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 5% upturn in 2021, with 18 million more international tourist arrivals as compared to 2020, but levels remained 71% below the pre-pandemic year 2019 according to the March 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. This is reflected in the 79% increase registered in international tourist arrivals in the period March-December 2021 vs. the same period of 2020. As of 8 April 2022 over 19 destinations had lifted all COVID-19 travel restrictions according to the UNWTO-IATA Destination Tracker – Easy Travel.

- Europe and the Americas recorded the strongest results by region in 2021 relative to 2020 with arrivals up 19% and 18% respectively, though both still remained 62% below 2019 levels. Africa saw a 14% increase in 2021 compared to 2020, though it remained 73% below 2019 levels. In Asia and the Pacific, arrivals dropped 65% from 2020 levels and 94% when compared to pre-pandemic values. In the Middle East, arrivals declined 8% in 2021 compared to 2020 and were 75% below 2019.

- By subregion, Central America (+58%) and Southern Mediterranean Europe (+57%) saw the best performance in 2021 over 2020, though both remained 55% below 2019. International arrivals in the Caribbean (+46%) increased 46% over 2020 and registered the smallest decline (-43%) among subregions over 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 (-45%) 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.

- The recovery trend continued in January 2022, with much better performance compared to the weak start of 2021. World arrivals more than doubled (+130%) compared to January 2021, an increase of 18 million. This is the same increase as in the whole of 2021 compared to 2020.

- Despite the robust results, the pace of recovery in January was impacted by the Omicron variant and the re-introduction of travel restrictions in several destinations. Arrivals were at -67% in January 2022 compared to 2019.

- IATA’s data shows that international RPKs rose 257% versus February 2021, improving from a 165% year-over-year increase in January 2022 versus the year-earlier period. All regions improved their performance compared to the prior month. February 2022 international RPKs were down 60% compared to the same month in 2019.

- According to ForwardKeys data included in the UNWTO Tourism Recovery Tracker, air bookings stood at -66% in March 2022, the best result since the start of the pandemic. The Middle East (-39%), Africa (-48%) and the Americas (-49%) showed the best performance in March 2022. Air bookings for Europe stood at -61% and Asia and the Pacific at -87%.

- However, major downside risks threaten the recovery of tourism in 2022. The military offensive of the Russian Federation on Ukraine coupled with a challenging economic environment, including high energy prices and rising inflation, could disrupt the already slow and uneven pace of recovery. Travel restrictions still in place in many destinations due to the ongoing pandemic could also delay recovery.
• The conflict risks hampering the return of confidence in global travel. The US and the Asian source markets, the latter opening recently, which tend to be more risk-averse, could be particularly impacted, especially regarding travel to Europe. The early weeks of March show a slowdown in overall bookings and searches for travel and UNWTO will continue to monitor the impacts through its regular Assessment Reports.

• Both Russia and Ukraine represent a combined share of 3% of global spending on international tourism in 2020, meaning at least US$14 billion in tourism receipts could be lost as a consequence of a prolonged conflict. As destinations these countries account for 4% of international arrivals in Europe and 1% of Europe's international tourism receipts.

• The importance of both markets is significant for neighbouring countries, but also for sun and sea destinations in Europe and beyond, including islands. The Russian market gained significant weight during the crisis in long-haul destinations such as Maldives (up from 5% in 2019 to 17% in 2021), Seychelles (from 3% to 17%) or Sri Lanka (from 5% to 9%).

• The military offensive is adding pressure to already challenging economic conditions, undermining consumer confidence and raising investment uncertainty. Adverse economic factors which could affect travel demand include surging oil prices and overall inflation, as well as interest rate hikes and the continued disruption of supply chains. The conflict has caused higher prices in commodities like energy and food, as Russia and Ukraine are major commodity exporters.

• The spike in oil prices (from lows of US$40 per barrel of Brent in 2020 to over US$100 in March 2022, the highest in 10 years), as well as rising inflation are making transport and accommodation more expensive, putting pressure on consumer purchasing power and savings as well as on operational costs for tourism businesses, many of which are still struggling to recover from COVID-19.

• The Organisation for Economic Co-operation and Development (OECD) estimates global growth could be more than 1 percentage point lower this year than was projected before the conflict. Inflation, already high at the start of the year, could be at least a further 2.5 percentage points higher. The price shock, especially on food and energy, risks disrupting the production of goods and services worldwide and increasing poverty.

• This forecast is in line with the analysis on the potential consequences of the conflict on global economic recovery and growth by the United Nations Conference on Trade and Development (UNCTAD), which has also downgraded its projection for world economic growth in 2022 from 3.6% to 2.6% and warned that developing countries will be most vulnerable to the slowdown.

• The effective resumption of international travel will also continue to depend on ensuring vaccine equity and coordinating the response among countries in terms of travel restrictions, harmonized safety and hygiene protocols, and effective communication to help restore consumer confidence.

• UNWTO scenarios for international tourist arrivals published in January 2022 pointed to 30% to 78% growth in international tourist arrivals in 2022 over 2021, depending on various factors. This would take international tourism to be still 50% to 63% below pre-pandemic levels at the global level, while bearing in mind the diverse recovery trends per region. Although these scenarios remain unchanged for now, they are subject to revision as health, geopolitical and economic factors evolve.
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 current mandate of the GTCC will be revised in order to strengthen its role and build more agile governance with the multiple crises the world is facing. 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. Organized under the French Presidency in Dijon, France, on 18 of March 2022. The UNWTO Secretary-General addressed 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 membership and encouraging them to join or re-join the Organization. The meeting aimed at continuing the 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. UNWTO is working with the Indonesian Presidency of the G20 as a Knowledge Partner in the creation of the outcome document of the forthcoming G20 Tourism Ministerial Meeting in September 2022. The document – G20 Bali Guidelines for Strengthening Communities and MSME as Tourism Transformation Agents: a People-Centered Recovery – will build upon the work developed by UNWTO on support and recovery from the pandemic as well as previous work with the G20 Tourism Working Group. UNWTO is also part of the wider UN collaboration with the Presidency aiming to identify concrete actions to be proposed by adoption at the G20 Leaders’ Summit.

• 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.

• ILO Technical meeting on COVID-19 and sustainable recovery in the tourism sector. Participation at the Technical meeting on COVID-19 and sustainable recovery in the tourism sector on 25-29 April 2022 in Geneva, Switzerland. The meeting discussed current and emerging issues in the context of COVID-19. Particular focus was on policies, strategies and good practices that
work towards a safe and sustainable recovery and advance decent and sustainable work. The aim is to adopt conclusions, including recommendations for future action by the ILO and its Members.

- **Tourism in the World Economic Situation and Prospects (WESP) of the UN**: The important role that tourism will play in the recovery of national economies and global trade has been highlighted in the [2022 edition of the WESP](https://www.unwto.org/wesp) report by the United Nations. Drawing on data from the World Tourism Organization (UNWTO), WESP underlines the sector’s importance for the world economy and particularly for developing economies, including Small Island Developing States (SIDS).

- **Tourism and SIDS**: UNWTO has addressed and supported the SIDS Global Business Network Forum held in Palau, on 12 April 2022 where one of the three thematic sessions was dedicated to tourism. Held bi-annually since 2016, the Forum took place on the margins of the Our Ocean Conference being hosted by Palau. The Network (SIDS-GBN) is an initiative by the UN Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States (OHRLLS) and aims to harnesses the innovation of the private sector to achieve sustainable development in SIDS.

**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 Russian 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 one-stop-shop 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).

**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 Cities for Sustainable Tourism on the occasion of the UNWTO Mayors’ Forum for Sustainable Urban Tourism, Madrid, Spain (20-21 October 2022).
- Smart Destinations Conference 2022 organized by the Ministry of industry, trade and tourism (Valencia, Spain, 23-25 November 2022).
- UNWTO/ISO cooperation on Tourism Destination Management Organizations (DMOs) for the development of guidelines/norms.
- Training and capacity building on destination management and the role of DMOs.
- MOOC on Sustainable Tourism, Destination Management and DMOs with UNWTO Tourism Online Academy and Lucerne University.
**Product Development & Diversification**

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

- 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).
- African Gastronomy Initiative.
- Measuring Wine Tourism Project with the International Organisation of Vine and Wine (OIV).
- 1st UNWTO Global Conference on Rural Development and Tourism (place and dates TBA).
- UNWTO Global Summit on Community-based Tourism (15-16 June 2022, Maldives on the occasion of the Regional Commission for Asia and the Pacific).
- Tourism and Rural Development: how local experiences build the image and value of a destination (3 June 2022, Armenia, on the occasion of the 67th Meeting of the UNWTO Commission for Europe).

**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.

Furthermore, there will be continuous support to startups. For this reason, the Tourism Tech Adventures innovation forums will continue to be carried out worldwide, proving a platform for tourism stakeholders and startups to meet for addressing the most compelling challenges with innovative solutions.

In addition, the first UNWTO Tourism Innovation and Digital Economy report will be released, setting a guide for decision-making.

**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 Policy Paper: UNWTO Tourism Education Roadmap to Tourism Nations on how to create a tourism education strategy and 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 strengthening process of the **UNWTO Tourism Online Academy** will continue, aiming to reach over 60 courses and 5 new academic partners. Likewise, the Scholarships Programme will keep supporting education in all regions.
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.

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.
- 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 CO₂ 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.
- Continue addressing the sustainable management of biodiversity, critical not only to keep a healthy nature as one of the core attractions for visitors and tourists but also to reduce risks of disease, including zoonosis. The UN Biodiversity Conference - COP15 summit, scheduled to take place in
late August - early September 2022 in Kunming, China, is a crucial meeting as it will adopt the Post 2020 Global Biodiversity Framework (GBF), a UN-led initiative for the conservation and sustainable use of biodiversity for the next decade and beyond, expected to have similar impact as the Paris Agreement.

**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 AlUla 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.\(^1\)

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 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**

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, the UNWTO World Tourism 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

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\(^1\) Such as the European Parliament resolution on establishing a strategy for sustainable tourism, the Pacific Sustainable Tourism Policy Framework, etc.
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.

A UNWTO Global Conference on Linking Tourism, Culture and the Creative Industries: Pathways to Recovery and Inclusive Development will be held in Lagos, Nigeria, on 28-30 November 2022.

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. The Gender Mainstreaming Guidelines for the Public Sector in Tourism is available in English, Spanish, French and Arabic. The Gender-inclusive Strategy for Tourism Businesses is available in English, Spanish, French and Arabic.

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.