Survey Findings on Members’ Priorities for the UNWTO Programme of Work (PoW) 2024-2025 and the Long-term Vision
Rationale of the Survey

• Define short and long-term approaches in terms of the sector's development vision and the required reforms for the Organization

• Identify member and non-member States' primary needs, challenges, and viewpoints for the UNWTO to address tailored services

• Consolidate feedback from the public sector and the industry stakeholders to reflect as a unified voice in the PoW
Characteristics of the Survey

• Planning and implementation phases and the rigor and transparent process

• Robust and reliable qualitative data derived and inductive method employed

• Closed and open-ended questions

• Diversity of focus: global, regional, sub-regional and national
Level of Performance

- 132 Member States and 4 Associate Members
- 82% of coverage of the entire membership (Full and Associate)
- Contributions received from 41 European States i.e. 100%
- Contributions received from 7 non-member States (worldwide)
Members Priorities for 2024-2025 (Europe)

- Marketing, positioning and promoting destinations: 56%
- Product development and diversification: 51%
- Sustainability, green transformation, climate change: 49%
- Human Capital Development: 39%
- Investments in infrastructures and destinations: 37%
- Innovation, digitalisation, technology: 34%
- Institutional strengthening: 32%
- Quality, international standards, accessibility: 29%
- Entrepreneurship, tourism job attractiveness: 24%
- Resilience, post disaster recovery: 17%
- Competitiveness, price policy: 15%
Short-term Challenges and Threats (Europe)

- Shortage in human capital / retaining talents: 51%
- Political instability: 39%
- Economic recession / Inflation: 34%
- Lack of green practices: 22%
- Mitigation of climate change: 22%
- Lack of tourism institutional framework: 17%
- Increasing competition among destinations: 15%
- Lack of funding, investments: 15%
- Digital gap: 15%
- Limited tourism infrastructures: 12%
- Health crisis / Recovery from COVID19: 10%
- Adaptation to climate change: 10%
## Opportunities for 2024-2025 (Europe)

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reform of tourism legal and policy framework or governance model</td>
<td>54%</td>
</tr>
<tr>
<td>Growing demand for specific destinations and products</td>
<td>41%</td>
</tr>
<tr>
<td>Innovation and digitalization</td>
<td>34%</td>
</tr>
<tr>
<td>Diversification of, or proximity with, source markets</td>
<td>34%</td>
</tr>
<tr>
<td>Diversification / differentiation of tourism offer</td>
<td>32%</td>
</tr>
<tr>
<td>Domestic tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Regional cooperation</td>
<td>15%</td>
</tr>
<tr>
<td>Raising quality (standards, labels)</td>
<td>15%</td>
</tr>
<tr>
<td>Favourable investment, PPP and business environments</td>
<td>12%</td>
</tr>
<tr>
<td>Strong potential: unique or unexplored natural or cultural assets</td>
<td>12%</td>
</tr>
</tbody>
</table>
Measuring the UNWTO Effectiveness

- Highly effective: 18%
- Effective: 54%
- Neither effective nor ineffective: 19%
- Ineffective: 5%
- Highly ineffective: 2%
The sector’s long-term development patterns (Europe)

- Sustainability: Shift in consumers demand: 44%
- Climate challenge: adapting and mitigating: 41%
- Digitalization along the tourism value chain: 37%
- Global shocks (pandemics, disasters, conflicts): 24%
- Awareness on protection of natural and cultural assets: 15%
- Products and markets diversification: 15%
- Need of capacity-building of staff: 12%
- Need for international cooperation: 10%
- Inadequate tourism infrastructures: 10%
The value of UNWTO in terms of outputs: Long-term approach

• Creating and disseminating knowledge: policy guidance, standards, regulatory frameworks, data, market intelligence

• Mainstreaming tourism in the global, regional and national agenda: Advocating the value of tourism on a political level and in different fora

• Supporting Members in their efforts on the ground to develop and promote the tourism sector: technical cooperation, training, etc.

• Building partnerships in tourism: Engaging with the private sector, NGOs, academia and research institutions, civil society and the UN system

• Mobilizing resources for development through tourism
Desirable Changes for the UNWTO’s Internal and External Environments (Europe)

<table>
<thead>
<tr>
<th>Change</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharing of experiences, lessons learnt and best practices among Members</td>
<td>17%</td>
</tr>
<tr>
<td>More involvement of Members’ delegates in activities</td>
<td>17%</td>
</tr>
<tr>
<td>More training and capacity-building courses on demand, including online</td>
<td>15%</td>
</tr>
<tr>
<td>Specific technical assistance by experts</td>
<td>15%</td>
</tr>
<tr>
<td>Adapt PoW according to regions and levels of development</td>
<td>15%</td>
</tr>
<tr>
<td>Enhance cooperation among members (twin programs, networks, etc.)</td>
<td>12%</td>
</tr>
<tr>
<td>Direct financial or in-kind assistance</td>
<td>12%</td>
</tr>
<tr>
<td>Support public-private partnerships</td>
<td>12%</td>
</tr>
<tr>
<td>Better communication on and access to content of UNWTO activities and data</td>
<td>10%</td>
</tr>
<tr>
<td>More sustainability</td>
<td>10%</td>
</tr>
</tbody>
</table>
An Extensive Consultative Process

1. EC 118: is informed on outline PoW
2. Regional Commissions: discuss lines of action PoW
3. EC 119: endorses draft PoW
4. GA 25: approves PoW
68th CEU Commission for Europe

31 MAY – 2 JUNE 2023, SOFIA, BULGARIA