The Tourism Market in Africa

Investour
Fitur (Ifema), Madrid, Spain
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John G.C. Kester
Tourism Trends and Marketing Strategies
Programme
Objective: monitoring short-term evolution of worldwide tourism

Frequency: full issue 3 times a year (January, June, October) and two Interim Updates

Permanent elements:
- Short term tourism data
- In focus
- UNWTO Panel of Tourism Experts
- Economic data relevant for tourism

www.unwto.org/facts
2010: Multi-speed recovery

International tourist arrivals, 1995-2010*

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals (million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>528</td>
</tr>
<tr>
<td>2000</td>
<td>626</td>
</tr>
<tr>
<td>2005</td>
<td>675</td>
</tr>
<tr>
<td>2010*</td>
<td>935</td>
</tr>
</tbody>
</table>

935 mn
Inbound tourism Africa

International tourist arrivals, 1995-2010*

19 21 22 24 25 27 27 28 30 33 35 40 43 44 46

49 mn

0 10 20 30 40 50 60

million

1995 2000 2005 2010*
International Tourist Arrivals, monthly evolution

World (% change)

Source: World Tourism Organization (UNWTO) ©
International Tourist Arrivals, monthly evolution

Advanced economies & Emerging economies (% change)

Source: World Tourism Organization (UNWTO) ©
Growth driven by emerging destinations

International tourist arrivals by country of destination

- Advanced economies
- Emerging economies

Source: World Tourism Organization
Growth driven by emerging destinations

International tourist arrivals by country of destination

- Advanced economies
- Emerging economies

Source: World Tourism Organization
Most arrivals within own region

International tourist arrivals by country of destination

- To emerging economies from other region
- To emerging economies from same region
- To advanced economies from other region
- To advanced economies from same region

Source: World Tourism Organization
International Tourist Arrivals, monthly evolution

Africa (% change)

Source: World Tourism Organization (UNWTO) ©
International Tourist Arrivals (% change over same period of the previous year)

Source: World Tourism Organization (UNWTO) ©

Multi-speed recovery
Is it just a ‘dead cat bounce’ or a real new up-trend?


You Are Here
International Tourist Arrivals, monthly evolution

World (million)

Source: World Tourism Organization (UNWTO) ©
International Tourist Arrivals, monthly evolution

Africa

Source: World Tourism Organization (UNWTO) ©
2010 compared to pre-crisis peak year 2008

International Tourist Arrivals

<table>
<thead>
<tr>
<th>Region</th>
<th>Change 2010 over pre-crisis peak year 2008 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>-5.5</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>1.9</td>
</tr>
<tr>
<td>Western Europe</td>
<td>-6.3</td>
</tr>
<tr>
<td>Central/Eastern E..</td>
<td>-1.6</td>
</tr>
<tr>
<td>Southern/Mediterr. E.</td>
<td>16.6</td>
</tr>
<tr>
<td>North-East Asia</td>
<td>12.7</td>
</tr>
<tr>
<td>South-East Asia</td>
<td>4.2</td>
</tr>
<tr>
<td>Oceania</td>
<td>7.5</td>
</tr>
<tr>
<td>South Asia</td>
<td>1.5</td>
</tr>
<tr>
<td>North America</td>
<td>0.7</td>
</tr>
<tr>
<td>Caribbean</td>
<td>0.3</td>
</tr>
<tr>
<td>Central America</td>
<td>7.8</td>
</tr>
<tr>
<td>South America</td>
<td>8.4</td>
</tr>
<tr>
<td>North Africa</td>
<td>10.7</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>7.5</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

<table>
<thead>
<tr>
<th>Region</th>
<th>Absolute change 2010 over pre-crisis peak year 2008, million</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>22.4</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>-3.1</td>
</tr>
<tr>
<td>Western Europe</td>
<td>-6.3</td>
</tr>
<tr>
<td>Central/Eastern E..</td>
<td>-2.8</td>
</tr>
<tr>
<td>Southern/Mediterr. E.</td>
<td>10.8</td>
</tr>
<tr>
<td>North-East Asia</td>
<td>7.9</td>
</tr>
<tr>
<td>South-East Asia</td>
<td>0.5</td>
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<td>Oceania</td>
<td>0.8</td>
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<td>South Asia</td>
<td>1.5</td>
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<td>Central America</td>
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<td>North Africa</td>
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<tr>
<td>Sub-Saharan Africa</td>
<td>4.2</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) ©
International Tourism
International tourist arrivals and receipts and market share (%)

International Tourist Arrivals (ITA), 2010*
935 million

International Tourism Receipts (ITR), 2009*
US$ 852 billion

- **Americas**
  - ITA: 151 million (16%)
  - ITR: US$ 165 billion (19%)

- **Africa**
  - ITA: 49 million (5%)
  - ITR: US$ 29 billion (3%)

- **Europe**
  - ITA: 472 million (50%)
  - ITR: US$ 413 billion (49%)

- **Middle East**
  - ITA: 60 million (6%)
  - ITR: US$ 41 bn (5%)

- **Asia and the Pacific**
  - ITA: 204 million (22%)
  - ITR: US$ 204 billion (24%)
Average annual growth rate 2000-2010

International tourist arrivals (% a year 2000-2010)

Source: UNWTO
Inbound tourism Africa

International tourism receipts, 1995-2009*

US$ 29 bn

World Tourism Organization
Committed to Tourism, Travel and the Millennium Development Goals
Some 50 very diverse countries...
Receipts by destination, 2009

Africa

2009: US$ 29 billion
Top 20: 91%
Other 32 destinations: 9%

Source: UNWTO
Arrivals by purpose of visit, 2009

**World**
- Leisure, recreation and holidays: 51%
- VFR, Other: 27%
- Business and professional: 15%
- Not specified: 7%

**Africa**
- Leisure, recreation and holidays: 56%
- VFR, Other: 32%
- Business and professional: 12%

Source: UNWTO
Arrivals to Africa by means of transport

Source: World Tourism Organization
tourism source markets from a destination point of view

- Domestic tourism
- International tourism
  - Intraregional tourism
  - Interregional tourism
  - Expatriates / diaspora

- Each has its own characteristics
- Sources are very much complementary
- All might be needed to reach critical mass
- All have a role to play in a balanced development of tourism
International tourism: Regions generally depend mostly on intra-regional tourism

Inbound tourism by origin, 2005

World
- Same region: 78%
- From other regions: 20%
- Not specified: 2%

Europe
- Same region: 87%
- From other regions: 12%
- Not specified: 1%

Asia and the Pacific
- Same region: 77%
- From other regions: 21%
- Not specified: 2%

Americas
- Same region: 72%
- From other regions: 25%
- Not specified: 3%

Africa
- Same region: 46%
- From other regions: 44%
- Not specified: 1%

Middle East
- Same region: 45%
- From other regions: 52%
- Not specified: 3%
Arrivals to Africa intra- versus interregional

Source: World Tourism Organization
Arrivals to Africa by region of origin, 2009

Africa

Europe (31%)
Origin not specified (14%)
Middle East (5%)
Americas (4%)
Asia and the Pacific (3%)
Africa (43%)

Source: UNWTO
Arrivals to Africa by region of origin, 2009

Source: UNWTO
Outlook
Confidence confirmed

UNWTO Panel of Tourism Experts

Source: World Tourism Organization (UNWTO) ©
Confidence confirmed

Source: World Tourism Organization (UNWTO) ©
Outlook 2011: growth to continue at more moderate pace

International Tourist Arrivals

Forecast 2011: 4% to 5%

Source: World Tourism Organization (UNWTO)
Africa: growth picking up again in 2010

International Tourist Arrivals

Forecast 2011: 4% to 7%

Source: World Tourism Organization (UNWTO)
### International Tourism 2011 –Forecast

<table>
<thead>
<tr>
<th>Region</th>
<th>2010</th>
<th>Forecast 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+6.7%</td>
<td>4% to 5%</td>
</tr>
<tr>
<td>Europe</td>
<td>+3.2%</td>
<td>2% to 4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+12.6%</td>
<td>7% to 9%</td>
</tr>
<tr>
<td>Americas</td>
<td>+7.7%</td>
<td>4% to 6%</td>
</tr>
<tr>
<td>Africa</td>
<td>+6.4%</td>
<td>4% to 7%</td>
</tr>
<tr>
<td>Middle East</td>
<td>+13.9%</td>
<td>7% to 10%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Actual Trend vs. Tourism 2020 Vision Forecast

World

International Tourist Arrivals

Source: World Tourism Organization (UNWTO)
Actual Trend vs. Tourism 2020 Vision Forecast
Africa

International Tourist Arrivals

- Tourism 2020 Vision forecast
- Actual 1995-2009

Source: World Tourism Organization (UNWTO)
Thank you very much for your attention!

World Tourism Organization (UNWTO)

www.unwto.org

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Tourism Trends and Marketing Strategies Programme
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International Tourist Arrivals by Subregion
Average Annual Growth Rate, 1995-2020

Average Annual Growth Rate
(number of countries between brackets)

- > 6.6 % (25)
- 5.1 - 6.5 % (57)
- 3.6 - 5.0 % (96)
- 0 - 3.5 % (37)
Confidence confirmed

UNWTO Panel of Tourism Experts

Source: World Tourism Organization (UNWTO) ©
Confidence confirmed

Source: World Tourism Organization (UNWTO) ©
2009: African destinations

International Tourist Arrivals

Source: World Tourism Organization (UNWTO)
International Tourist Arrivals, 1950-2020
Current situation and forecasts UNWTO Tourism 2020 Vision

- Middle East
- Africa
- Asia and the Pacific
- Americas
- Europe

Actual

Forecasts

- 880 mn
- 1 bn
- 536 mn
- 1.6
International tourism

Emerging destinations tend to grow faster and maintained differential in 2009

% change over previous year

-7 -6 -5 -4 -3 -2 -1 0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

-1 -2 -3 -4 -5 -6 -7

'96/'95 '97/'96 '98/'97 '99/'98 '00/'01 '01/'02 '02/'03 '03/'04 '04/'05 '05/'06 '06/'07 '07/'08 '08/'09 '09/'10

Advanced economies
Emerging economies
AAG 1995-2008
AAG 1995-2008

International tourism

Emerging destinations tend to grow faster and maintained differential in 2009
**Preliminary conclusions**

- considerable resilience and capacity of recovery against adverse conditions (economic downturns, terrorism, health threats, natural disasters, etc.)

- strong underlying demand, with still huge potential for growth:
  - both from increase of participation and increased frequency: more often but shorter stays
  - from current travellers but above all from new emerging middle classes
  - sizable populations in developing countries currently still only take part in international tourism very limitedly
  - many emerging economies show rapid economic growth resulting in increasing disposable incomes, a relative big share of this increase will be spent on tourism (domestic as well as international)
Thank you very much for your attention!

World Tourism Organization (UNWTO)

www.unwto.org

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