Survey Findings on Members´Priorities for the UNWTO Programme of Work (PoW) 2024-2025 and the Long-term Vision (Agenda Item 5)
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:
  - 31 African States, i.e. 61%
  - 7 non-member States (worldwide)
- Affiliate Members Board
Members Priorities for 2024-2025 (Africa)

- Marketing, positioning and promoting destinations: 68%
- Investments in infrastructures and destinations: 55%
- Product development and diversification: 55%
- Human Capital Development: 48%
- Sustainability, green transformation, climate change: 29%
- Institutional strengthening: 29%
- Quality, international standards, accessibility: 23%
- Innovation, digitalisation, technology: 23%
- Domestic tourism: 23%
- Connectivity: 19%
- Statistics, evidence-based decision: 19%
- PPP, business integration: 16%
Short-term Challenges and Threats (Africa)

- Security and safety: 20%
- Health crisis / Recovery from COVID19: 18%
- Shortage in human capital / retaining talents: 16%
- Limited tourism infrastructures: 16%
- Economic recession / Inflation: 14%
- Lack of funding, investments: 14%
- Poor connectivity: 14%
- Increasing competition among destinations: 12%
Opportunities for 2024-2025 (Africa)

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Growing demand for specific destinations and products</td>
<td>18%</td>
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<tr>
<td>Improvement of tourism infrastructures, notably to be climate resilient</td>
<td>16%</td>
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<tr>
<td>Favourable investment, PPP and business environments</td>
<td>14%</td>
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<tr>
<td>Reform of tourism legal and policy framework or governance model</td>
<td>14%</td>
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<td>Strong potential: unique or unexplored natural or cultural assets</td>
<td>12%</td>
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<td>Increasing support by communities and tourism stakeholders</td>
<td>10%</td>
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<td>Promoting a good level of security and safety in the country</td>
<td>10%</td>
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<tr>
<td>Putting tourism higher in the national agenda</td>
<td>10%</td>
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Measuring the UNWTO Effectiveness

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

- Sustainability: Shift in consumers demand (58%)
- Digitalization along the tourism value chain (29%)
- Inadequate tourism infrastructures (26%)
- Need for international cooperation (23%)
- Development of domestic tourism and mid-haul markets (23%)
- Need for strengthened tourism institutions and governance (16%)
- Awareness on protection of natural and cultural assets (13%)
- Global shocks (pandemics, disasters, conflicts) (13%)
- Need for a renown image (13%)
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 (Africa)

<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>22%</td>
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<td>Enhance cooperation among members (twin programs, networks, etc.)</td>
<td>22%</td>
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<tr>
<td>Expanding and decentralizing the Organization</td>
<td>22%</td>
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<td>Specific technical assistance by experts</td>
<td>19%</td>
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<td>Support resource mobilization for Members</td>
<td>19%</td>
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<tr>
<td>Deliver policy guidance, strategic advice to governments</td>
<td>19%</td>
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<tr>
<td>Adapt PoW according to regions and levels of development</td>
<td>19%</td>
</tr>
<tr>
<td>Apply innovation at Secretariat and support MS with its implementation</td>
<td>11%</td>
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<tr>
<td>More involvement of Members’ delegates in activities</td>
<td>11%</td>
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</tbody>
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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