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 29 Asian States and territories, i.e. 94%
- Contributions received from 7 non-member States (worldwide)
- Affiliate Members Board
Members Priorities for 2024-2025 (Asia and the Pacific)

- Product development and diversification: 48%
- Sustainability, green transformation, climate change: 48%
- Human Capital Development: 35%
- Marketing, positioning and promoting destinations: 32%
- Resilience, post disaster recovery: 32%
- Investments in infrastructures and destinations: 26%
- Entrepreneurship, tourism job attractiveness: 23%
- Innovation, digitalisation, technology: 23%
- Institutional strengthening: 19%
- Tourism for local development: 19%
- Quality, international standards, accessibility: 16%
Short-term Challenges and Threats (Asia and the Pacific)

- Shortage in human capital / retaining talents: 42%
- Health crisis / Recovery from COVID19: 32%
- Increasing competition among destinations: 29%
- Economic recession / Inflation: 23%
- Limited tourism infrastructures: 16%
- Adaptation to climate change: 16%
- Poor connectivity: 13%
- Lack of green practices: 13%
- Lack of tourism institutional framework: 13%
- Lack of funding, investments: 13%
- Digital gap: 10%
- Degradation natural and cultural resources: 10%
Opportunities for 2024-2025 (Asia and the Pacific)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growing demand for specific destinations and products</td>
<td>35%</td>
</tr>
<tr>
<td>Innovation and digitalization</td>
<td>23%</td>
</tr>
<tr>
<td>Favourable investment, PPP and business environments</td>
<td>19%</td>
</tr>
<tr>
<td>Destination branding and positioning</td>
<td>19%</td>
</tr>
<tr>
<td>Road, sea and air connectivity</td>
<td>19%</td>
</tr>
<tr>
<td>Diversification / differentiation of tourism offer</td>
<td>16%</td>
</tr>
<tr>
<td>Strong potential: unique or unexplored natural or cultural assets</td>
<td>16%</td>
</tr>
<tr>
<td>Improvement of tourism infrastructures, notably to be climate resilient</td>
<td>16%</td>
</tr>
</tbody>
</table>
Measuring the UNWTO Effectiveness

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highly effective</td>
<td>18%</td>
</tr>
<tr>
<td>Effective</td>
<td>54%</td>
</tr>
<tr>
<td>Neither effective nor ineffective</td>
<td>19%</td>
</tr>
<tr>
<td>Ineffective</td>
<td>5%</td>
</tr>
<tr>
<td>Highly ineffective</td>
<td>2%</td>
</tr>
</tbody>
</table>
The sector’s long-term development patterns and challenges
(Asia and the Pacific)

- Digitalization along the tourism value chain: 35%
- Sustainability: Shift in consumers demand: 29%
- Climate challenge: adapting and mitigating: 23%
- Inadequate tourism infrastructures: 23%
- Need of capacity-building of staff: 23%
- Need for international cooperation: 23%
- Global shocks (pandemics, disasters, conflicts): 16%
- Products and markets diversification: 13%
- Development of domestic tourism and mid-haul markets: 13%
- Need for strengthened tourism institutions and governance: 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
Desirable Changes for the UNWTO’s Internal and External Environments (Asia and the Pacific)

<table>
<thead>
<tr>
<th>Change</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More training and capacity-building courses on demand, including online</td>
<td>23%</td>
</tr>
<tr>
<td>Apply innovation at Secretariat and support MS with its implementation</td>
<td>16%</td>
</tr>
<tr>
<td>Sharing of experiences, lessons learnt and best practices among Members</td>
<td>16%</td>
</tr>
<tr>
<td>Specific technical assistance by experts</td>
<td>13%</td>
</tr>
<tr>
<td>Direct financial or in-kind assistance</td>
<td>13%</td>
</tr>
<tr>
<td>Support resource mobilization for Members</td>
<td>13%</td>
</tr>
<tr>
<td>Deliver policy guidance, strategic advice to governments</td>
<td>13%</td>
</tr>
</tbody>
</table>
Affiliate Members Survey for 2024-2025

A variant of the Survey adapted to the specific case of private and public local entities sent to the members of the Board of the Affiliate Members, to better incorporate in the future Programme of Work 2024-2025 the perspective of the private sector

Key desirable changes:
- Facilitating collaboration and partnerships
- Accelerating UNWTO decision-making process
- Better access to content of UNWTO activities and data

Opportunities:
- Growing demand for specific products
- Reshaping the business models into a more sustainable manner and improving the customer experience
An Extensive Consultative Process

- EC 118: is informed on outline PoW
- Regional Commissions: discuss lines of action PoW
- EC 119: endorses draft PoW
- GA 25: approves PoW