



UNWTO NETWORK OF SUSTAINABLE TOURISM OBSERVATORIES (INSTO)

## 2020 Global INSTO Virtual Meeting

UNWTO Headquarters, Madrid, Spain, 21 October 2020

### Main Takeaways

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The 2020 Global virtual meeting of the International Network of Sustainable Tourism Observatories (INSTO) provided a platform for an open dialogue among observatories and international experts. Pressing issues resulting from COVID-19 were discussed, as well as the support needed by destinations to maintain their efforts to place sustainability at the heart of tourism development.

On the occasion of the meeting, the Canary Islands were welcomed as new INSTO member. Observatories from Australia, Argentina, Canada, Italy, Mexico and Portugal shared their experiences and progress addressing the challenges of the COVID-19 pandemic, reflecting the continuously evolving commitment of INSTO destinations towards sustainable tourism development.

The following are the main takeaways of the meeting:

- Strong coordination and information sharing remain essential for the restart of tourism, especially to be able to cope with the challenges posed by the pandemic in terms of timely data collection, to increase investment in systems and processes that support safe travel and responsible businesses operations.
- The regular and timely generation of evidence by the observatories plays an increasingly important support role for destination management organizations to be able to take informed decisions, in connection to their need to adapt to the continuously evolving challenges of the pandemic.

- Destination management organizations and subsequently observatories have had to diversify their support beyond their traditional activities during the crisis, placing the focus on resilience and sustainability through activities such as: i) monitoring of business recovery along the entire value chain, ranging from monitoring travel flows and change in behaviour in spending of visitors; ii) sustainability considerations in long-term strategies, as well as actions related to current challenges, such as elaboration, implementation and monitoring of safety and security and health and hygiene protocols; iii) measuring the effectiveness of investment policies and investments at destination level, such as monitoring the level of financial aid for the tourism sector, as well as providing advisory services to the destination's enterprises; and iv) supporting of the workforce in terms of sustaining jobs and providing trainings in different tourism-related areas.
- Observatories have increased their efforts to provide support to local stakeholders during the crisis, implementing a variety of activities to support the recovery of tourism, such as preparing recovery plans, facilitating webinars and trainings in connection with health and safety protocols, assisting businesses in distress to access financial support and mental health support, for both employers and employees, and the creation of new partnerships, among others.
- Destinations are leading the transformation in the frontline of response and recovery efforts as they are the closest to their citizens and their needs. COVID-19 initiatives and policies must boost the capacity of local actors to quickly respond to and recover from the crisis. This should go hand in hand with efforts to mitigate social and economic impacts, to support destinations in the recovery phase.
- A number of research exercises on "local satisfaction with tourism" were conducted among the observatories since the beginning of the crisis, pointing at the importance of this issue area to better understand residents' sentiments towards tourism, how the pandemic affects residents' perception of tourism and identifying the status quo and opportunities to rebuild/reinforce the social license for tourism.

- Experiences were shared related to methodologies, questionnaires, creative ways of engaging and approaching participants, focus groups and conducting surveys during the pandemic.
- Results of visitor surveys in accommodation businesses undertaken show that while hygiene has become more important to guests, confidence of travelers remains high. Visitor behavior has changed, especially with regards to social distancing from other guests and use of own transportation. An increase in demand for outdoor activities like hiking and biking has also been registered, with the consequent better performance for nature-based destinations than urban locations.
- Analysis of adaptation and mitigation strategies, such as the adjustment of cancellation policies, increased outdoor activities, focus on repeating visitors and intensified marketing efforts, demonstrated significant differences across market segments and the increasing importance of perceived quality and reliability of the products on offer. In addition, it was noticed that the focus on regular guests as well as direct relation between host and guest are important factors, in particular in five-star accommodations, in mitigation strategies.
- The measurement and analysis of “public health” in destinations is a new issue area of importance, crucial to support response strategies by tourism authorities. It is closely interconnected with the environmental health of destinations, stressing the need for a holistic view on sustainability.
- Governance is a substantial cross-cutting issue, and an essential component of a rigorous management, which is in line with health needs and an contributes to the effectiveness of the COVID-19 response. Increased coordination and cooperation on policy action will be needed for strengthening the preparedness of health systems to respond to future waves of the pandemic and/while boosting the entire tourism sector to recover from the crisis.
- The role of governance in the context of response and recovery have had special attention and outlined the relevance of destinations in leading the

process in the elaboration and monitoring of recovery measures by close coordination with all stakeholders on local, regional and national level.