⁹ to one with a better integrated policy that is capable to deal with significant interconnected policy challenges, and able to produce a sustainable vision. The success of tourism should not be measured in visitor numbers alone, but also focus on the positive impacts that tourism can provide

at the local level, i.e., benefits to local economies and communities, as well as its external impacts on society and the environment.

It is not without consequence that transitioning to a more sustainable model of tourism development will require a substantial investment. Financial sourcing for such investment is the main challenging part. The suitability of available finance instruments, perceived impact of sustainable investment in tourism, incentives (or disincentives) to implement sustainable business practices, and the policy framework support are some of the obvious challenges in this regard, taking into consideration different national circumstances, needs and priorities. The limited understanding on the impacts of tourism on destinations and local communities are also hindering the development and implementation of evidence-based, long-term strategic plans with the aim of developing tourism in a sustainable manner.

69 Peeters et al. (2018).



UNWTO believes that investments could accelerate more sustainable transitions in the tourism sector. The pandemic opened up opportunities for green buildings and retrofitting. The need to reduce emissions present a USD 24.7 trillion investment opportunity in the green buildings sector of emerging market cities between now and 2030. This represents a USD 1.5 trillion opportunity in hotels and restaurant buildings alone. This is a formidable driver to create investment opportunities as it promotes sustainability through cost efficiency, brand equity and better guest satisfaction, and respond to the increasing demand and new consumer behaviour favourable towards sustainability.

For this purpose, UNWTO has been collaborating with the International Finance Corporation (IFC) promoting green finance mechanisms to create new markets for green retrofits by providing integrated offering of advisory, technical support and capital; with the purpose to facilitate retrofit greening by providing hotels with access to financing through local financial institutions. This

programme involves countercyclical financing for hotels to stimulate medium-term post-COVID-19 recovery of the hotel sector, leveraging low occupancy to retrofit and acquire new assets, with the ultimate purpose to preserve jobs in emerging markets, targeting small and medium hotels.

As an initiative led by international organizations during the COVID-19 crisis, the exchange of information across levels of government, the private sector and internationally has been crucial for decision-making and managing the pandemic. Capitalizing on lessons learned will be key to implement recovery plans efficiently and enhance global resilience. More inclusive and smart destination management and partnerships can lead the way for sustainability to play a pivotal role in the recovery of tourism.

GUIDELINES – PILLAR 4

CLIMATE ACTION, BIODIVERSITY CONSERVATION AND CIRCULARITY



1

Accelerate the transition towards low GHG emissions in tourism.

Enhancing mitigation efforts to reduce emissions in the tourism sector, including through investments to develop low-GHG emissions transportation options, sustainable and green infrastructure and operations, is key to resilience, sustainable and green infrastructure and operations, as well as to addressing the growing demand from consumers for more sustainable tourism supply.⁷⁰

2

Engage the tourism sector in emission removal.

Supporting the engagement of the tourism sector in adaptation to climate change and GHG emissions removal, through both natural and technological methods is necessary. The use of nature-based solution systems for carbon removal through the restoration of high carbon density ecosystems, as well as engaging with technologies that would abate, avoid and remove emissions.

3

Capture the value of conservation through tourism.

While the reduction of economic activity during COVID-19 has to some extent reduced the pressures on the environment, there are many destinations where the conservation of marine and terrestrial ecosystems, protected areas and species largely depends on tourism revenue and operators. Supporting monitoring mechanisms that would regularly capture such contribution and the value of ecosystem services through tourism at destination level would enable the tourism sector to capitalize on its conservation efforts taking into account different national circumstances, needs and priorities.

⁷⁰ In the case of the European Union member states are bound by the EU emission trading system (EU ETS).
United Nations Climate Change (2015), 'Article 6'.



4

Support conservation efforts through tourism.

This is including through policy and regulatory functions to support multi-use protected areas. The uptake of carefully targeted marine park zoning is an effective model for sustainable tourism management, which can support environmental, social and economic priorities, and enable full participation of coastal communities and indigenous peoples. The risk of poaching, encroachment or overexploitation grew in wildlife destinations as tourism was on hold, directly threatening the very assets upon which the tourism sector needs to be rebuilt. The role of tourism to sustain conservation and fight illegal wildlife trade, as well as the need to reduce the movement of invasive alien species through tourism⁷¹ should therefore be acknowledged in recovery plans and support made available for conservation efforts by tourism stakeholders to continue. Tourism also contributes to the preservation of cultural and historical sites.

5

Invest in nature-based solutions for sustainable tourism.

Nature-based solutions⁷² have potential to drive innovation in tourism towards sustainability and, besides mitigating the environmental impacts of tourism activity, result in better management of scarce natural resources such as water, coral reefs, wetlands, mangroves, posidonia meadows and coastlines, and foster disaster resilience both in urban and natural environments.⁷³ Investments in nature-based solutions also respond well to the expectations of a growing demand for experiences in nature, while providing both environmental and livelihood benefits to local communities.

71 Council of Europe (2017), *European Code of Conduct on International Travel and Invasive Alien Species*, Strasbourg, online available at: <https://www.coe.int/en/web/portal/home> and <http://rm.coe.int/090000168075e833> [22-08-2022].

72 Nature-based solutions are locally appropriate actions that address challenges such as climate change and provide human well-being and biodiversity benefits by protecting, sustainably managing and restoring ecosystems. United Nations Environment Programme (n.d./a), 'Environment Security', UNEP, Nairobi, online available at: <https://www.unep.org/explore-topics/disasters-conflicts/what-we-do/nature-based-solutions> [22-08-2022].

73 https://platform.think-nature.eu/system/files/thinknature_handbook_final_print_0.pdf.



6

Invest in the transition of tourism value chains towards circularity.

Circular economy processes such as reducing and reusing (user to user), repairing, refurbishing and remanufacturing (user to business), repurposing and recycling (business to business) can reduce economic leakages in the tourism value chain, as well as waste and pollution.⁷⁴ Supporting the integration of circular economy processes in tourism is an opportunity which can promote innovation, the creation of new sustainable business models and jobs with added value for customers and local economic development.⁷⁵ The efficient use of energy and water are essential measures.

7

Prioritize sustainable food approaches for circularity.

Food represents an entry point for circularity in tourism value chains through sustainable procurement (local and organic sourcing, sourcing from market surplus or collective procurement), sustainable menus (including healthy and plant-rich dishes) and food waste and loss reduction and management. Mainstreaming food loss and waste reduction in tourism has potential to support the recovery of small and large businesses as it presents an opportunity to reduce costs and improve efficiency while curbing GHG emissions. Encouraging circularity in the food value chain of the tourism sector also offers opportunities for local food security in addition to cost and emissions reductions. A focus on indigenous flora and fauna can also promote biodiversity and habitat protection

⁷⁴ United Nations Environment Programme (n.d./b).

⁷⁵ International Labour Organization (2020/a), *COVID-19 and the world of work – Jump-starting a green recovery with more and better jobs, healthy and resilient societies*, ILO, Geneva, online available at: <https://www.ilo.org/global/lang-en/index.htm> [22-08-2022].

8

Shift towards a circularity of plastics in tourism.

Addressing plastic waste and pollution can be a catalyzer of circularity in tourism through the elimination of unnecessary and harmful plastics, integrating reuse models safely, engaging the value chain to advance the use of recyclable materials and collaborating to increase recycling rates for plastics.⁷⁶ The increased use of personal protective equipment during the pandemic has exacerbated the need to take action on plastic pollution. Supporting the shift towards circularity in the use of plastics can reduce marine litter and plastic pollution, preserve the attractiveness of destinations and trigger multi-stakeholder precompetitive collaboration on topics such as waste management at destination level, which in turn can have a positive effect on human and ecological health.

9

Steer recovery funds towards sustainable tourism and promote sustainable finance mechanisms

in collaboration with the multilateral and private sector to create new markets for green investments by providing integrated offering of advisory, technical support, and capital; with the purpose to facilitate access to financing through greener instruments to stimulate medium-term post-COVID-19 recovery, taking into account national and regional contexts and circumstances, but also fostering the diffusion of technologies to enable digitalization and climate resilience of the tourism sector. Financing for the recovery of tourism should strive to balance the urgent support needed for business survival, job retention and the restart of tourism operations with longer-term goals such as ecosystems protection and climate change mitigation and adaptation, and waste reduction which not only affect the global economy but also offer opportunities for creating sustainable and decent jobs.

LINK TO OTHER G20 WORKSTREAMS

- **Environment and Climate Sustainability Working Group**, particularly on its first priority issue namely 'promoting sustainable recovery' on which the working group seeks to establish a "guidance on the implementation of the Post-2020 Global Biodiversity Framework", as well as its second priority issue which is 'Enhancing Land and Sea based Actions to Support Environment' on which the working group aims to create G20 Action Plans on enhancing cooperation on ecosystem-based actions (coastal, etc) and ocean-based climate actions;
- **Energy Transition Working Group**, particularly on its priority issues 'Smart and Clean Technologies Scaling Up' and 'Advancing Energy Financing', and
- **Business 20.**

PROPOSAL FOR CONCRETE ACTIONS

G20 members are **encouraged to take an active role in the Glasgow Declaration on Climate Action in Tourism**, which provides a framework to accelerate measurement, mitigation and adaptation efforts in tourism, as well as in the **Global Tourism Plastics Initiative** that unites the tourism sector behind a common vision of a circular economy of plastics.

76 World Tourism Organization (n.d./a).

PILLAR 5

POLICY, GOVERNANCE AND INVESTMENT FRAMEWORKS

CRISIS RECALLS THE IMPORTANCE OF POLICY AND GOVERNANCE

One of the key outcomes of the COVID-19 crisis has been the importance of adequate governance mechanism in the tourism sector that allow for the coordination and cooperation among tourism stakeholders, among the various levels of governments and among tourism and other relevant sectors.

At the same time the changes emerging from post-crisis, and accelerated in the last two years, recall the importance of strengthening public-private partnerships and working with and for communities. Moving forward governments should work closely with communities and destination management organizations to build tourism capacity and address challenges, including planning and funding. Such enhanced governance will require:

- Greater coordination and coherence of public and private sector actions;
- Stronger governance mechanisms for a whole of government approach;

- New approaches to industry engagement;
- New models of community development through tourism; and
- Stronger destination marketing/management organizations (DMOs).

Finally, tourism is a cross-cutting issue. Tourism governance must be built through collaboration to create a tourism ecosystem that is resilient, effective and competitive. A consistent focus on sustainability can bring various actors together, provide new areas of work and attract potential investment. Participatory approaches which involve local stakeholders are key to success. Therefore, building strong governance related to the ecosystem starting from the central, regional and local governments is essential. Lastly, the rapid development of tourism, government commitment and success in the tourism sector should be capitalized on by inviting more investment. Promoting sustainable investment is essential to fostering sustainable growth and building local communities and MSMEs.



INVESTMENT FRAMEWORK

The COVID-19 pandemic has made clear that sustainable tourism requires sustainable investments at the centre of new solutions, and not just of traditional investments that promote and underpin economic growth and productivity. It has also highlighted the importance of non-traditional investments that enhance innovation through the creation and dissemination of new solutions to decarbonize the sector. To harness the advantages of investments, it is critical that governments promote policies, as well as new investment vehicles to recover, retain and attract foreign direct investments (FDI).

While international travel picked up in 2021, foreign direct investment (FDI) in the tourism cluster remained largely subdued, as the sector continues to stagnate following the coronavirus pandemic and the ensuing economic volatility. FDI project numbers in the tourism cluster fell by a further 8% in 2021, from 271 investments in 2020 to 250 in 2021. Job creation and capital investment in tourism FDI over the period also declined by 34% and 42%, respectively.⁷⁷

The lack of connectivity infrastructure is still happening; and there is a need for funding for the development of infrastructure. However, the public-private partnership practice in the sector is still not optimally developed.

With the rise of the green and sustainable movement, many investors are leaning toward green and sustainable investment, meaning that the industry has to adapt its practices, taking into account national and regional contexts to be environmentally friendly, which can take a long time, particularly for refurbishment of ageing assets, however there is the opportunity to produce strong return on investment (ROI) from efficiency gains.

The estimated losses caused by COVID-19 in the tourism sector produced high employment of unskilled labour which will vary naturally according to the proportion of unskilled labour employed in the tourism sector in each country. Tourism is an important source of income for many developing countries accounting for 50% of total exports for many small economies, particularly small islands developing states. Tourism has relatively low barriers to entry and employs a high share of young people and women.

⁷⁷ FDIntelligence (2022), 'Global greenfield investment trends in tourism', *Tourism Investment*, August 2022.

GUIDELINES – PILLAR 5

POLICY, GOVERNANCE AND INVESTMENT FRAMEWORKS

1

Align tourism development with the 2030 Agenda for Sustainable Development

by actively engaging in national Sustainable Development Goals (SDGs) processes, strengthening SDG engagement and commitment from all stakeholders in tourism: communities, civil society organizations, local/municipal authorities, private sector, financiers and investors.

2

Strengthen whole of government, multi-level coordination for tourism planning and management and community development.

This includes adopting an integrated approach to inclusive community development through a whole-of-government approach and effective cooperation and coordination at all levels – community and local, through destination marketing/management organizations (DMOs). To that end, it will be essential to strengthen the skills and capacity of DMOs to effectively plan and manage their destinations.

3

Enhance tourism governance through public-private-community partnerships (PPCPs), which enable the collective development of tourism products and services, as well as the management of community resources for mutual benefit through jointly assuming risks and responsibilities while sharing resources and competences.

- Successfully transitioning to a more sustainable, inclusive and resilient tourism model will largely depend on public private collaboration and partnerships;
- Enhancing collaboration and promoting social dialogue between government, employers and workers organizations, as well as other key stakeholders along the tourism value chain, internationally and at destination level; and
- Prioritizing inclusive participatory approaches is crucial to ensure an efficient implementation of recovery plans.



4

Promote human capital development through targeted policies and programmes for education and capacity building for communities attending to diversity and inclusion,

including self-governance within communities that enable efficient decision-making, ownership and leadership concerning tourism. Empowering communities to better engage and promote tourism development requires specific skills, adequate workforce housing, and amenities, especially in the contexts of local communities, attracting staff and any tourism development affecting their lives.

5

Enable frameworks for tourism investments,

which requires new quality data and knowledge to go beyond the attraction and promotion of investments, towards smart and sustainable investments that expands the value of MSMEs and impacts positively on communities. This also requires the participation of stakeholders beyond the public-private-community partnerships in order to understand the nature and dimensions of the tourism sector. The generation of data-driven frameworks should allow to measure equity and non-equity tourism FDIs, as well as its impact on labour, technology and sustainability.



6

Promote strategies and schemes to safeguard tourism investment, in coordination with investment promotion agencies (IPAs) and their respective governments.

The strategy could be grouped around two phases:

1. The main aim of the first phase is focussed on the retention and survival of existing investors in the realm of tourism; while
2. The second phase is focussed on rethinking tourism investment strategy while considering the long-term implications of the crisis on the tourism sector and its recovery.

7

Strengthen support for tourism investment from financial institutions, including international financial institutions, and foster the development of alternative modes of finance.

Banks, other financial institutions and trade bodies should be encouraged to pay more attention to the financing of tourism as a form of trade and a vehicle for sustainable economic growth. Tourism may benefit from openness to alternative modes of finance, particularly investment and financing that include asset-based, risk-sharing modalities. Strengthening environmental, social and governance (ESG) frameworks will help in achieving sustainable tourism investment.



8

Ensure that tourism is integrated in overall crisis management policies and actions.

Often tourism is highly affected by natural and man-made crises. Therefore, the needs of tourism should be understood and fully integrated in overall crisis management policies and actions, requiring close collaboration across government and between tourism bodies, other sectors and stakeholders, especially those responsible for the provision of emergency services. Safeguard the tourism sector by promoting a common understanding of resilience that identifies risks in tourist destinations, correlations and risk drivers, and applies possible courses of action that are realistic and practicable in a participatory process. Resilience for communities, destinations and MSMEs can be established through risk-informed management and policies, which integrate existing and future climate and disaster risks in political and development decision-making.

9

Develop procedures for meeting the needs of tourists affected by crisis situations and adhere to the Global Code for the Protection of Tourists.

Travellers caught up in a crisis away from home should be given priority assistance. Plans could include procedures to track and trace travellers, establish their condition, give essential information and provide assistance.⁷⁸ This may include the use of geo-located mobile devices, apps and possibly big data, while following international standards and procedures to respect data privacy.

⁷⁸ World Tourism Organization (2020), *Recommendations for the Assistance to International Tourists in Emergency Situations*, UNWTO, Madrid, online available at: www.unwto.org [22-08-2022].



10 Improve tourism data, including the use of big data,⁷⁹ for evidence-based policymaking, planning and management, and advance towards the Measurement of Sustainability in Tourism

in line with the UNWTO Measuring the Sustainability of Tourism framework. At the same time, it is essential to enhance the use of big data in tourism; therefore, governments need to cooperate with the private sector and develop a legal framework to support data sharing.

11 Enhance international cooperation and official development assistance through tourism, with a particular focus in the recovery and resilience of MSMEs and communities.

This includes assisting communities in accessing funds to help set up their priority support facilities, including healthcare, sanitation, communication, accessibility and education infrastructure, as well as develop necessary tourism infrastructure and services, encouraging at the same time the role of tourism in inclusive community development through official development assistance agencies, as well as international and regional financing institutions.

⁷⁹ Asian Development Bank and World Tourism Organization (2021), *Big Data for Better Tourism Policy, Management and Sustainable Recovery From Covid-19*, ADB/UNWTO, Manila and Madrid, DOI: <https://doi.org/10.18111/9789284423095>.



LINK TO OTHER G20 WORKSTREAMS

With regard to pillar 5, the Tourism Working Group should consider collaborating and ensuring cross referencing with the work of:

- **Development Working Group**, particularly on its first priority issue 'Strengthening Recovery and Resilience to Withstand Future Crises' upon which the working group seeks to formulate a deliverable dubbed as 'G20 Roadmap to Stronger Recovery and Resilience in Developing Countries, LDCs and SIDS'.
- **Trade, Investment and Industry Working Group**, particularly on its priority issue 'Spurring Sustainable and Mutually Beneficial Investments'.
- **G20 Health Working Group**, particularly priority two on 'Harmonizing global health standards' focussed on the Harmonization of COVID-19 and other Vaccine-Preventable Diseases (VPD) Certificate Recognition at Point of Entry.
- **Business 20**.

PROPOSAL FOR CONCRETE ACTIONS

1. Evaluate collaborating with international organizations by facilitating information for the development of a **central online tool and application that can provide comprehensive, transparent and updated information on global travel requirements**. This plays a critical role in enhancing travellers' confidence and promoting seamless travel. Furthermore, any information tool could be used and/or adapted to any future situations/crises that lead into border or other mobility restrictions, thus contributing to enhance travel safety, security and resilience.
2. Support the processes of harmonization of travel protocols and mutual recognition of COVID-19 vaccine certificates being developed by the G20 Health Working Group while respecting the national sovereignty of each State in this matter.



05 CONCLUSION

RECOVER TOGETHER, RECOVER STRONGER

The COVID-19 pandemic has accelerated the many challenges facing society – from climate change, biodiversity loss and waste challenges to the growing inequalities within and between countries, passing by the digital revolution. It has also stressed the importance of coordination and solidarity and the need for enhanced multilateralism to address global and interconnected challenges.

The G20, born of the 2009–2010 economic crisis, can and should lead in shaping the global post-pandemic transformation ensuring the achievement of the 2030 SDGs targets are on track.

Balancing the interest and priorities of G20 developed and developing countries, the Group can work together to enhance sustainability, resilience and inclusion in trade, investment, employment, agriculture, health, education, human capital and MSMEs.

Tourism, one of the most relevant and cross-cutting economic sectors, but also one of the most affected by the pandemic, can and should play a key role in such process but only through a holistic governance and policy approach that supports and accelerates the transformation of **two core elements of the tourism sector: MSMEs and communities**. They are the most vulnerable part of the tourism value chain but also the most important in a people-centred recovery and future.

In this sense, the implementation of the above guidelines and proposed concrete actions can effectively contribute to address some of the global challenges identified by the Indonesian Presidency, namely:

- Off track achievement of the Sustainable Development Goals;
- Disrupted global supply chains;
- Unbalanced restriction of international mobility;
- Increasing risks related to climate change;
- Lack of food security;
- Environmental sustainability disturbances;
- Energy shortage;
- Potential gap on financing pandemic prevention, preparedness and response;
- Downside risks on fiscal sustainability;
- Price instability and inflation pressure; and
- Inequality on vulnerable groups and countries.



ANNEX 1 SURVEY OF G20 AND GUEST COUNTRIES – RESULTS

A1.1

TOURISM IN THE G20 ECONOMIES



The information included in this annex results from a survey conducted among G20 and guest countries between January and July 2022 (see annex 4). It comprises information from 19 out of 27 surveyed countries, among which 17 out of 20 G20 members.

Table A1.1: Overview of tourism in the G20 economies, 2019 and 2021

Overview of international tourism and its economic importance in the G20 countries, 2019 and 2021								
	International tourism							
	International tourist arrivals		Total revenues ² (exports in balance of payments)		International tourist arrivals per 100 inhabitants		International tourism revenues per capita	
	(million)		(USD billion)				(USD)	
	2019	2021	2019	2021	2019	2021	2019	2021
World	1,465	429	1,750	728	19	5	230	90
G20	1,002	333	1,172	515	21	7	240	110
% of world	68.4	77.6	67	71				
Other	463	96	578	213	16	3	200	70
% of world	32	22	33	29				
European Union (27)	540	210	496	263	122	47	1,115	591
Austria	31.9	12.7	25.9	11.9	360	142	2,923	1,334
Belgium	9.3	3.2	10.6	7.6	82	28	924	660
Bulgaria	9.3	2.7 ¹	4.8	2.7	134	39	696	399
Croatia	17.4	10.6	12.0	10.9	420	13	2,899	2,665
Cyprus	4.0	1.9	3.3	2.0	454	216	3,721	2,246
Czech Republic	14.7	3.9 ¹	8.0	3.4	137	109	745	313
Denmark	14.8	5.9 ¹	8.7	4.5	254	102	1,490	772
Estonia	3.3	0.8	2.3	0.9 ¹	252	5	1,747	657 ¹
Finland	3.3	0.8	5.9	1.6	60	15	1,077	281
France	90.9	48.4	70.9	44.7	138	61	1,089	683
Germany	39.6	11.7	58.4	22.2	48	14	703	267
Greece	31.3	14.7	23.1	13.7	292	25	2,152	1,286
Hungary	16.9	7.9	7.3	4.1	173	8	749	422
Ireland	11.0	..	14.9	3.4	221	..	3,004	681
Italy	64.5	26.9	52.0	25.5	108	45	869	431
Latvia	1.9	0.6 ¹	1.6	0.5	101	34	822	271
Lithuania	2.9	0.9 ¹	1.7	0.6	104	232	604	223
Luxembourg	1.0	0.8	6.3	5.1 ¹	170	119	10,185	8,090 ¹
Malta	2.8	1.0	1.9	0.8	557	157	3,848	1,511
Netherlands	20.1	6.2	23.8	10.4	116	36	1,377	596
Poland	21.2	8.4 ¹	16.0	10.1	56	12	422	268
Portugal	24.6	6.5 ¹	24.6	13.8	239	63	2,394	1,336
Romania	2.7	0.8	4.2	3.6	14	283	219	185
Slovakia	6.4	3.2 ¹	3.4	1.3 ¹	118	16	615	243 ¹
Slovenia	4.7	1.8	3.3	1.5 ¹	226	88	1,611	703 ¹
Spain	83.5	31.2	79.7	34.5	177	66	1,692	729
Sweden	7.4	1.8 ¹	9.2	6.1	72	18	890	581
Argentina	7.4	0.3	5.7	0.4	16	1	126	10
Australia	9.5	0.2	47.9	17.0	37	1	1,875	663
Brazil	6.4	2.1 ¹	6.1	3.0	3	1	29	14
Canada	22.1	3.1	29.8	13.1	59	8	793	343
China	65.7	8.0 ¹	35.8	11.3	5	1	25	8
India	17.9	6.3 ¹	31.7	13.5	1	0	23	10
Indonesia	15.5	3.9 ¹	18.4	0.5	6	1	69	2
Japan	31.9	0.2	49.2	5.2	25	0	390	42
Korea, Republic of	17.5	1.0	25.5	11.1	34	2	492	214
Mexico	45.0	31.9	25.8	20.6	36	25	204	159
Russian Federation	24.6	6.4 ¹	17.2	6.4	17	4	118	44
Saudi Arabia	17.5	3.5	19.8	4.6	51	10	580	131
South Africa	10.2	2.3	9.1	2.1	17	4	154	35
Türkiye	51.2	29.9	41.4	28.5	62	35	498	337
United Kingdom	39.4	10.7 ¹	52.7	22.7	59	16	789	336
United States of America	79.4	22.1	239.1	83.0	24	7	728	250

Sources: World Tourism Organization, World Trade Organization and Organisation for Economic Co-operation and Development.

https://www.e-unwto.org/doi/book/10.18111/9789284423828 - Thursday, October 27, 2022 2:25:26 PM - IP Address:189.146.122.241

	Exports – international tourism				Tourism Satellite Account (TSA) ³	
	Share of total exports		Share of services exports		Tourism as percentage of GDP	Tourism as percentage in total employment
	(%)				(%)	
	2019	2021	2019	2021	2019 or earlier	2018 or earlier
World	6.9	2.6	28.1	12.4	4.0	..
G20	6.0	2.3	24.2	10.6	3.9	≈ 6
% of world						
Other	10.0	3.4	42.0	21.6	5.3	..
% of world						
European Union (27)	6.1	2.9	21.5	10.9	4.5	5.1
Austria	10.2	4.4	33.9	17.0	6.5	6.4
Belgium	1.9	1.1	8.7	5.6	..	6.7
Bulgaria	10.8	5.3	42.4	25	..	..
Croatia	34.9	27.6	69.8	65.1	11.4	..
Cyprus	18.2	9.2	22.6	11.1	..	..
Czech Republic	3.5	1.3	26.2	11.3	2.9	4.5
Denmark	4.4	2.1	10.4	4.8	2.4	8.8
Estonia	9.6	3.8 ¹	28.8	13.5 ¹	5.4	4.3
Finland	5.5	1.4	16.7	4.7	2.6	5.5
France	8.2	5.0	24.1	14.7	7.4	7.5
Germany	3.2	1.1	16.8	5.8	3.9	4.8
Greece	27.8	15.5	51.3	33.3	6.8	10
Hungary	4.8	2.4	24.3	15.8	6.7	9.6
Ireland	3.6	0.7	6.0	1.0	..	10.3
Italy	7.9	3.6	42.9	25	5.9	8.3
Latvia	7.1	1.9	25.1	8.9	4.5	8.5
Lithuania	3.6	1.1	12.6	3.9	3.1	4.9
Luxembourg	4.8	4.1 ¹	5.5	4.6 ¹	..	8.3
Malta	9.5	3.7	11.3	4.4	6.1	..
Netherlands	2.4	1.0	8.6	4.2	4.4	6.3
Poland	4.8	2.4	22.9	12.6	1.2	..
Portugal	23.1	12.9	62.4	43.2	8.0	9.8
Romania	4.0	3.0	14.0	10.8	2.8	..
Slovakia	3.3	1.4 ¹	27.2	13.1 ¹	2.8	6.3
Slovenia	6.1	2.8 ¹	35	18.6 ¹	5.3	7.7
Spain	16.2	6.9	50.7	29.2	11.8	13.5
Sweden	3.9	2.3	12.2	7.8	7.0	3.4
Argentina	7.1	0.5	40.0	4.8	..	..
Australia	14.0	4.4	67.5	37.7	3.1	5.2
Brazil	2.4	1.0	17.9	9.1	..	..
Canada	5.4	2.2	28.4	12.6	2.1	3.9
China	1.3	0.3	12.7	2.9	..	..
India	5.9	2.1	14.7	5.7	3.8	5.6
Indonesia	9.2	0.2	58.2	3.9	4.1	..
Japan	5.4	0.6	23.7	3.1	2.0	9.6
Korea, Republic of	4.0	1.4	25.7	9.1	..	2.3
Mexico	5.3	3.9	82.0	75.5	8.7	6.0
Russian Federation	3.6	1.2	27.5	11.4	3.8	..
Saudi Arabia	6.9	1.7	81.9	39.4	2.2	..
South Africa	8.6	1.6	61.5	23.0	2.8	..
Türkiye	16.9	10.1	65.1	50.2	..	7.7
United Kingdom	6.1	2.6	13.0	5.4	3.2	4.7
United States of America	9.5	3.3	27.3	10.8	2.9	4.3

Notes: 1) Data corresponds to 2020.

2) Total revenues include international tourism receipts in destinations plus passenger transport receipts.

3) TSA data refers to direct contribution. Source for tourism as a percentage of GDP is UNWTO. Source for percentage of employment is OECD.

Table A1.2: Impact on domestic tourism

Country	Overnight stays (million)			Change (%)	
	2019	2020	2021	2020/2019	2021/2020
G20 economies					
Argentina	141.3	81.2	93.4	-42.5	+15.0
Canada ^a	See note	See note	See note	See note	See note
China	6,006	2,879	3,250,0	-52.1	+12.9
European Union	1,515	not availble	not availble		
France ^b	851.0	659.3	643.2 (Sep.)	-22.5	+9
Germany ^c	406	270	244.0 (Oct.)	-33.5	-4.8
Indonesia ^d	722.2	518.7	not availble	-28.2	
Japan	311	168	not availble	-46.0	
Mexico ^e	98	54	not availble	-44.9	
Saudi Arabia	268.8	228.5	324.3 (July)	-15.0	
Spain	119.6	51.2	84.2 (Nov.)	-57.2	+71
South Africa	28.5	17.0	12.5 (Nov.)	-40.4	-20
Türkiye ^f	46.9	31.5	40.152 (Oct.)	-32.8	+42
United Kingdom ^g	99.1	not availble	not availble		
United States of America ^h	not availble	not availble	not availble	-33	+27.5 (estimate)
Guest countries	not availble	not availble	not availble		
Netherlands	25.8	20.2	not availble	-21.7	
United Arab Emirates	8.0	8.6	not availble	+7.5	+9

- Notes: a) Data on income: CAD billion 76.6 (2019); CAD billion 47.5 (2020); CAD billion 40.5 (Jan–Sep. 2021). –33% 2021 vs 2019.
b) Includes commercial and non market accommodation.
c) Includes arrivals and overnight stays in accommodation establishments with 10 or more bed places or on tourist camp sites with 10 or more camping pitches.
d) Based on mobile data positioning.
e) Nights in hotels and similar establishments.
f) Ministry of Culture and Tourism Survey (licensed by the Ministry and the Municipality).
g) Domestic Tourism Survey suspended in 2020 and Q1 2021.
h) Domestic persons trips (DPT); US Travel Association, estimate.

Source: G20 and Guest Countries Survey. Not revised by UNWTO.

Table A1.3: Impact on employment – Employment in the Tourism Industries

Country	Full time jobs (× 1,000)			Change (%)	
	2019	2020	2021	2020/2019	2021/2020
G20 economies					
Argentina ^a	1.260	not availble	not availble		
Brazil	2.100	1.700	not availble	-19.0	
Canada ^b	0.692	0.490	486 (Sep.)	-29.2	-30 (Jan.-Sep. vs 2019)
China	5.161	not availble	not availble		
European Union	16.300	not availble	not availble		
France ^c	2.000	not availble	not availble		
Germany ^d	2.900	not availble	not availble		
India ^e	76.000	79.600	not availble	+4.7	
Indonesia	14.960	13.460	not availble	-10.0	
Japan	0.260	0.240	not availble	-7.7	
Mexico	2.286	2.005	not availble	-12.3	
Spain	2.395	2.067	2.307	-13.7	+11.6
South Africa ^f		2.596 (Q3)	2.448 (Q3)		-5.7 (Q3)
United Kingdom	1.700	not availble	not availble		
United States of America ^g	6.070	3.887	not availble	-36.0	
Guest countries					
Netherlands	0.498	0.425	not availble	-14.7	
United Arab Emirates	0.749	0.574	not availble	-23.4	-23.3

Notes: a) Jobs in branches of activity linked to tourism.

b) Total employment: 2.1 million in 2019; 1.6 million in 2020; and 1.7 million in 2021 (-20% compared to 2019).

c) Hospitality lost 237,000 employees between February 2020 and February 2021.

d) 6.8% of the workforce.

e) Estimate as per 3rd Tourism Satellite Account (direct and indirect).

f) 17.7% of total employment in Q3 2019 and 17.1% in Q3 2020.

g) Full and part time jobs.

Source: G20 and Guest Countries Survey. Not revised by UNWTO.

Table A1.4: Impact on tourism industries

Country	Number of tourism establishments (× 1,000)			Change (%)	
	2019	2020	2021	2020/2019	2021/2020
G20 economies					
Argentina ^a	15.9	15.8	not availble	-0.6	
Brazil	250.5	260.8	not availble	4.1	
Canada ^b	109.4	108.2	103.7 (mid year)	-1.1	
European Union	2,400	not availble	not availble		
France ^c	29.9	29.3	not availble	-2.0	
Germany ^d	51.2	48.9	48.4	-4.5	-0.5
Indonesia ^e	643.6	630.0	643.6	-13.6	
Italy	500.0	not availble	not availble		
Mexico	113.1	113.0	not availble	-0.1	
Spain	292.4	283.1	not availble	-9.3	
Türkiye	12.4	12.8	13.5	+0.4	+5
United Kingdom	208.9	not availble	not availble		
Guest countries					
Netherlands	64.6	68.2	not availble	+3.6	
United Arab Emirates ^f	1.1	1.0	not availble	-0.1	-6

Notes: a) Hotels and parahotels.

b) This excludes tourism establishments with 0 employees (+ 128,700 for 2019; + 138,300 in 2020; and + 144,400 in June 2021).

c) Accommodation only. 200,000 restaurants plus in 2019.

d) Includes accommodation establishments with 10 or more bed places and tourist camp sites with 10 or more camping pitches.

e) Except food and beverages serving industries

f) Hotel establishments only.

Source: G20 and Guest Countries Survey. Not revised by UNWTO.

Table A1.5: Impact on GDP

Country	Indicator	2019	2020	2021
G20 economies				
Argentina	AR Pesos	413.482	not availble	not availble
Brazil	Share (%)	7.7	not availble	not availble
China	Share (%)	11.05	4.01	not availble
European Union	(EUR billion)	1,297	not availble	not availble
France	Share (%)	8	not availble	not availble
Germany	Share (%)	3.9	not availble	not availble
India	Share (%)	5.01	5.16	not availble
Indonesia	Share (%)	4.97	4.05	4.2
Italy	Share (%)	13%	not availble	not availble
Japan	(JPY million)	11.145	not availble	not availble
Mexico	(MXN million)	1,956,848	1,475,107 ^a	not availble
Saudi Arabia	(USD billion)	32.64	12.61	not availble
Spain	Share (%)	12.4	5.5	not availble
South Africa	Share (%)	3.7	not availble	not availble
Türkiye	Share (%)	4.6	1.7	not availble
United Kingdom	(GBP billion)	48	not availble	not availble
United States of America	(USD million)	624,741	356,813	not availble
Guest countries				
Netherlands	Share (%)	4.4	2.4	not availble
Singapore		4	not availble	not availble
United Arab Emirates	(USD billion)	22.6	8.7	not availble

Note: a) See for details: <https://www.inegi.org.mx/temas/turismosat/> [14-09-2022].

Source: G20 and Guest Countries Survey. Not revised by UNWTO.

Table A1.6: Share of SMEs in tourism (%)

Coutry	2019	2020	2021
Canada ^a	99.8	99.8	99.9
European Union	99.9		
France	80		
Spain	99.9	99.9	

Note: a) 8.3% of all SMEs in the country are in tourism (8% in 2021).

Source: G20 and Guest Countries Survey. Not revised by UNWTO.

A1.2

REVIEW OF G20 POLICY RESPONSES TO MITIGATE THE IMPACT OF COVID-19 IN TOURISM, SPECIFICALLY ON MSMEs AND COMMUNITIES



Table A1.7: Policy responses of G20 countries on the impact of COVID-19 in tourism, specifically on MSMEs and communities (n = 19)

	Yes	No
2.1: Policy response to mitigate the impact of COVID-19 in the tourism sector. Has your country developed specific mechanisms to support the tourism sector?	19	0
2.2: Specific support measures for MSMEs. Has your country developed specific mechanisms to support tourism MSMEs?	17	2
2.3: Specific support measures for local communities affected by tourism COVID-19 crisis. Has your country developed specific mechanisms to support local communities?	15	4
2.4: Assessment of policies. Did your country assess the impact of the measures implemented to support tourism, particularly those aimed at MSMEs and communities?	7	12

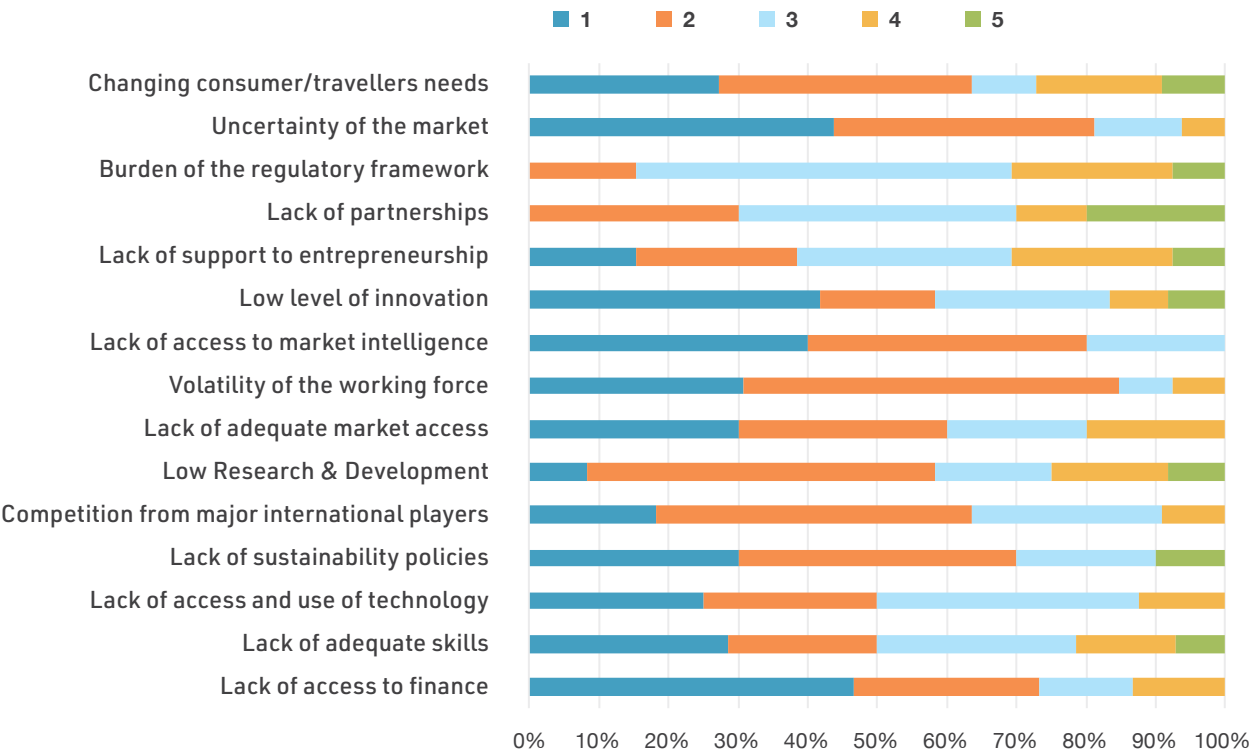


A1.3

MAPPING CHALLENGES, OPPORTUNITIES, AND PRIORITIES OF THE G20 ECONOMIES FOR TOURISM RECOVERY AND RESILIENCE – CHALLENGES AND OPPORTUNITIES FOR MSMEs AND COMMUNITIES

Figure A1.1: What are the main challenges moving forward for tourism recovery and resilience with a focus on MSMEs?

MAIN CHALLENGES FOR MSMEs

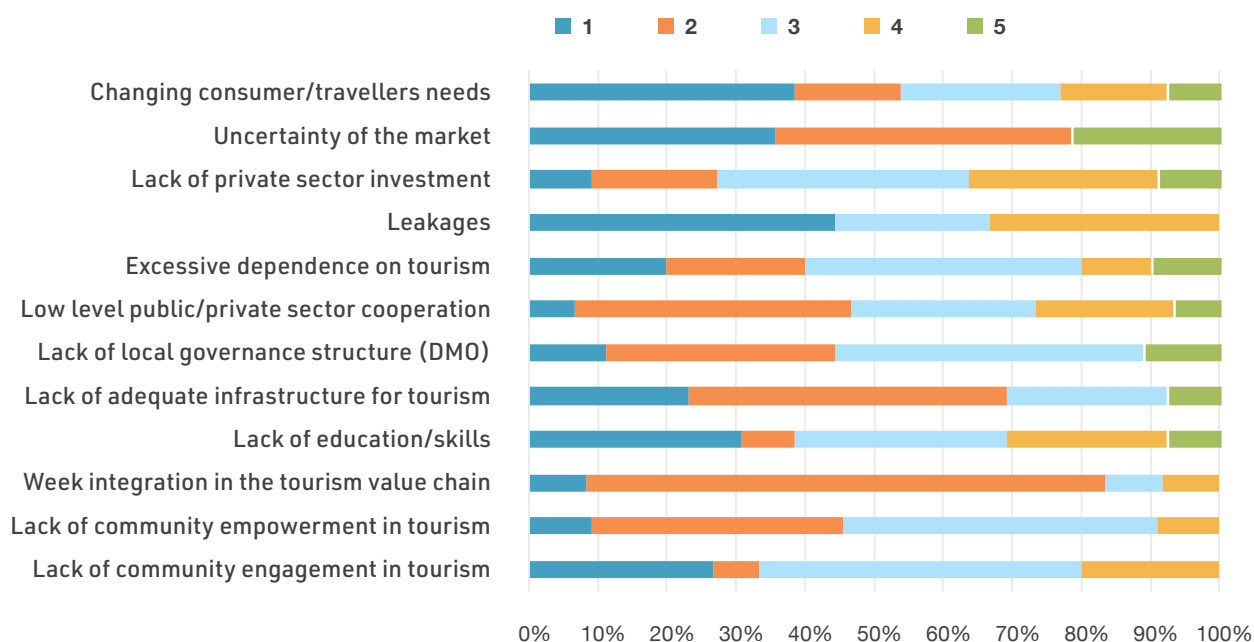


Notes: Multiple answers were possible.
Relevance of challenges from 1 to 5, being 1 'more relevant' and 5 'less relevant'.



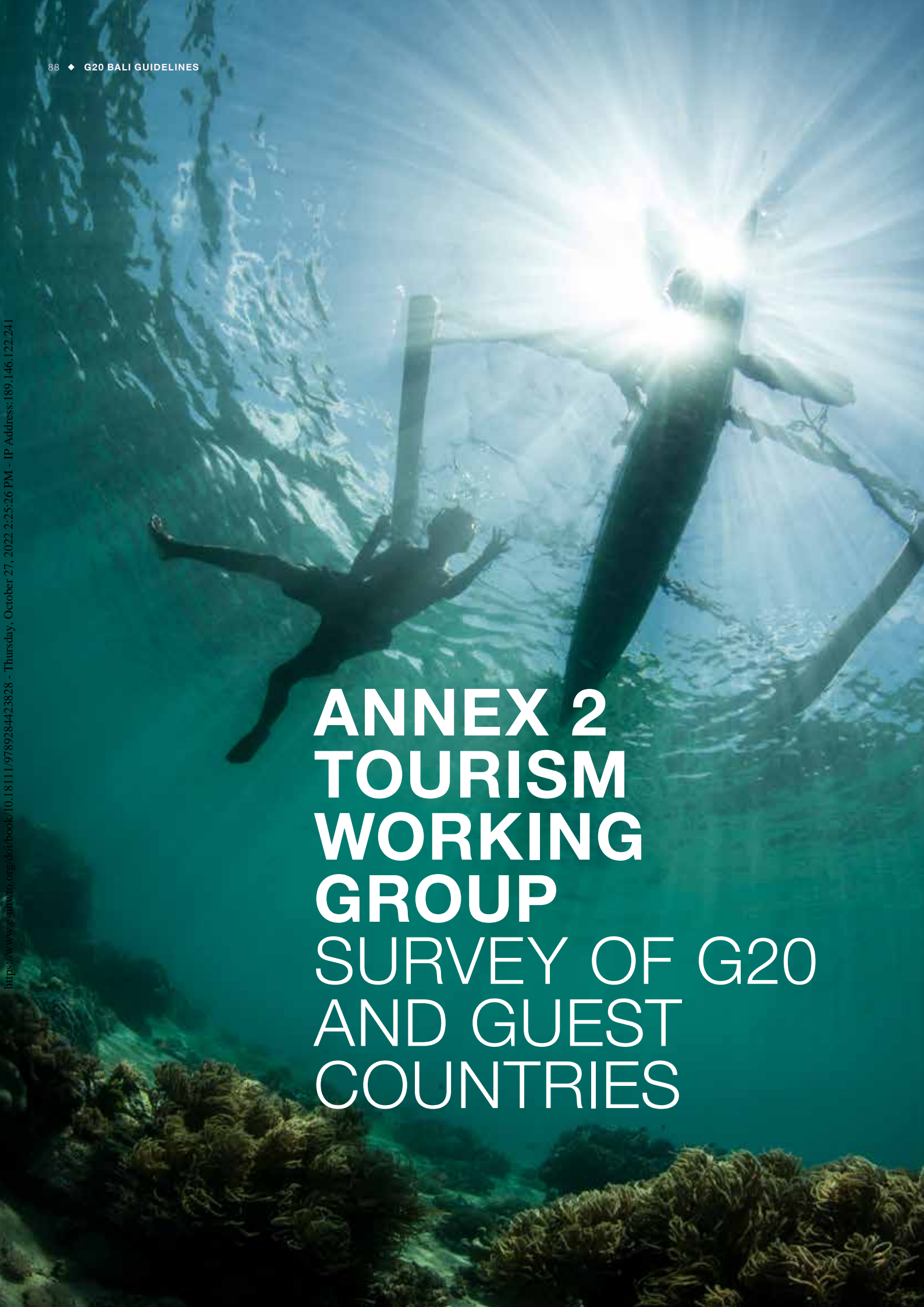
Figure A1.2: What are the main challenges moving forward for tourism recovery and resilience with a focus on communities?

MAIN CHALLENGES FOR COMMUNITIES



Notes: Multiple answers were possible.

Relevance of challenges from 1 to 5, being 1 'more relevant' and 5 'less relevant'.

An underwater photograph showing a diver in silhouette swimming towards the left. A large shark is swimming towards the right, its body partially illuminated by bright sunlight filtering through the water from the top right. The water is clear and blue, with a coral reef visible at the bottom.

ANNEX 2 TOURISM WORKING GROUP SURVEY OF G20 AND GUEST COUNTRIES

GUIDELINES FOR STRENGTHENING COMMUNITIES AND MSME AS TOURISM TRANSFORMATION AGENTS: A PEOPLE-CENTERED RECOVERY

G20 2022 Tourism Working Group – Survey of G20 and Guest Countries

UNWTO has been tasked to support the Indonesian Presidency in the development of the 'Guidelines for Strengthening Communities and MSME as Tourism Transformation Agents: A People-Centered Recovery', as per the Issue Note attached.

Bearing in mind 'The Rome Guidelines for the Future of Tourism', the document aims to gather countries' experiences to seize the opportunity to leverage the acceleration of digitalization, the growth of the knowledge-based economy, and consumers' greater appetite for sustainable experiences to advance lower density, more diversified, and higher value tourism development.

The Guidelines endeavour to translate these opportunities into inclusion and resilience in communities and Micro, Small, and Medium Enterprises (MSMEs) and build them as agents of transformation towards a more inclusive, sustainable, resilient, and digital tourism sector with a focus on the following five lines of action:

1. Human Capital: Jobs, Skills, Entrepreneurship and Education.
2. Innovation, Digitalization, and the Creative Economy.
3. Women and Youth Empowerment.
4. Climate Action, Biodiversity Conservation, and Circular Economy.
5. Policy, Governance, and Investment Frameworks..

The development of the Guidelines will be informed by the following:

1. Analysis of the current situation of the tourism sector globally and in the G20 economies;
2. Review of G20 policy responses to mitigate the impact of COVID-19 in the tourism sector specifically in terms of communities and MSMEs;
3. Mapping of challenges and priorities of the G20 economies for Recovery and Resilience in this area;
4. Identification of good practices on how MSMEs and communities have adapted during the pandemic and beyond;

Responses from this survey as well as other research will help inform the focus of the Guidelines while ensuring an effective engagement and sharing of experiences among the G20 while identifying priorities and areas of action across the G20.

The Presidency wishes to thank you in advance for your kind collaboration in submitting the response to the below survey by 11th January 2021 the latest to tourism@g20-indonesia.id and scarvao@unwto.org.

Ministry of Tourism and Creative Economy of
The Republic of Indonesia
tourism@g20-indonesia.id

Country Information

Country:

Organization:

Contact details for further information:

1. SITUATION OF THE TOURISM SECTOR GLOBALLY AND IN THE G20 ECONOMIES

1.1. IMPACT OF COVID-19 ON THE TOURISM SECTOR

Please share key data and insights on the impact of COVID-19 on the tourism sector of your country.

	Indicator	2019	2020	2021 (Change in %; indicate period; e.g. January–July)	Comments
International tourism	International tourist arrivals				
	International tourism receipts				
Domestic tourism	Overnight stays				Indicate if another indicator is used
Employment	Full-time jobs				Indicate if another indicator is used
Economic Impact	Direct tourism GDP				
	Tourism industries – number of tourism establishments				
	Share of MSMEs in tourism				
Other relevant indicators:					

1.2 OVERALL ASSESSMENT

Besides the data included above please share an overall assessment of the impact of COVID-19 on the tourism sector in your country, identifying major past, ongoing, and future challenges connected with the impact of the pandemic and its recovery, focussing in particular on MSMEs and communities:

2. REVIEW OF G20 POLICY RESPONSES TO MITIGATE THE IMPACT OF COVID-19 IN TOURISM AND SPECIFICALLY IN TERMS OF COMMUNITIES AND MSMES

2.1 POLICY RESPONSE TO MITIGATE THE IMPACT OF COVID-19 IN THE TOURISM SECTOR

Has your country developed specific mechanisms to support the tourism sector?

☐ Yes ☐ No

If yes, please describe them below

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	

If not, please identify how/which global measures benefited the tourism sector

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	



2.2 SPECIFIC SUPPORT MEASURES FOR MSMEs

Has your country developed specific mechanisms to support tourism MSMEs?

☐ Yes ☐ No

If yes, please describe them:

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	

If not, please identify how/which global measures benefited tourism MSMEs

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	



2.3 SPECIFIC SUPPORT MEASURES FOR LOCAL COMMUNITIES
AFFECTED BY TOURISM COVID-19 CRISIS

Has your country developed specific mechanisms to support local communities?

☐ Yes ☐ No

If yes, please describe them:

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	

If not, please identify how/which global measures benefited local communities

Area of intervention	Please describe
Fiscal policies	
Monetary policy	
Employment-related measures	
Social measures	
Other:	



2.4 ASSESSMENT OF POLICES

Did your country assess the impact of the measures implemented to support tourism, particularly those aimed at MSMEs and communities?

☐ Yes ☐ No

If yes, please describe them:

Area of intervention	Please describe	Reach	Impact-assessment
Fiscal policies			
Monetary policy			
Employment-related measures			
Social measures			
Other:			

3. MAPPING CHALLENGES, OPPORTUNITIES, AND PRIORITIES OF THE G20 ECONOMIES FOR TOURISM RECOVERY AND RESILIENCE

3.1 CHALLENGES AND OPPORTUNITIES FOR MSMEs AND COMMUNITIES

What are the main challenges moving forward for tourism recovery and resilience with a focus on MSMEs?

Challenges – Please rank top 5
1 = more relevant | 5 = less relevant

Challenges	Rank
Lack of access to finance	
Lack of adequate skills	
Lack of access and use of technology	
Lack of sustainability policies	
Competition from major international players	
Low Research & Development	
Lack of adequate market access	
Volatility of the working force	
Lack of access to market intelligence	
Low level of innovation	
Lack of support to entrepreneurship	
Lack of partnerships	
Burden of the regulatory framework	
Uncertainty of the market	
Changing consumer/travelers needs	
Other (please specify):	

What are the main challenges moving forward for tourism recovery and resilience with a focus on communities?

Challenges – Please rank top 5

1 = more relevant | 5 = less relevant

Challenges	Rank
Lack of community engagement in tourism	
Lack of community empowerment in tourism	
Weak integration in the tourism value chain	
Lack of education/skills	
Lack of adequate infrastructure for tourism development (including technological)	
Lack of local governance structure (destination management organizations)	
Low level of public/private sector cooperation	
Excessive dependence on tourism	
Leakages	
Lack of private sector investment	
Uncertainty of the market	
Changing consumer/travelers needs	
Other (please specify):	

Please share possible opportunities for tourism recovery and resilience with a focus on MSMEs in your country:

Please share possible opportunities for tourism recovery and resilience with a focus on communities in your country:

3.2 G20 PRIORITIES FOR RECOVERY AND RESILIENCE

Please identify your country's overall priorities for Recovery and Resilience in the tourism

Priority	Description
1.	
2.	
3.	
4.	
5.	

Please identify your country's priorities for Recovery and Resilience in relation to MSMEs in tourism

Priority	Description
1.	
2.	
3.	
4.	
5.	

Please identify your country's priorities for Recovery and Resilience in relation to communities in tourism

Priority	Description
1.	
2.	
3.	
4.	
5.	

4. MSMEs AND COMMUNITIES AS AGENTS OF TRANSFORMATION IN TOURISM

Please indicate the three key factors you consider critical to make MSMEs agents of transformation for tourism and describe how they should be addressed

Factor	Description
1.	
2.	
3.	

Please indicate which three key factors do you consider critical to make communities agents of transformation for tourism and describe how they should be addressed

Factor	Description
1.	
2.	
3.	



5. IDENTIFICATION OF GOOD PRACTICES ON HOW MSMEs AND COMMUNITIES HAVE ADAPTED DURING THE PANDEMIC AND BEYOND

Please note that we hope to use these case studies as examples throughout the report and will consult with you on their final format/text.

Please share relevant case studies related to how MSMEs and communities in your country have adjusted during/post the pandemic. This can include specific national or local policies as well as measures taken by associations/private sector

CASE STUDY 1 – MSMEs

Name:

Description:

Relevant features/outcomes:

Relevant weblinks and support materials:

Other relevant information:

CASE STUDY 2 – COMMUNITIES

Please share any case studies of existing national programmes or initiatives aimed at promoting inclusive community development through tourism and include as many cases as available using the template below for each. Please note that we hope to use these case studies as examples throughout the report and will consult with you on their final format/text.

Name:

Description:

Relevant features/outcomes:

Relevant weblinks and support materials:

Other relevant information:

Thank you very much for your collaboration.



LIST OF ACRONYMS AND ABBREVIATIONS

ADB	Asian Development Bank	NTA	national tourism administration
ASEAN	Association of Southeast Asian Nations	NGO	non-governmental organization
CAD	Canadian dollar	PGC	paid generated content
CBT	community-based tourism	PPCP	public-private-community-partnership
CCS	cultural and creative sectors	R&D	research and development
CCI	cultural and creative industries	ROI	return on investment
CCIS	cultural and creative industries and sectors	OECD	Organisation for Economic Co-operation and Development
CO ₂	carbon-dioxide	OSH	occupational safety and health
DEI	diversity, equity and inclusion	SMEs	small and medium-sized enterprises
DMO	destination marketing/management organization	SDG	Sustainable Development Goal
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit	TDGDP	tourism direct gross domestic product
ECV	electric combustion vehicle	SIDS	small islands developing states
EGD	European Green Deal	SOE	state-owned enterprise
EUR	euro	TSA	Tourism Satellite Account
FDI	foreign direct investment	TVET	technical and vocational education and training
FIT	fully individual travel	UK	United Kingdom
GBP	United Kingdom pound	UN	United Nations
GEF	global environment facility	UNCTAD	United Nations Conference on Trade and Development
GHG	greenhouse gas	UNDP	United Nations Development Programme
GDP	gross domestic product	UNEP	United Nations Environment Programme
GTPI	Global Tourism Plastics Initiative	UNESCO	United Nations Educational, Social and Cultural Organization
IAS	Invasive Alien Species	UNFCCC	United Nations Framework Convention for Climate Change
ICE	internal combustion engine	UAE	United Arab Emirates
ICT	information and communication technologies	UN-Women	United Nations Entity for Gender Equality and the Empowerment of Women
IDB	Islamic Development Bank	UNWTO	World Tourism Organization
IDR	Indonesian rupiah	UGC	user generated content
ILO	International Labour Organization	USD	United States dollar
IFC	International Finance Corporation	VPD	vaccine-preventable diseases
IMF	International Monetary Fund	VC	venture capital
IoT	Internet of things	WB	World Bank
IP	intellectual property	WEF	World Economic Forum
IRTS	International Recommendations for Tourism Statistics	WHO	World Health Organization
IT	information technologies	WIPO	World Intellectual Property Organization
JICA	Japan International Cooperation Agency	WTO	World Trade Organization
LDCs	least developed countries	WWF	World Wildlife Fund
KPIs	key performance indicators	WTTC	World Travel & Tourism Council
MSMEs	micro-, small and medium-sized enterprises		
NEPAD	African Union Development Agency – NEPAD (AUDA-NEPAD)		

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