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

- International tourism continued to consolidate its recovery in the first quarter of 2022, with a particularly strong performance in February and March according to the May 2022 issue of the UNWTO World Tourism Barometer.

- World arrivals nearly tripled in January-March 2022 (+182%) compared to the same period of 2021, with almost 76 million more international tourists.

- In March alone, an estimated 47 million international arrivals were recorded around the world, about 31 million more than in March 2021. Europe accounted for 50 million of the 76 million additional international arrivals recorded in Q1 2022.

- Despite the fact that the first three months of 2022 saw a strong rebound, arrivals still remained 61% below 2019 levels. In 2020, international tourist arrivals declined 72% and another 71% as compared to 2019 in 2021.

- Exports from international tourism reached an estimated US$ 713 billion in 2021 at global level, a 4% increase in real terms from 2020 but still 62% below 2019 levels. In the two years of the pandemic, an estimated US$ 2 billion were lost in export revenues from tourism due to the plunge in international travel.

- On the positive side, the decline in receipts (-62%) was smaller than the drop in arrivals (-71%) due to a strong increase in spending per international trip - from an average US$ 1,000 in 2019 to US$ 1,400 in 2021.

- Europe and the Middle East recorded the best results, with earnings climbing to about 50% of pre-pandemic levels in both regions. In Asia and the Pacific, income from international tourism was still 79% below 2019 levels with international tourism receipts down from US$ 441 billion pre pandemic to US$ 97 billion in 2021.

- All world regions enjoyed a significant rebound of arrivals in the first three months of 2022, though from weak levels at the start of 2021. Europe and the Americas continued to post by far the strongest results in the first quarter of 2022, with arrivals at -43% and -46% respectively compared to the same period of 2019.

- Asia and the Pacific recorded a 64% increase in January-March 2022 but stood at -93% compared to 2019, as several destinations remained closed to non-essential travel. Yet, recent weeks have seen a significant increase in the ease of travel restrictions in Asia, particularly in South Asia, which opens better prospects for recovery in region during the remaining of 2022.

- Worldwide, international tourism is expected to continue its recovery in 2022, as more destinations ease or lift travel restrictions and pent-up demand is unleashed. As of 31 May, 42 destinations had no COVID-19 related restrictions in place according to the UNWTO-IATA Destination Tracker – Easy Travel. (of which 27 in Europe, only 4 yet in in Asia) (DATA TO BE UPDATED THE DAY BEFORE AS THIS IS EVOLVING QUITE RAPIDLY)

- By end April, international air capacity across the Americas, Africa, Europe, North Atlantic and the Middle East has reached or is close to 80% of pre-crisis levels and demand is following. Asia is still only at 20% of its pre pandemic capacity.

- Considering first quarter results, booking trends as well as the results of the UNWTO Confidence Index, UNWTO has revised upwards its 2022 scenarios. New scenarios point to a recovery of 55% to 70% of pre pandemic levels and a probable return to 2019 volumes in 2023.

- Indeed, for the first time since the start of the pandemic the UNWTO Confidence Index exceeded the levels of 2019, with bullish expectations for the period May-August 2022, above those of May-August 2019.
According to experts, the economic environment has become the main factor weighing on the recovery of international tourism. Rising inflation and the spike in oil prices can translate into higher transport and accommodation costs, while putting consumer purchasing power and savings under pressure. Travel restrictions remain an important obstacle to the effective recovery of international tourism, while the Russian offensive in Ukraine is adding uncertainty to an already challenging economic and geopolitical environment.

The Russian offensive on Ukraine which started on 24 February seems to have had a limited direct impact on overall results so far, although it is disrupting travel in Eastern Europe. Yet, the conflict is having major economic effects by exacerbating already high oil prices, adding to overall inflation, and disrupting international supply chains, which results in higher transport and accommodation costs for the tourism sector. 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.

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 namely in Asia and the Pacific.

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 was held on 4 May 2022, at the UN Headquarters in New York, in the UN General Assembly Hall. The thematic debate was convened pursuant to General Assembly resolution 72/313 of 17 September 2018, entitled “Revitalisation of the work of the General Assembly”. It was the first time ever that a tourism event was 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](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 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 (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.

• 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).
• 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).
• 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 others1.

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.

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