



Survey Findings on Members' Priorities for UN Tourism 2026-2027 Programme of Work (PoW)

Interpretive Overview and Key Observations

70th Meeting of the UN Tourism Commission for the Americas

Lima, Peru, 1 August 2025

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1. Introduction

This paper presents a focused analysis of one specific component of the survey findings—namely, the current challenges faced by countries in the Americas and their policy priorities for the coming years to ensure sustainable and competitive growth in the tourism sector. The survey, conducted between December 2024 and March 2025, aimed to identify the needs and priorities of Member States in order to inform the preparation of the UN Tourism Programme of Work for the 2026–2027 biennium. Given the scope and complexity of the survey, this paper may be of interest to a broad audience and offers valuable insights for policymakers, industry stakeholders, academics, and the wider professional community. It highlights the rationale and significance of the findings, while providing an interpretive overview and key observations on emerging policy patterns. Notably, the points arising from the qualitative research¹ reflect the region as a whole, while also capturing the specificities and perspectives of North America, the Caribbean, Central America, and South America. The paper consists of three sections and two annexes.

¹ Roman-Acosta, D., 'Qualitative research: Defining features and guiding principles', *Forum for Education Studies*, 2.2 (2024), 1262 <https://doi.org/10.56294/mw2024655>

2. Research method and characteristics

The survey was conducted with full rigor and transparency guiding every step of the process². Its findings were discussed with the UN Tourism Programme and Budget Committee and served as a key foundation in shaping the draft Programme of Work for the next biennium. This paper presents a synthesis of the qualitative results gathered through the survey and their implications for regional policy planning in the Americas.

Robust and reliable qualitative data were collected through a carefully designed mix of closed and open-ended questions³, applying an inductive approach to capture diverse insights⁴. A unified voice emerged among public and private sector stakeholders, including national tourism administrations, other government entities, regional and local destination management organizations (DMOs), and leading industry associations and organizations.

3. Challenges and policy priorities

Tourism destinations across the Americas are navigating a changing environment shaped by structural gaps, shifting traveller expectations, and a growing need for long-term competitiveness. Countries in the region have identified clear priorities, with sustainability and climate resilience emerging as the leading concern, followed by workforce development, infrastructure, product diversification, and investment.

3.1. Sustainability and climate resilience as a top priority

Sustainability and climate resilience are now at the centre of tourism strategies in the Americas. This reflects a broader shift in thinking—from treating sustainability as an optional goal to making it a core part of policy, planning, and promotion. Destinations are focusing on protecting natural and cultural resources, promoting low-impact development, and building resilience to climate-related risks. Actions include better environmental management, encouraging soft mobility, and integrating nature-based tourism into national strategies. Sustainability is also being seen as a response to

² Köhler, A. K. M. A. H. and Banks, R.L. 'Assessing Transparency and Methodological Precision in Variable Measurement within Organizational Research: Implications for Validity', *Quality & Quantity*, 58, no. 10 (2024), 4347–4369, <https://doi.org/10.1007/s11135-024-01991-x>

³ Bazeley, P. and Jackson, K. 'Qualitative Data Analysis with NVivo', *Journal of Mixed Methods Research*, 14, no. 2 (2020), 234–237, <https://doi.org/10.1177/1558689820902765>.

⁴ Charmaz, K. 'Constructing Grounded Theory: A Practical Guide Through Qualitative Analysis', *Sociology Compass*, 13.8 (2019), e12744, <https://doi.org/10.1111/soc4.12744>.

changing visitor preferences, with more travellers seeking responsible and meaningful experiences. However, limited funding, weak coordination, and lack of reliable data remain obstacles. To make sustainability a practical reality, stronger governance, technical support, and innovative financing mechanisms will be essential.

3.2. Workforce development and skills

Human capital is the second most important priority across the region. Many destinations are facing shortages in skilled staff, particularly in the hospitality sector. There is a growing need to align education and training with industry needs. Countries are focusing on improving vocational training, attracting young talent, and helping workers adapt to new digital and sustainability trends. Better working conditions and clearer career paths will also be important to make industry jobs more attractive and stable. Addressing the skills gap is key not only for improving service quality but also for supporting innovation and long-term resilience.

3.3. Infrastructure as a foundation for growth

Tourism infrastructure is another priority area, especially in relation to accessibility, safety, and sustainability. Many destinations in the Americas still face gaps in transport, accommodation capacity, and visitor facilities, particularly in rural areas. Investments are expected to target roads, airports, ports, and digital infrastructure. Improved infrastructure will help unlock underdeveloped areas, support regional integration, and respond to rising visitor expectations.

3.4. Diversifying tourism products

Countries across the Americas are looking to diversify their tourism offerings in order to strengthen competitiveness, reduce seasonality, and respond to changing demand. In addition to traditional beach and urban tourism, there is a growing interest in cultural, rural, adventure, and ecological products. Expanding and improving travel experiences can attract new market segments and help distribute visitor flows more evenly. Product diversification will also support local communities by creating new income opportunities and promoting cultural heritage.

3.5. Encouraging investment and private sector participation

Attracting investment remains a shared priority. Many destinations are working to create a more transparent and flexible environment for investors. This includes modifying legal and regulatory frameworks, introducing targeted incentives, and improving coordination among institutions.

Access to finance, especially for small and medium enterprises (SMEs), remains limited in some countries. Public–Private Partnerships (PPPs) are seen as key to mobilizing resources, upgrading facilities, and supporting innovation ecosystems.

3.6. Improving promotion and branding

Many destinations from the Americas are looking to strengthen their brand and improve marketing to better position themselves in a competitive global environment. The focus is shifting toward digital promotion, storytelling, and targeting high-value travellers who seek quality and sustainability. Stronger brand positioning will also support efforts to enter new markets and promote more balanced visitor flows.

3.7. Priority synergies and long-term perspectives

Many of the priorities of countries for the coming years are closely connected. For example, sustainability is linked to infrastructure planning, product development, workforce training, and destination branding. Likewise, developing human capital and improving governance will help make all other goals more achievable. Addressing these issues in an integrated way will help destinations from the Americas build a more resilient and inclusive tourism sector—one that can adapt to change while delivering long-term benefits to communities and visitors alike.

Annex I. Top 10 Challenges in the Americas

1. **Understanding mobility patterns and improving connectivity** (air, road, etc.)
2. **Education and skills development**
3. **Inadequate and uneven tourism infrastructure across the region**
4. **Economic environment** (i.e., oil prices, inflation, interest and exchange rates)
5. **Staff shortages** / problem for attracting and retaining talents
6. **Lack of investments** / Weak intergovernmental coordination / Lack of data and analytics for informed investment decision-making
7. **Limited diversity or quality of tourism products**
8. **Digital gap** / Challenges in adapting to digital transformation for tourism businesses
9. **Increasing competition among destinations / Challenges of positioning, pricing and/or product diversification**
10. **Lack of funding and limited access to finance** / Currency volatility

Annex II. Top 10 Policy Priorities for Destinations in the Americas⁵

Priorities	% Replies
Protecting and managing natural resources (water, biodiversity). Promoting greener practices (circularity, soft mobility). Mitigating and adapting to climate change . Preventing and recovering from extreme events	65%
Fostering innovation and digitalization throughout the industry, including AI	53%
Promoting sustainable development of tourism . Tourism with higher value and lower impact	47%
Developing and diversifying tourism products (better offer and competitiveness)	41%
Promoting the inclusion of local and rural communities through improved access to tourism markets, education, and decision-making process, while ensuring quality of life in tourism destinations	41%
Developing tourism infrastructure and superstructure (transport and accommodations) and tourism sites (accessibility)	35%
Human Capital development: Training public and private sector workforce, capacity-building, developing skills, etc.	29%
Reviewing, improving and enforcing tourism legal and regulatory frameworks: legislation, norms, standards, codes, taxation schemes, hotel classification systems, etc.	29%
Strengthening tourism institutional capacity and governance . Defining and implementing policies and strategies	29%
Fostering the promotion, branding, and strategic positioning of destination , including through the use of emerging digital channels	24%

⁵ Due to multiple-choice responses and the possibility for respondents to indicate several priorities, the total percentage exceeds 100%