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## **Report of the Secretary-General**

### **UNWTO's Vision, Priorities and Programme of Work for 2022-2023**

#### **I. Strategic Objectives and Priorities**

##### **Objective 1: Strong Coordination, Effective Policy Guidance, and New Partnerships**

- Advocacy and coordination
- New models, standards and recommendations
- Partnerships

##### **Objective 2: Diversification of Services to Members and Expansion of Membership**

- New online services to Members
- Increase resource mobilization for technical assistance projects and influence public investment facilitation
- Develop new models and harmonize regulatory frameworks
- Develop national tourism intelligence systems
- Attract new members

##### **Objective 3: Management and Modernization of the Organization**

- Prepare a UNWTO Strategic Plan
- Measuring performance and external outcomes
- Strengthening compliance, ethics and internal oversight functions
- Achieving a zero-paper organization
- Improving internal coordination
- Implement a Content Management System (CMS)

##### **Priority 1: Make tourism smarter: innovation and digital transformation**

##### **Priority 2: Green investments and entrepreneurship**

##### **Priority 3: Education and jobs**

##### **Priority 4: Build resilience, foster market intelligence and facilitate travel**

##### **Priority 5: Protect our heritage: social, cultural and environmental sustainability**

## II. Overview of International Trends and Outlook

- Global tourism experienced a slight 4% upturn in 2021, with 15 million more international tourist arrivals as compared to 2020 but levels remained 72% below the pre-pandemic year 2019 according to the January 2022 issue of the [UNWTO World Tourism Barometer](#).
- Rising vaccination rates combined with the easing of travel restrictions have all helped release pent-up demand in 2021 which is clear in the 79% increase registered in international tourist arrivals in the period March-December 2021 vs. the same period of 2020.
- Europe and the Americas recorded the strongest results by region in the full year 2021 relative to 2020 with arrivals up 19% and 17% respectively, though they still remained 62% and 63% below 2019 levels. Africa saw a 12% increase in 2021 compared to 2020, though it remained 74% below 2019 levels. In Asia and the Pacific, arrivals dropped 65% from 2020 levels and 94% when compared to pre-pandemic values.
- By subregion, the Caribbean saw the best performance in 2021, with international arrivals up 63% over 2020, though 37% below 2019, with some destinations coming close to, or even exceeding pre-pandemic levels.
- Among the world's top 15 source markets in terms of spending, the best performances came from Belgium (+28% as compared to 2019), France (-37%), India (-44%), Switzerland (-48%) and Republic of Korea (-49%).
- The economic contribution of tourism (tourism direct gross domestic product) is estimated at US\$ 1.9 trillion in 2021, above the US\$ 1.6 trillion in 2020, but still well below the pre-pandemic value of US\$ 3.5 trillion. This would mean that the pandemic has led to an accumulated loss of US\$ 3.5 trillion in direct tourism GDP in 2020-2021.
- Looking forward, the latest UNWTO Panel of Experts survey indicates that 61% of tourism professionals expect a better performance in 2022. However, most experts (64%) also believe international tourism will not return to 2019 levels until 2024 or later.
- UNWTO scenarios point to 30% to 78% growth in international tourist arrivals in 2022 depending on various factors. This would be 50% to 63% below pre-pandemic levels. The initial months of 2022 have seen a significant improvement in terms of COVID-19 related travel restrictions in a growing number of countries.
- While international tourism bounces back, domestic tourism will continue to drive the recovery of the sector in an increasing number of destinations. Domestic travel is fuelled by demand for destinations which are closer to home and have low population density, as tourists look for open-air activities, nature-based products and rural tourism.
- In the Middle East, arrivals declined 24% in 2021 compared to 2020 and were 79% below 2019, though with a clear improvement from September onwards.
- Indicators from the [UNWTO Tourism Recovery Tracker](#) confirm this trend with a clear increase in seat capacity in international routes from November 2021 onwards and confirmed in January 2022; the Region had the best performance in terms of hotel occupancy rates among world regions both in 2021 and January 2022, and a strong rebound in hotel bookings.
- Nonetheless, the military offensive against Ukraine initiated on 24 February 2022 adds a significant downside risk to recovery. The Secretariat is closely monitoring the conflict in Ukraine and assessing its impact on travel and tourism.
- While it is too early to assess the consequences for tourism, the military offensive against Ukraine clearly adds a clear downside risk to national, regional and overall tourism recovery with spill-over effects to general economic recovery. This could delay a still weak and uneven tourism restart as an increasing number of destinations have been easing travel restrictions and opening up to

international travel. The military offensive is an additional burden especially for those economies reliant on tourism's much-needed economic and social benefits.

- The US and Asian source markets, which are now starting to open and tend to be more risk-averse, may be particularly affected in respect to travel in general and to Europe in particular.
- For the time being, the shutdown of Ukrainian and Russian airspace as well as the ban on flights from Russian carriers imposed by most European and other countries impacts travel and mobility beyond the region itself. Intra-European travel is set to be affected by the disruption in the Russian outbound market, but also destinations in other regions, especially tourism-dependent island destinations.
- The conflict could also add much pressure to an already challenging economic environment and weigh on travel demand in 2022. The recent spike in oil prices (the barrel of Brent oil surpassed US\$ 100 in the early days of March), as well as rising inflation resulting from overall higher energy prices, the potential rise in interest rates and its negative impact on purchasing power, as well as the disruption of supply chains, are of particular concern. This could translate into higher transport and accommodation prices, supply shortages, and threaten consumer demand and investment plans.
- The conflict will also have an impact on travellers' confidence, with a fear of being stranded or directly affected by the conflict, particularly in the most risk-averse source markets. UNWTO recalls the recently approved UNWTO International Code for the Protection of Tourists which provides a set of minimum international standards for the protection of tourists in emergency situations and the consumer rights of tourists.

### III. 2022 UNWTO's Key Initiatives and Activities

#### Advocacy & Outreach

- **United Nations General Assembly High Level Thematic Debate “Putting sustainable and resilient tourism at the heart of an inclusive recovery”**, organized with the World Tourism Organization (UNWTO) with the UNGA Presidency. The one-day event will be held on 4 May 2022, at the UN Headquarters in New York, in the UN General Assembly Hall. The thematic debate will be convened pursuant to General Assembly resolution 72/313 of 17 September 2018, entitled “Revitalisation of the work of the General Assembly”. It is the first time ever that a tourism event is to be conducted at the UNGA.
- **Global Tourism Crisis Committee (GTCC)**. In view of the pandemic as well as the ongoing political tensions in Europe, the UNWTO has been reinforcing a strong voice of the global travel and tourism community as an effective response to the pandemic and the Russia-Ukraine conflict. The forthcoming meeting of the GTCC will revise the mandate of the GTCC in order to strengthen its role and build more agile governance. UNWTO leads in monitoring impacts, fostering tourism governance for building resilience, building consumer confidence and the impact on tourism and travel of the current situation in Ukraine, while coordinating with WHO, ICAO and other international organizations, Member States and the leading private sector stakeholders of the world for defining ways forward, mitigating impacts and further unified measures.
- **Informal Conference of Tourism Ministers of the European Union**. Being organized under the French Presidency in Dijon, France on 18 of March 2022, the UNWTO Secretary-General addressed to Ministers of Tourism and other high-level delegates of all 27 EU countries on the recovery of the tourism sector in Europe, the climate emergency and war in Europe. The UNWTO's presence at this important gathering served as its strengthened positioning within the context of the European Institutions. The Secretary-General held bilateral meetings with some non-member States discussing and encouraging them to join or re-join the Organization. The meeting aimed at continuing discussion of the proposal produced by the European Commission to prepare a European Agenda for Tourism 2030/2050. <https://www.unwto.org/news/work-together-and-make-tourism-pillar-of-peace>

- **G20 Tourism.** Support to the Indonesia Presidency of the G20 as a Knowledge Partner by developing with the G20 Tourism Working Group a UNWTO report on “Guidelines for Strengthening Communities and MSME as Tourism Transformation Agents: A People-Centred Recovery”.
- **International Code for the Protection of Tourists (ICPT).** Adopted by [resolution 732\(XXIV\)](#) of the General Assembly at its 24th session held in Madrid, Spain, from 30 November to 3 December 2021, the [International Code for the Protection of Tourists](#) (ICPT) provides a comprehensive set of principles and recommendations for the protection of tourists in emergency situations and consumer rights of tourists aiming at harmonizing minimum international standards and providing sufficient guarantees to international tourists in the post COVID-19 scenario. Member States of both UNWTO and the United Nations are now encouraged to adhere fully or partially to the ICPT and to integrate its principles and recommendations into their relevant policies, legislation and regulations, as well as to report to the Secretary-General on the application of the ICPT within their country. Member States adhering to the ICPT will be invited to serve as ‘Champion Countries for the Code’ in order to galvanize political support and visibility for the ICPT among governments and promote adherence thereto by States within the region.

### **Market Intelligence**

UNWTO will step up its work in this area as a critical component to monitor crises impact and stimulate recovery. Its programme is based on two pillars: 1) provide updated and relevant information to Member States and the sector at large; and 2) support Member States in the development of Market Intelligence Systems. In this regard, key outputs for 2022 include:

- Upscale the Secretariat capacity to monitor the impact of ongoing crises on tourism such as the ongoing recovery of the Covid-19 pandemic and the offensive of the Russia Federation on Ukraine.
- Scale up coverage and use of big data in UNWTO monitoring tools (UNWTO World Tourism Barometer and Dashboards).
- Scale up the UNWTO/IATA Destination Tracker to become a global reference on travel requirements.
- Review and update Tourism Direct GDP global and regional estimates and development of estimates on tourism employment.
- Training and technical assistance to Members (UNWTO/ETC Data Lab, training, and technical assistance).
- Research on Changing Traveller Trends in the face of COVID-19.

### **Destination Management**

With the increased relevance of this area, UNWTO will work to create international standards in Destination Management Governance in collaboration with the International Standardization Organization (ISO) and continue to support Members. Outputs include:

- Review, update and boost the UNWTO.QUEST Programme.
- Launch the UNWTO League of Sustainable Tourism Cities (on the occasion of the UNWTO Mayors’ Forum for Sustainable Urban Tourism, Madrid, Spain, 20-21 October 2022).
- Smart Destinations Conference 2022 (Valencia, Spain, 23-25 November 2022).
- UNWTO/ISO cooperation on Tourism Destination Management Organizations (DMOs) for the development of guidelines/norms.

### **Product Development & Diversification**

Support Member States in innovating in product development with a special programme to advance tourism as a tool for rural development.

- UNWTO Best Tourism Villages Initiative (2022 edition, Upgrade Programme and Rural Tourism Network).
- Executive Training on Tourism and Rural Development, Gastronomy Tourism and Product Development.
- Guidelines and Best Practices on Tourism and Rural Development Platform.
- Measuring Mountain Tourism Report with the Food and Agriculture Organization (FAO).

- 7th UNWTO/BCC World Forum on Gastronomy Tourism (Nara, Japan, 12-15 December 2022, TBC).
- African Gastronomy Initiative.
- Measuring Wine Tourism Project with the International Organisation of Vine and Wine (OIV).
- 6th UNWTO Wine Tourism Conference (Alba, Italy, 20-21 September 2022).

### **Innovation**

Supporting the digitalization process of tourism Small and Medium Enterprises (SMEs): Partnering with the largest technology companies such as Amadeus, Mastercard, Cisco, Telefónica, amongst others, the UNWTO **Digital Futures for SMEs Programme** aims to provide digital training on connectivity, business growth, e-commerce, big data and analytics, payments and security to 1 million beneficiaries. At a first stage, it is planned to reach 20,000 SMEs from 22 countries, with at least 5,000 SMEs from the Middle East registered and with access to this programme.

In addition, there will be continuous support to startups. For this reason, a Tourism Tech Adventures forum was held on 24-25 March in the United Arab Emirates on “Connecting Minds, Creating the Future” on the sidelines of EXPO 2020.

### **Education**

With the objective of creating more added-value jobs in tourism through education, the **UNWTO Knowledge Lab** will be launched. Its main goals will be releasing the first UNWTO Tourism Professional Journey A to Z on how to build a professional path in the sector, UNWTO Guidelines on Technology, legal innovation recommendations, and assisting the creation of International and National Tourism Academies with the support of UNWTO. Furthermore, the first **Observatory on Quality of Tourism Education and Jobs** will be set up to monitor the advancement of the strategy.

Moreover, the implementation of the **Human Capital Development by E-learning** project with the Kingdom of Saudi Arabia will start in order to create 10 new online courses on tourism in the Arabic language.

### **Investments**

Green investments for green transitions. Closely working with the International Finance Corporation (IFC), the **Green Hotel Revitalization Programme** to reduce footprints in emerging markets will continue, in addition to pilot projects in specific countries. At least 30 hotels from Egypt will be trained on green investments and green finance mechanisms in collaboration with IFC.

Promotion of investments for a sustainable recovery through reports on greenfield investments, accelerating the adoption of technologies and enabling frameworks for tourism investment. Likewise, a set of **UNWTO Investment Guidelines** on specific destinations will be released throughout the year.

### **Youth and Talent Development**

- **Global Youth Tourism Summit (GYTS).** The UNWTO has developed the GYTS, a series of international events that will give children and youth a unique platform to share innovative ideas, shape their vision and put forward proposals for the future of sustainable tourism within the framework of the UN 2030 Agenda for Sustainable Development. The first edition of the GYTS will take place in Sorrento, Italy, from 27 June to 3 July 2022 jointly organized with the Government of the Italian Republic.
- **UNWTO Students' League.** After a successful global edition in 2021, with over 700 students from around the world participating, and with the aim to support each country's young people in their preparation and engagement to help shape a better world and to positively impact on each country's national tourism plan, in 2022, UNWTO will be launching National UNWTO Students' Leagues in the different Member States, which will culminate in a Global UNWTO Students' League Final.

## **Sustainability**

- Review of the integration of sustainable consumption and production into national tourism policies, in particular, sustainable food management and climate action, among other topics.
- Coordinating the High-Level Thematic Debate: The role of tourism in the inclusive, resilient and sustainable recovery hosted by the President of the United Nations General Assembly.
- Preparation for the UNGA report on the promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection, to be submitted to the 77th session of the UN General Assembly.
- Expand the International Network of Sustainable Tourism Observatories and consolidate the capacity of its destination members by sharing knowledge and expertise among its members as well as to the UNWTO Member States and Affiliate Members.
- Continue to develop technical guidance for measuring, monitoring and analysing sustainable tourism development at destination level as well as supporting local authorities in an effective and timely manner. Organizing technical virtual and in-person meetings such as the Sustainable Destinations Summit in Mallorca to advance the discussion and support members and interested stakeholders.
- Further to the launch of the Glasgow Declaration at the UN Climate COP26 in Glasgow, about the need to accelerate climate action in tourism and to secure strong actions and commitment, UNWTO is developing several tools and resources that will support signatories in the implementation of their commitments. For instance, guidance on climate action planning and a briefing paper on measurement of CO<sub>2</sub> emissions.
- Continue addressing the integration of circularity in the tourism value chain through the coordination of the Global Tourism Plastics Initiative, which will continue releasing supporting materials, such as a methodology for measuring plastics in tourism operations and guidance on procurement, and providing a platform for exchange, as well as through the Global Roadmap on Food Waste Reduction in tourism.
- Continue collaborating with other UN agencies, governments, and tourism stakeholders within the framework of the One Planet Sustainable Tourism Programme which is built on a participatory approach advance sustainable consumption and production (SCP) in order to address the major challenges of climate change, biodiversity loss and pollution.

## **Development of statistical frameworks: Measuring the Sustainability of Tourism (MST)**

Through the development of a Statistical Framework for [Measuring the Sustainability of Tourism](#) (MST), UNWTO aims provide to all countries in the world a common framework to measure the economic, social and environmental links of tourism, at national and sub-national levels.

MST has been endorsed by top-level policy frameworks and bodies such as the [AIU1a Framework for Inclusive Community Development Through Tourism](#) endorsed by the G20 Leaders' Declaration under the Saudi Presidency, the UNWTO [General Assembly](#) and [Executive Council](#), the [High Level Discussion on Measuring the Sustainability of Tourism](#) and others<sup>1</sup>.

The UN Statistical Commission, the highest decision-making body in global statistics, has supported MST since its inception and at its last session (Feb-Mar 2022), upon considering the background document [Measuring the Sustainability of Tourism \(MST\): Current state of play](#), “encouraged the finalization of the Statistical Framework for Measuring the Sustainability of Tourism for future submission to the Commission and noted the strong interest from countries in this work”.

To date, 55 countries (3 from the Middle East) have implemented, plan to implement or have expressed interest in undertaking an MST pilot. A 2nd edition of the publication [Experiences from Pilot Studies In Measuring the Sustainability of Tourism](#) will showcase new pilots.

## **Global Tourism Statistics**

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<sup>1</sup> Such as the [European Parliament resolution on establishing a strategy for sustainable tourism](#), [the Pacific Sustainable Tourism Policy Framework](#), etc.

UNWTO is responsible for the most comprehensive [international database](#) on inbound, outbound and domestic tourism, tourism industries, employment and macroeconomic indicators. Data is available through: [the Country Fact Sheets](#), [the Tourism Statistics web](#), the [Compendium of Tourism Statistics](#) and [Yearbook of Tourism Statistics](#) publications, [the Tourism Data Dashboard](#), [Barometer](#) and [eLibrary](#) as well as the [UN Data](#) portal.

UNWTO is custodian for two indicators in the UN Global SDG Indicator Framework and compiles data on Tourism GDP (SDG 8.9.1)—where UNWTO cooperates with OECD—and countries' implementation of tools to measure sustainable tourism (SDG 12.b.1). Data is available on the [UNWTO website](#), the [UN Global SDG Indicators Database](#), the [UN Open SDG Data Hub](#) and in the [UN Secretary-General's Progress Report](#) and [UN SDG report](#).

### **Capacity development in tourism statistics**

UNWTO invests in the development of countries' Systems of Tourism Statistics through regional training and technical assistance projects (±20-25 projects worldwide per year). A new technical assistance product on MST is being tested in selected countries.

### **Ethics**

During 2022, a follow-up study will be done to tackle the progress made on COVID-19 and the measures taken by the Signatories of the Private Sector Commitment to the Global Code of Ethics. In addition, it is expected that the number of said Signatories will increase as various entities and associations are interested in joining. Finally, all UNWTO and UN Member States are invited to adhere to the [UNWTO Framework Convention on Tourism Ethics](#) so it may enter into force following 10 ratifications.

### **Culture**

UNWTO will produce a set of recommendations, addressed to Member States, on incorporating the creative economy and creative industries into the cultural tourism offer. This set of guidelines will be the main outcome of a seminar to be held later 2022. In cooperation with the Council of Europe, a "Compendium of Good Practices in Creative Economy and Cultural Tourism along Cultural Routes" is being prepared. A compilation of cases studies on Indigenous Tourism in the Americas (in collaboration with the World Indigenous Tourism Alliance) will be also issued in 2022. Within the [Weaving the Recovery – Indigenous Women in Tourism](#) project, UNWTO and partners will create a training toolkit on empowering indigenous women and their communities, through cultural transmission, responsible tourism and fair trade, following the testing phase in a pilot country.

### **Social Responsibility**

In the field of social responsibility, the issue of Accessible Tourism for All will be in the spotlight, in particular, with the application of the recently published standard ISO 21902:2021 on accessibility, under the International Standards Organisation (ISO) framework. UNWTO and partners will produce a user guide on this new standard to support Member States in its implementation.

In the area of **women's empowerment and gender equality**, the twin publications on gender mainstreaming guidelines for the public and private sectors, respectively, will provide guidance to the sector on integrating a gender perspective into policy, programming and strategies with a view to increasing tourism's contribution to SDG 5.

In addition, the implementation of the pilot project ["Centre Stage: Women's empowerment during the COVID-19 recovery"](#) will continue to strengthen, coordinate and focus work towards gender equality in tourism governmental institutions and businesses, as they recover from the pandemic. This project is being implemented with the support of Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), on behalf

of the Federal Ministry for Economic Cooperation and Development of Germany, and UN Women. UNWTO supports 4 National Tourism Administrations, tourism businesses, NGOs and tourism organizations from Jordan, Costa Rica, the Dominican Republic and Mexico, as they implement a one-year action plan for women's empowerment.

#### IV. UNWTO Regional Office for the Middle East

The Secretariat is ready to deploy hired personnel, once all the legal issues are resolved by the host country and funding for 2022 is received in compliance with the Regional Office Agreement signed on 17 September 2020, the Office will start producing work and appropriate services to foster steady and sustainable recovery of the tourism sector in Member States from the Middle East Region. Two primary areas of work are 1) **Tourism and rural development**; 2) **Innovation, Education & Investments**.

##### Areas of work

**The UNWTO Tourism and Rural Development Programme** aims to contribute to the objectives of UNWTO by making tourism a driver of rural development and wellbeing. The Programme which will include the promotion of the Best Tourism Villages Initiative as well as the management of the Best Tourism Villages Network is structured around four pillars: 1) Knowledge Creation on Policy and Business Practices including the creation of a Tourism and Rural Development Observatory; 2) Training and Skills on the development of tourism and rural development for policy makers and local authorities; 3) Technical Assistance on specific projects on the ground and 4) Awareness Raising and Exchange of Best Practices.

**Innovation, Education & Investments.** Various activities have been carried out and will be intensified in the Middle East Region once the staff is deployed in Riyadh. Main areas of work - **Innovation:** 1) Supporting the digitalization process of tourism Small and Medium Enterprises (SMEs); 2) Fostering start-ups in the Region by organizing Tourism Tech Adventures Innovation Fora. **Education:** 1) Creating more added-value jobs in tourism through education; 2) Developing skills in tourism; 3) Promoting quality education in tourism; 4) Tourism Faculty Development Programme. **Investments:** 1) Green investments for green transitions; 2) Promotion of investments for a sustainable recovery (UNWTO Investment Guidelines).

##### Some ongoing operational issues

###### **Employment: Selection**

- **Advertisements:** 26 positions were advertised in total for the regional office
- **Applications:** More than 2000 applications (131 nationalities) were received from all regions of the world and over 300 interviews were conducted for the 26 advertised positions. Africa (35%) followed by Europe (26%) are main regions whose nationals applied for the said positions. The Middle East's share was just 15%.
- **Current status:** 4 positions were re-advertised as no suitable candidates were identified. Two persons were deployed to Riyadh in May and September 2021. The remaining positions are ready for deployment subject to the process of finalizing the issue of privileges and immunities to service contract holders by the host country.

###### **Employment: Privileges and Immunities**

- **Accreditation:** The issue of providing accreditations to the selected non-staff personnel of UNWTO (service contract holders) based in Riyadh, according to the Regional Office Agreement is being finalized by the host country. The provision of privileges and immunities to the personnel will facilitate contracted people to be deployed to the duty station in Riyadh.