The World Tourism Organization (UNWTO)

- a specialized agency of the United Nations (UN) and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how.

- plays a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, paying particular attention to the interests of developing countries.

- intergovernmental organization with membership includes 161 countries and territories and over 400 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

- encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.

Overview

- Tourism development in Africa
- UNWTO long-term outlook *Tourism Towards 2030*
- Visa facilitation: stimulating economic growth and development through tourism
2012: one billion international arrivals in one year for the first time

<table>
<thead>
<tr>
<th>1,035,000,000 international tourists (overnight visitors)</th>
<th>generating</th>
</tr>
</thead>
<tbody>
<tr>
<td>US$ 1,075,000,000,000 international tourism receipts</td>
<td>US$ 1,040 on average per arrival</td>
</tr>
</tbody>
</table>
Inbound tourism: Africa

International tourist arrivals and receipts, 1995-2012*

- International tourist arrivals (million)
- International tourism receipts (US$ billion)

US$ 34 bn

Source: World Tourism Organization (UNWTO)

US$ 640 on average per arrival

Outlook: Africa

Forecast
2013: 4% to 6%

Source: World Tourism Organization (UNWTO)
Inbound tourism Africa
Growth in all subregions

International tourism receipts, 1995-2012* (US$ billion)

North Africa
South Africa
East Africa
West & Central Africa

Source: World Tourism Organization (UNWTO)

... but still concentrated in relative few destinations

Africa
Receipts by destination

2011: US$ 33 billion
Top 20: 91%; other 32 destinations: 9%

Source: UNWTO
International tourism vs. other export categories

International tourism:
- 5.5% of exports of goods and services
- 30% of export of services

Share in trade and services by subregion

International Tourism (travel and passenger transport), 2010
International tourism vs. other export categories

International tourism:
3rd category after fuels and other mining products
7% of exports of goods and services
57% of export of services

China has become number 1 outbound market with US$ 102 bn in 2012
International Tourism Expenditure: 2006-2012 (US$ billion)

High potential outbound markets

- Between 2006 and 2012 total up by US$ 330 billion, from US$ 745 billion in 2006 to 1,075 billion in 2012 (current terms) in spite of crisis
- Average annual growth rate in real terms +2.7% a year

African outbound markets

- Between 2006 and 2012 total up by US$ 8 billion, from US$ 15 billion in 2006 to an estimated 23 billion in 2012 (current terms)
- Average annual growth rate in real terms +5% a year
Tourism Towards 2030 Advance Edition: Key Results

5th UNWTO-PATA Forum on Tourism Trends and Outlook
Guilin, China, 27 October 2011

Michel Julian, UNWTO Tourism Trends and Marketing Strategies Programme

International tourist arrivals to reach 1.8 billion by 2030

Source: World Tourism Organization (UNWTO) ©
Emerging economy destinations to surpass advanced destinations in 2015

Inbound tourism, advanced and emerging economies

Asia and the Pacific, the Middle East and Africa to increase their shares
Africa: growth in international tourism to continue at 5% a year on average

International Tourism, Africa

International tourist arrivals, % change over previous year

Average growth 2010-2030
5.0% a year

2010-2020
5.4% a year

2020-2030
4.6% a year

Source: World Tourism Organization (UNWTO) ©
Africa: International tourist arrivals to increase by 4 million a year on average

Average increase 2010-2030
4.2 million a year

2010-2020
3.5 mn a year

2020-2030
4.9 mn a year

Africa: International tourist arrivals to grow from 50 mn to 134 mn

Source: World Tourism Organization (UNWTO) ©
Fastest growth for all African subregions

Africa by subregion
Africa, International tourism by means of transport

Africa: transport over surface to grow somewhat faster than by air

Share in the world
Inbound tourism by region of destination

International Tourist Arrivals, share, %

Europe
Asia and the Pacific
Americas
Middle East
Africa

source: World Tourism Organization (UNWTO) ©

Africa inbound tourism market share going up due to faster growth

African outbound tourism also growing at a faster pace

Outbound tourism by region of origin

International Tourist Arrivals, share, %

Europe
Asia and the Pacific
Americas
Middle East
Africa

source: World Tourism Organization (UNWTO) ©
Africa: intraregional arrivals grow faster, so share from other regions decreasing

Tourism Towards 2030 in one page

- *Tourism Towards 2030* shows that there is still a great potential for further expansion in coming decades.

- Emerging as well as established destinations can benefit from this trend and opportunity, provided they shape the adequate conditions and policies with regard to business environment, infrastructure, facilitation, marketing and human resources.

- Along with opportunities, challenges also arise in maximising social and economic benefits and minimising negative impacts.

Long-term tourism growth pattern: more moderate, sustainable and inclusive.
Africa towards 2030

4.2 million additional international tourist arrivals on average a year of the 43 million worldwide

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**Africa: how to make it possible**

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>- natural resources</td>
<td>- infrastructure development</td>
</tr>
<tr>
<td>- cultural resources</td>
<td>- planning &amp; product dev’ment</td>
</tr>
<tr>
<td>- human resources</td>
<td>- attracting investment</td>
</tr>
<tr>
<td>- authenticity and newness</td>
<td>- travel facilitation</td>
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<tr>
<td>- price competitiveness</td>
<td>- safety and security</td>
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<tr>
<td>- dynamism</td>
<td>- health and hygiene</td>
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<td></td>
<td>- quality</td>
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<td>- marketing and promotion</td>
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<td>- e-marketing</td>
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<td>- image building and branding</td>
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</tbody>
</table>
Visa facilitation: stimulating economic growth and development through tourism

Visa Facilitation - Situation

- Visas provide essential functions
  - Immigration Control
  - Security
  - Limitation of duration of stay and activities
  - Application of measures of reciprocity
- However … visas also act as a constraint to international travel and its economic benefits
Visa Facilitation - Situation 2012

- on average 2/3 of the world’s population needed to obtain a visa prior to departure
- 18% of the world’s population was able to enter a destination without a visa
- 17% of the world’s population could receive a visa on arrival
- 2% of the population was allowed to apply for an eVisa

- South-East Asian, East African and Caribbean destinations are among the most open destinations
- Central African and North American destinations are the most restrictive
- Between 2010 and 2012, 43 destinations significantly facilitated the visa process for citizens of 20 or more countries by changing their visa policies positively
- The most popular facilitation measure: ‘Visa on arrival’

Visa Facilitation - Openness Index
Situation 2012

% of world population that do not need visa to enter country*
- 0 - 10
- 11 - 23
- 24 - 39
- 40 - 69
- 70 - 100

* visa upon arrival weighted 0.5, e-visa 0.7
International tourism receipts relative to population, 2012

Sub-regions of destinations by % of world population affected by visa policies, 2012
The Least Restrictive Destinations

This Index indicates to what extent a destination is facilitating tourism.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>Openness score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cook Islands</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>Dominica</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>Micronesia</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>Niue</td>
<td>100</td>
</tr>
<tr>
<td>5</td>
<td>Tuvalu</td>
<td>100</td>
</tr>
<tr>
<td>6</td>
<td>Haiti</td>
<td>99</td>
</tr>
<tr>
<td>7</td>
<td>Macao (China)</td>
<td>84</td>
</tr>
<tr>
<td>8</td>
<td>Hong Kong (China)</td>
<td>80</td>
</tr>
<tr>
<td>9</td>
<td>Nicaragua</td>
<td>79</td>
</tr>
<tr>
<td>10</td>
<td>Turks &amp; Caicos Islands</td>
<td>79</td>
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<tr>
<td>11</td>
<td>Fiji</td>
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<td>12</td>
<td>Georgia</td>
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<tr>
<td>13</td>
<td>Guyana</td>
<td>76</td>
</tr>
<tr>
<td>14</td>
<td>St Vincent &amp; Grenadines</td>
<td>76</td>
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<tr>
<td>15</td>
<td>Vanuatu</td>
<td>75</td>
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<td>16</td>
<td>Kyrgyzstan</td>
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<td>17</td>
<td>Gambia</td>
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<tr>
<td>18</td>
<td>Vietnam</td>
<td>74</td>
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<tr>
<td>19</td>
<td>Rwanda</td>
<td>73</td>
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<tr>
<td>20</td>
<td>Mali</td>
<td>72</td>
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<tr>
<td>21</td>
<td>Cape Verde</td>
<td>71</td>
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<tr>
<td>22</td>
<td>Nepal</td>
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<tr>
<td>23</td>
<td>Togo</td>
<td>71</td>
</tr>
<tr>
<td>24</td>
<td>Uganda</td>
<td>71</td>
</tr>
<tr>
<td>25</td>
<td>Mozambique</td>
<td>71</td>
</tr>
</tbody>
</table>

Most progress between 2010 and 2012 in regard to improved visa procedures was made by:

1. Micronesia
2. Niue
3. Palau
4. São Tomé e Príncipe
5. Tuvalu
6. Djibouti
7. Haiti
8. Mozambique
9. Rwanda
10. Burundi
11. Togo
12. Cape Verde
13. Mali
14. Kyrgyzstan
15. Uganda
16. Guyana
17. United Arab Emirates
18. Laos
19. Kenya
20. Ecuador

Progress made in recent years
Impacts of Visa Facilitation

Joint research by the UNWTO and WTTC presented to the 4th T20 Ministers Meeting in May 2012 (Tourism Ministers of the G20) shows that improving visa processes could generate an extra US$ 206 billion in tourism receipts and create as many as 5 million additional jobs by 2050 in the G20 economies.


Recommendations

Negotiate bi- or multilateral exemptions of visas
• If you haven’t done so yet, start with your neighbours to stimulate intra-regional travel

Improve delivery of information
• Availability, reliability and usefulness of information – regularly updated, multiple languages, availability online including forms

Facilitate processes to obtain visas
• Simplify and streamline procedure as much as possible and address/decrease temporarily bottlenecks such as personal interviews, needed documents, wait times, etc.
Recommendations

Institute visa upon arrival or eVisa programmes
- If exempting from entry visa is not possible

Differentiated treatment to facilitate tourist travel
- For means of transportation (e.g. cruise ship passengers) or specified geographical areas or ports of entries, or in case of events

Establish regional agreements
- To move freely between member countries once admitted by one of the member states

Tourism in the global agenda

- **G20** recognizes for the first time Travel and Tourism as a vehicle for job creation, economic growth and development, and commits to work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth. *(G20 Declaration - June 2012)*

- **Rio+20** recognizes the significant contribution of sustainable tourism to the three dimensions of sustainable development, its linkages to other sectors and its capacity to create decent jobs and trade opportunities.
Where to find information prepared by UNWTO?

www.unwto.org/facts  =>  Facts & Figures

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Thank you very much for your attention!

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Programme Manager,
Tourism Trends and Marketing Strategies

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