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 11 Middle East States, i.e. 85%
- Contributions received from 7 non-member States (worldwide)
Members Priorities for 2024-2025 (Middle East)

- Marketing, positioning and promoting destinations: 64%
- Investments in infrastructures and destinations: 55%
- Institutional strengthening: 45%
- Product development and diversification: 36%
- Sustainability, green transformation, climate change: 36%
- Entrepreneurship, tourism job attractiveness: 36%
- Human Capital Development: 27%
- Innovation, digitalisation, technology: 18%
- Quality, international standards, accessibility: 18%
- PPP, business integration: 18%
- Domestic tourism: 18%
- Facilitation, visa: 18%
Short-term Challenges and Threats (Middle East)

- Economic recession / Inflation: 55%
- Health crisis / Recovery from COVID-19: 27%
- Political instability: 18%
- Increasing competition among destinations: 18%
- Limited tourism infrastructures: 18%
- Poor connectivity: 18%
- Lack of green practices: 9%
- Lack of tourism institutional framework: 9%
- Lack of funding, investments: 9%
- Adaptation to climate change: 9%
- Seasonality: 9%
# Opportunities for 2024-2025 (Middle East)

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Diversification of, or proximity with, source markets</td>
<td>45%</td>
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<tr>
<td>Favourable investment, PPP and business environments</td>
<td>45%</td>
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<tr>
<td>Domestic tourism</td>
<td>27%</td>
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<tr>
<td>Reform of tourism legal and policy framework or governance model</td>
<td>18%</td>
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<tr>
<td>Growing demand for specific destinations and products</td>
<td>18%</td>
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<tr>
<td>Diversification / differentiation of tourism offer</td>
<td>18%</td>
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<td>Emblematic World or regional events (e.g. Football, Olympics)</td>
<td>18%</td>
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<td>Increasing support by communities and tourism stakeholders</td>
<td>18%</td>
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</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 and challenges (Middle East)

- Global shocks (pandemics, disasters, conflicts): 45%
- Need for a renown image: 27%
- Sustainability: Shift in consumers demand: 18%
- Increased global competition among destinations: 18%
- Climate challenge: adapting and mitigating: 9%
- Digitalization along the tourism value chain: 9%
- Awareness on protection of natural and cultural assets: 9%
- Inadequate tourism infrastructures: 9%
- Tourism job attractiveness: 9%

UNWTO - Regional Commission for the Middle East
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 (Middle East)

<table>
<thead>
<tr>
<th>Change</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>More training and capacity-building courses on demand, including online</td>
<td>36%</td>
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<td>More involvement of Members’ delegates in activities</td>
<td>27%</td>
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<td>Specific technical assistance by experts</td>
<td>27%</td>
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<tr>
<td>Better communication on and access to content of UNWTO activities and data</td>
<td>18%</td>
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<tr>
<td>Apply innovation at Secretariat and support MS with its implementation</td>
<td>18%</td>
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<tr>
<td>Strengthen resilience capacity</td>
<td>18%</td>
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</tbody>
</table>
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