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7. Draft general programme of work for the period 2016 - 2017: Report on the survey on priority areas of the programme

Summary Report

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1. Introduction

1.1. Background

From October to December 2014, a survey on Members' priorities was conducted by the UNWTO Secretariat in order to prepare the Organization's General Programme of Work and Regular Budget for 2016-2017. Two separate questionnaires were made available online, one for Full and Associate Members and one for Affiliate Members, the latter including minor differences in order to adapt it to their membership.

The survey was built around the two main strategic objectives of the Organization: Sustainability/Ethics and Competitiveness/Quality. It also raised two questions that will be analysed separately by the Secretariat regarding resource mobilization and cooperation.

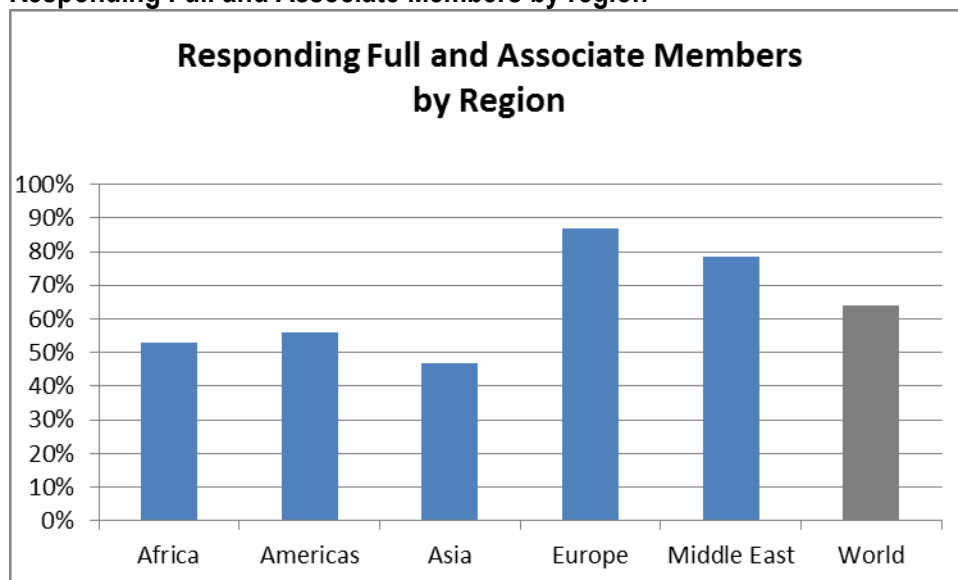
This report follows the structure of the survey and presents its key results, first for the Full and Associate Members, then for the Affiliate Members.

1.2. Level of response

- **Full and Associate Members**

Considering the relative complexity of the questionnaire, the level of replies received (64%, i.e., 103 Full Members and three Associate Members¹) is considered to be representative of this membership, with some disparities among regions as shown in the following graph.

Responding Full and Associate Members by region

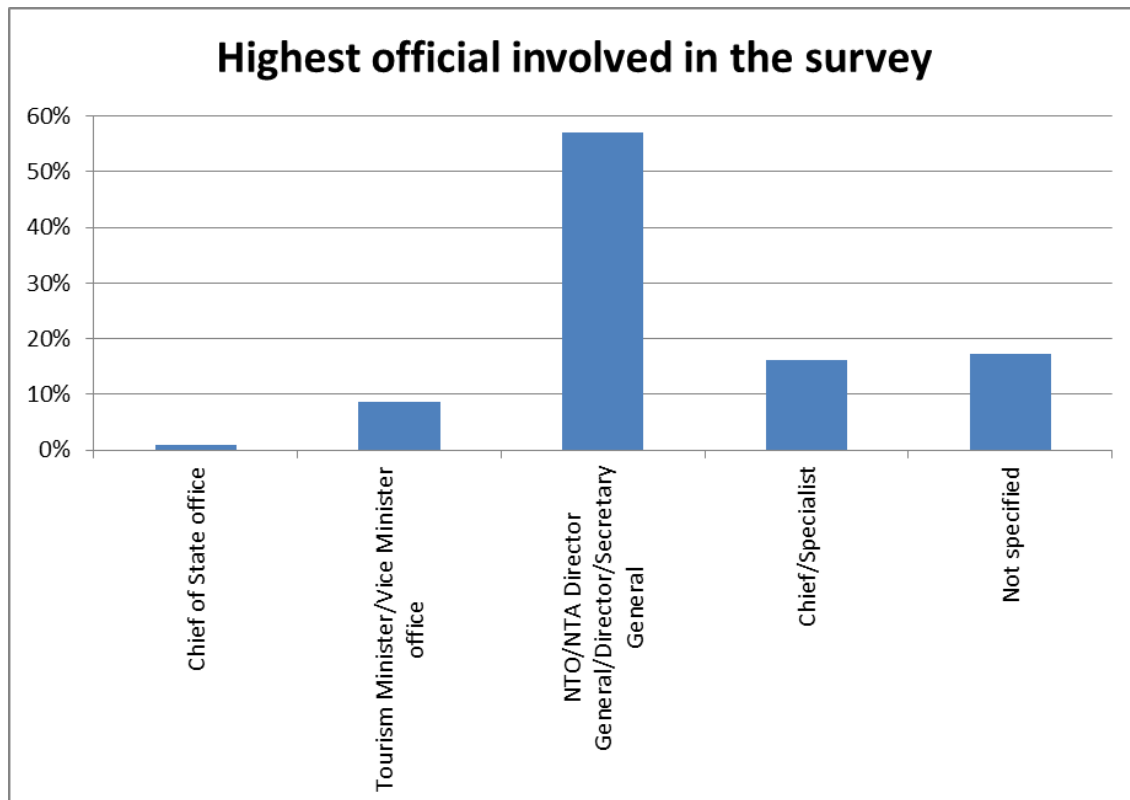


The list of Full and Associate Members who responded to the survey is available in **Annex I**.

¹ For information, for the previous biennium 2014-2015, the level of replies was 60%.

Respondents were also requested to indicate their names and titles. The following graph shows the distribution of the highest officials involved in responding to the survey. Nearly 70% were of Director level or above:

Highest official involved in responding the survey



- **Affiliate Members**

45 Affiliate Members answered the survey (around 25%).

2. Sustainability and Ethics

2.1. Full and Associate Members' priorities

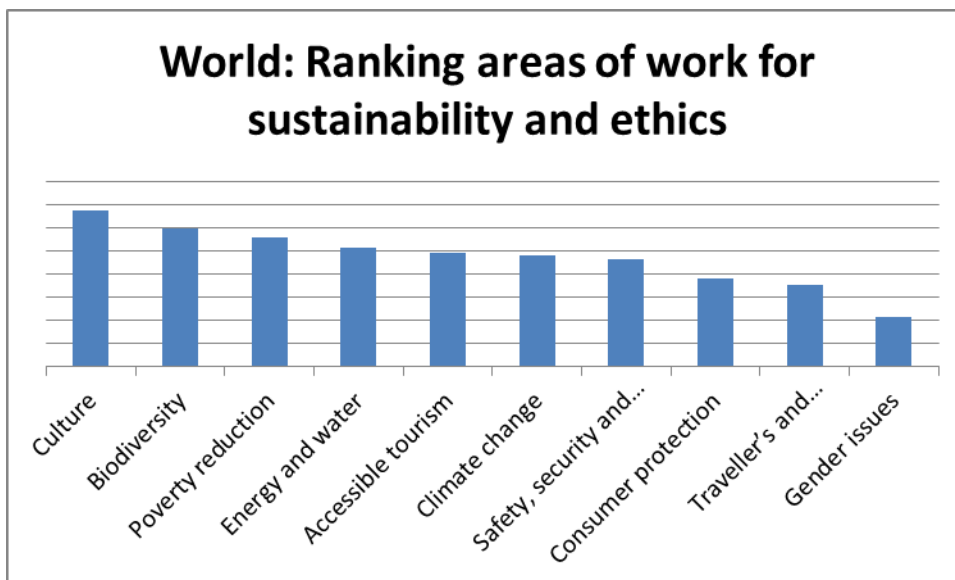
In the survey, Full and Associate Members were requested the following in relation with sustainability and ethics:

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism sustainability and ethics:
 - a. Biodiversity
 - b. Climate change
 - c. Energy and water
 - d. Culture
 - e. Poverty reduction
 - f. Gender issues
 - g. Traveller's and corporate social responsibility

- h. Consumer protection
 - i. Accessible tourism
 - j. Safety, security and peace
- To formulate specific comments on any of the above areas of work, and to indicate any other area of work to consider.

By cumulating all the rankings established by Members, we can establish an overall ranking of areas of work linked with sustainability and ethics. The results are shown in the following graph:

Sustainability: Ranking of priority areas for Full and Associate Members



For regional results, **see Annex II.**

Comments received regarding the different sustainability areas of work will be used by the Secretariat when preparing specific activities in the coming biennium.

2.2. Suggestions of additional areas of work

In relation with sustainability and ethics, Members made the following additional recommendations to the Secretariat:

- To work on sustainable development of tourism (SDT) applied to specific segments (e.g., coastal or urban tourism)
- To consider fair tourism and community development
- To brainstorm about financing models for sustainable tourism and incentive mechanisms for investors.
- To consider capacity-building activities for tourism boards in order for them to respond to new tourism demands and to support governments in tourism education and training for youth and local people.
- To keep the standardization work, notably in relation with green standards for the tourism industry
- To link the work done in market research to sustainability issues

- To facilitate horizontal and vertical cooperation within the sector on sustainability issues: PPP and transnational cooperation (e.g., EU and UNWTO)
- To support Members in linking land-use planning and sustainable tourism
- To keep working on tools and indicators aiming at monitoring sustainability

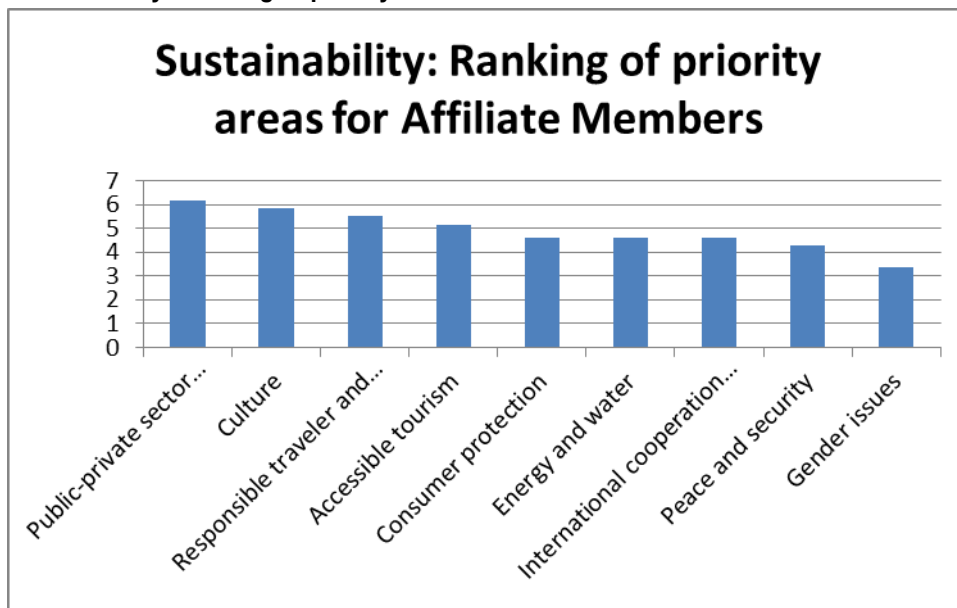
2.3. Affiliate Members' priorities

In the survey to Affiliate Members, the following question was raised: According to your organization's needs, please establish a hierarchy of relevance among the following areas of work:

- Energy and water
- Culture
- Gender issue
- Responsible traveller and Corporate Social Responsibility (CSR)
- Consumer protection
- Accessible tourism
- Public-private sector collaboration
- Peace and security
- International cooperation for development

The results obtained are shown in the following graph:

Sustainability: Ranking of priority areas for Affiliate Members



3. Competitiveness and Quality

3.1. Full and Associate Members' priorities

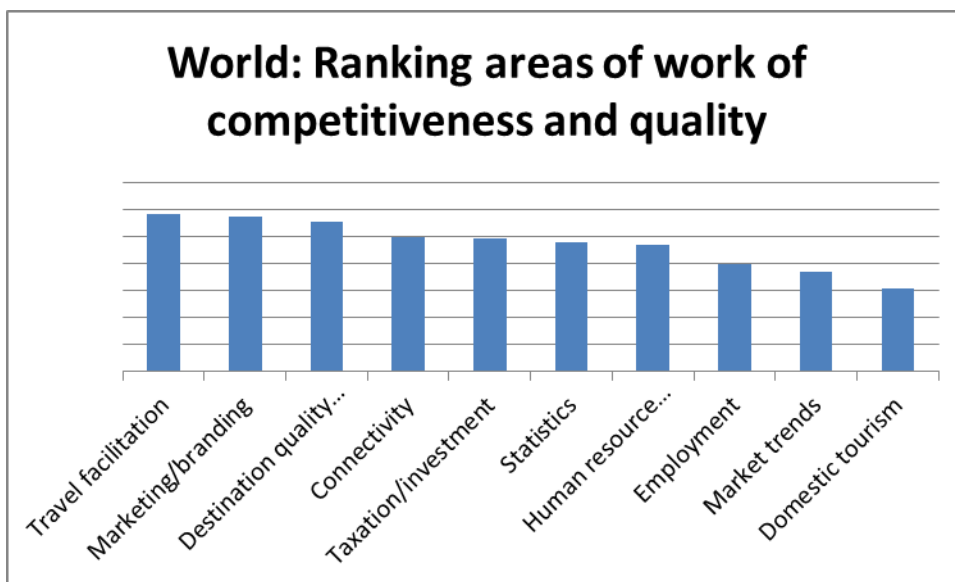
In this part, similarly, Full and Associate Members were requested the following:

- To establish a hierarchy of relevance (ordinal ranking) among the following areas of work related to tourism Competitiveness and Quality:

- a. Travel facilitation
 - b. Taxation/investment
 - c. Connectivity
 - d. Marketing/branding
 - e. Destination quality management
 - f. Statistics
 - g. Market trends
 - h. Domestic tourism
 - i. Employment
 - j. Human resource development
- To formulate specific comments on any of the above areas of work, and to indicate any other area of work.

By cumulating all the rankings established by Members, we can establish a classification overall ranking for areas of work linked with competitiveness and quality. Results are shown in the following graph:

Competitiveness: Ranking of priority areas for Full and Associate Members



For regional results, see **Annex III**.

Comments received regarding the different competitiveness areas of work will be used by the Secretariat when preparing specific activities in the coming biennium.

3.2. Suggestions of additional areas of work

In relation with competitiveness, Members made the following additional recommendations to the Secretariat:

- To reinforce tourism governance through a) better cooperation among public bodies and between public and private sectors, b) better regional cooperation and c) better and deeper political and institutional cooperation within countries (between line ministries)
- To focus on development through tourism, including the issue of resource mobilization

- To partner for innovation and new technologies in tourism product development, with a focus on SMEs.
- To strengthen institutional capacity through tourism education and build community capacity through training
- To advocate for a fairer travel advisory system
- To facilitate online exchange of experiences (recommended practices) and knowledge transfer
- To continue the work on seasonality, i.e., products for low season and new marketing tools, notably in relation with social media

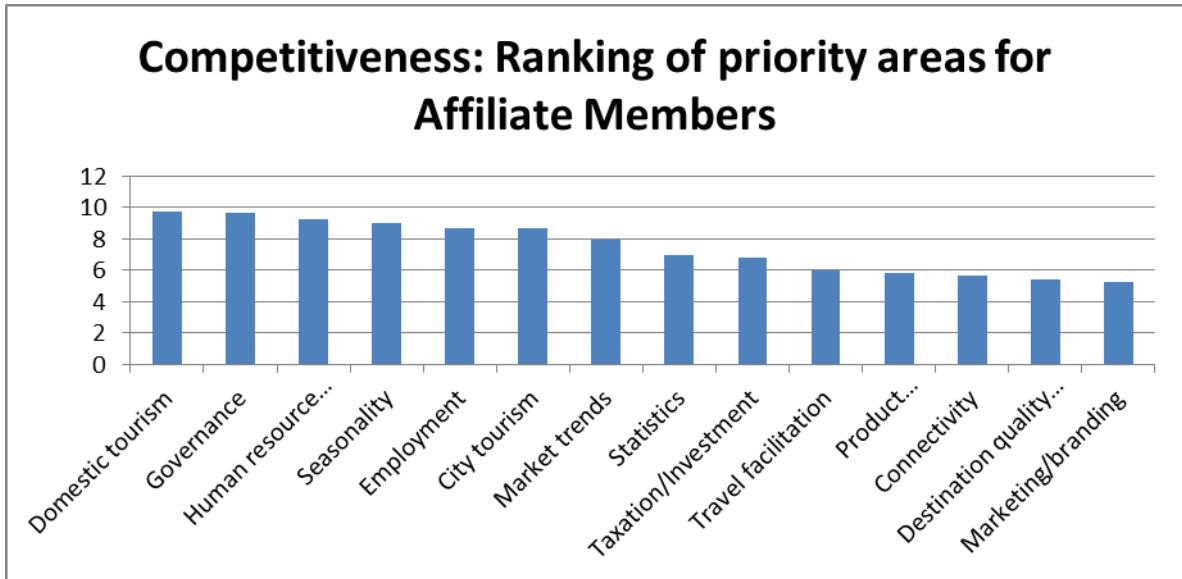
3.3. Affiliate Members' priorities

In the survey to Affiliate Members, the following question was raised: According to your organization's needs, please establish a hierarchy of relevance among the following areas of work:

- Travel facilitation
- Taxation/investment
- Connectivity
- Marketing/branding
- Product development
- Destination quality management
- Statistics
- Market trends
- Domestic tourism
- City Tourism
- Seasonality
- Human resource development
- Governance
- Employment

Results obtained are shown in the following graph:

Competitiveness: Ranking of priority areas for Affiliate Members



Annexes

Annex I: List of Full and Associate Members that responded to the survey

Africa

1. Angola
2. Botswana
3. Burkina Faso
4. Cameroon
5. Cape Verde
6. Chad
7. Côte d'Ivoire
8. Democratic Republic of the Congo
9. Ghana
10. Madagascar
11. Malawi
12. Mauritius
13. Morocco
14. Mozambique
15. Niger
16. Rwanda
17. Senegal
18. Seychelles
19. Sierra Leone
20. South Africa
21. Sudan
22. Togo
23. Tunisia
24. United Republic of Tanzania
25. Zambia
26. Zimbabwe

Americas

27. Bolivia
28. Brazil
29. Chile
30. Colombia
31. Costa Rica
32. El Salvador
33. Guatemala
34. Honduras
35. Jamaica
36. Mexico
37. Nicaragua
38. Panama

39. Paraguay

40. Peru

41. Venezuela

Asia

South Asia

42. Bangladesh
43. Bhutan
44. Iran, Islamic Republic of
45. Maldives

East Asia and the Pacific

46. Cambodia
47. China
48. Indonesia
49. Japan
50. Lao People's Democratic Republic
51. Malaysia
52. Myanmar
53. Philippines
54. Republic of Korea

Associate Member

55. Macao, China

Europe

56. Albania
57. Andorra
58. Armenia
59. Austria
60. Azerbaijan
61. Belarus
62. Bosnia and Herzegovina
63. Bulgaria
64. Croatia
65. Cyprus
66. Czech Republic
67. France
68. Georgia
69. Greece
70. Hungary

71. Israel

72. Kazakhstan

73. Kyrgyzstan

74. Lithuania

75. Monaco

76. Montenegro

77. Poland

78. Portugal

79. Republic of Moldova

80. Romania

81. Russian Federation

82. San Marino

83. Serbia

84. Slovakia

85. Slovenia

86. Spain

87. Switzerland

88. Tajikistan

89. The former Yugoslav Republic of Macedonia

90. Turkey

91. Turkmenistan

92. Ukraine

93. Uzbekistan

Associate Member

94. Flanders

95. Madeira, Portugal

Middle East

96. Egypt

97. Iraq

98. Jordan

99. Kuwait

100. Lebanon

101. Libya

102. Oman

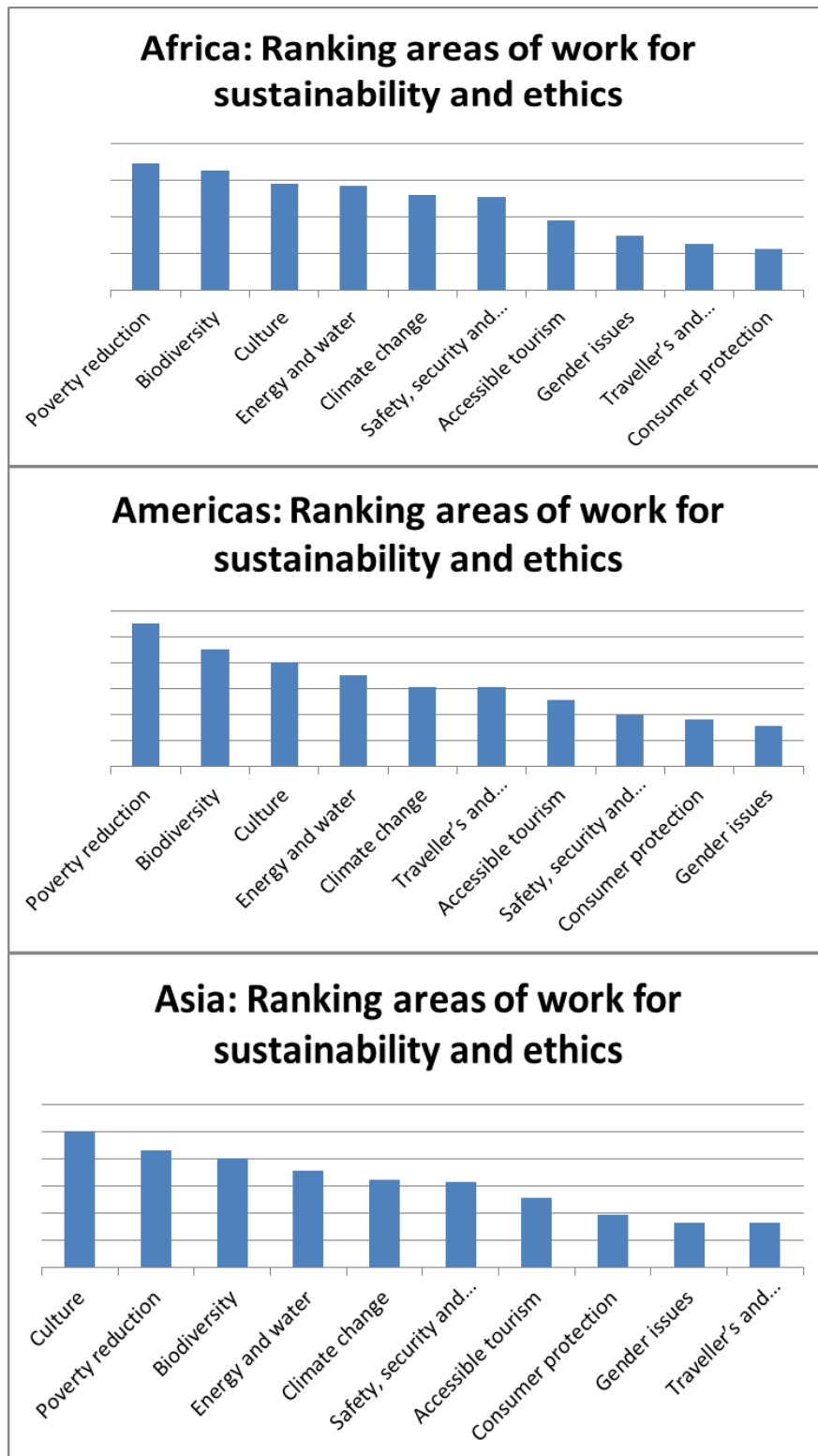
103. Saudi Arabia

104. Syrian Arab Republic

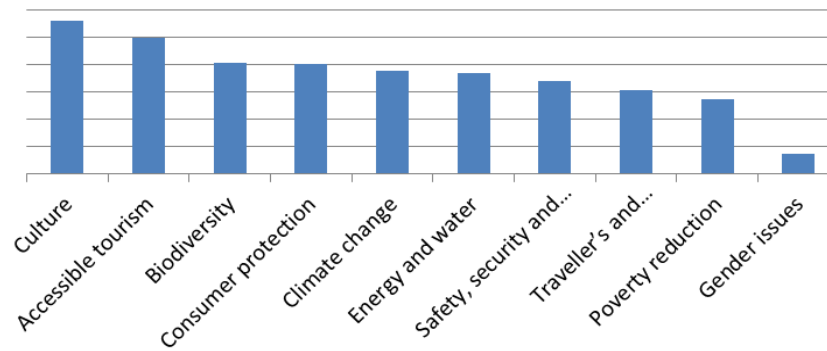
105. United Arab Emirates

106. Yemen

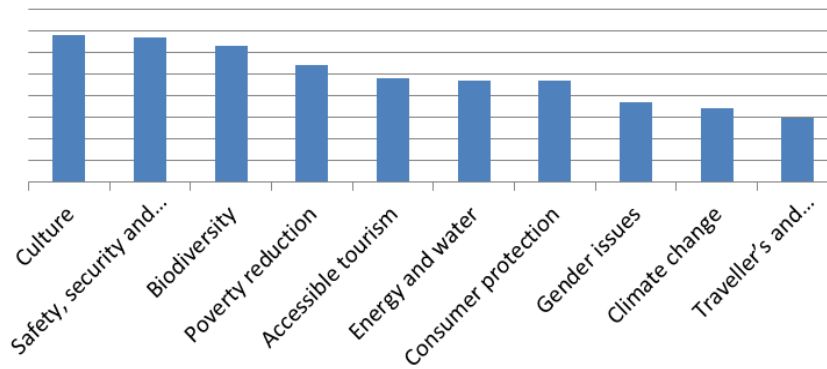
Annex II: Sustainability issues, ranking areas of activity by region



Europe: Ranking areas of work for sustainability and ethics



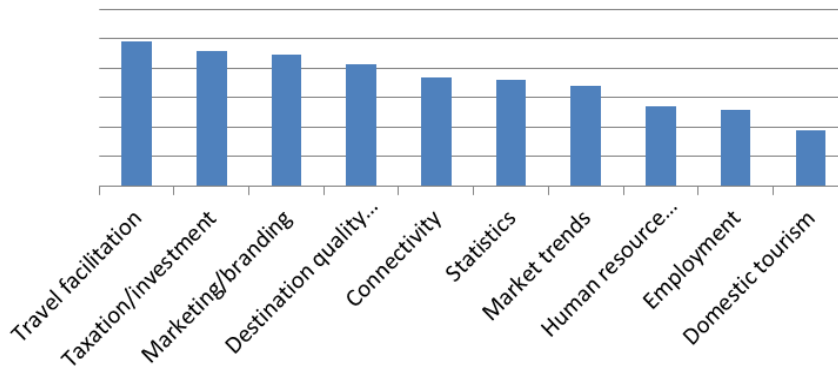
Middle East: Ranking areas of work for sustainability and ethics



Annex III: Competitiveness and Quality, ranking areas of activity by region



Europe: Ranking areas of work of competitiveness and quality



Middle East: Ranking areas of work of competitiveness and quality

