



| ICAO UNITING AVIATION

59th Meeting of the UNWTO Commission for Africa and High-level Meeting on Chinese Outbound Tourism to Africa

20 April 2017 – Addis-Ababa, Ethiopia

**Introductory Presentation:
Chinese Outbound Tourism to Africa**

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Civil Aviation Organization





ICAO ECONOMIC DEVELOPMENT

NO COUNTRY LEFT BEHIND



Aviation
& Tourism



Hand in Hand for Sustainability

Air transport and tourism are major contributors to global economic prosperity. In 2012, more than one billion tourists crossed international borders, more than half by air. The total number of international tourists, which includes both business and leisure travellers, is expected to reach 1.8 billion by 2020. This will further increase the demand for air transport services, with overall annual aircraft departures forecast to grow from today's 32 million to 60 million in 2020.

The symbiotic relationship between aviation and tourism is reflected at the global level in the respective mandates of the International Civil Aviation Organization (ICAO) and the World Tourism Organization (UNWTO). While ICAO sets standards and policies for aviation safety, security, efficiency, environmental protection and the economic development of air transport, UNWTO promotes tourism as a driver of economic growth and

sustainable development, offering leadership and support to the sector in advancing knowledge and tourism policies worldwide.

Accordingly, ICAO and UNWTO have decided to strengthen their collaborative efforts towards building a more sustainable future in all of the three pillars of the United Nations definition of sustainability – social, environmental and economic – and to position air transport and tourism as strategically interrelated sectors that benefit the global society they both serve.

To that end, the two Organizations – hereinafter referred to as “we” – affirm their common understanding and shared intent through the following Joint Statement on Aviation and Tourism, symbolically signed on the occasion of the official opening of the ICAO South Worldwide Air Transport Conference, convened under the theme of “Sustainability of Air Transport”.

A solid track record

ICAO and UNWTO are designated inter-governmental bodies responsible for aviation and tourism respectively. As sister agencies within the United Nations system, we together contribute to securing the social, economic and environmental pillars of sustainability.

In 1978, we entered into a Working Arrangement for consulting each other on questions of common interest, so as to ensure optimal coordination of activities and avoid duplication of efforts.

In 2010, we signed a Memorandum of Co-operation to strengthen collaboration in several areas of strategic importance to air transport and tourism:

- Security and facilitation for travellers.
- Promotion of investments in aviation infrastructure and safety.
- Crisis management.
- Health issues, including those pertaining to the spread of communicable diseases through travel.
- Sustainable development, including environmental protection, mitigation of, and adaptation to, climate change.
- Liberalization of international air transport.
- Economic studies on aviation and tourism, and their impacts on the economy.

A firm intention

Looking ahead, we intend to further optimize the benefits of aviation and tourism through:

- Maximizing synergies between air transport and tourism, while finding ways to continually enhance collaborative endeavours.
- Cooperating for the modernization of the air transport regulatory framework.
- Enhancing air transport connectivity further through cooperation:
 - Regarding visa and other travel document formalities and issuance, including the simplification of visa processing and the development of multi-State regional visas and e-visas.
 - For the improvement of air passenger flow management at airports.
 - For the implementation of the Essential Service and Tourism Development Route (ESTDR) concept.
- Contributing to the emergence of globally convergent rules on the protection of passengers, tourists and tourism service providers, within our respective mandates and the framework of existing or future international bilateral or multilateral agreements.
- Contributing to the reduction of greenhouse gas emissions from aviation and tourism.
- Giving due consideration to the particular importance of air transport for tourism development in long-haul destinations and landlocked or island countries.
- Assessing the impact of taxes, charges and other levies on aviation and tourism, and thus on global economic growth and jobs.

Working together on common issues will more effectively position aviation and tourism as leaders in the pursuit of sustainable development.

Signed in Montreal on 18 March 2013:

ICAO:

Mr. Benjamin, Secretary General

UNWTO:

Mr. Taleb Rifai, Secretary General

Air transport and tourism partnering for sustainability in 2013

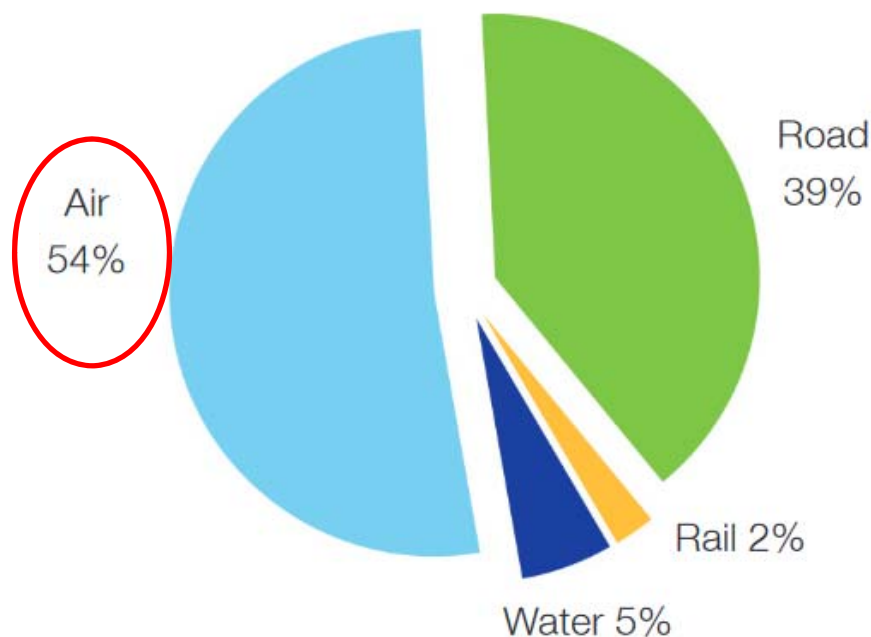
ICAO/UNWTO Joint Statement

**Air travellers represent 52% of
international tourists**

Visa facilitation & border control
(proposed by UNWTO),
consumer issues, environmental
protection, data/forecasts etc.



More than half of international tourists arrive by air



- Tourism expansion relies heavily on air transport, providing substantial economic benefits for anyone involved in the value chain of tourism
- Separate sectorial policies on air transport and tourism result in a fundamental, and too often even conflicting disconnect which constitutes a severe constraint on the development of travel and tourism

Inbound tourism by mode of transport in 2014



ICAO/UNWTO Cooperation

- *Special Joint Statement between ICAO and UNWTO, signed on 18 March 2013*
- *Luanda Declaration on Tourism and Air Transport Connectivity of 29 April 2014,*
- *Medellin Statement on Tourism and Air Transport for Development of 15 Sept. 2015*



Medellin Statement on Tourism and Air Transport for Development

- *Affirming* that the formulation of policies to increase air connectivity is a key catalyst in promoting sustainable tourism and economic development,
- *Cognizant* of the increasing need for reliable and efficient and affordable transport linkages between source markets and destinations to foster international and interregional trade, tourism and economic cooperation,
- *Affirming* the need to protect consumers of tourism and air transport products and services, and the desirability of fostering convergence and compatibility in consumer protection regimes worldwide,



Medellin Statement on Tourism and Air Transport for Development

1. Tourism and air transport are key sectors for sustainable and resilient growth and development, particularly for Least Developed Countries (LDCs), Landlocked Developing Countries (LLDCs) and Small Island Developing States (SIDS).
3. Tourism and air transport development must contribute to building economic links that bridge the gaps between developed and developing countries by enhancing cooperation, especially in infrastructure development, human resources, promotion and marketing.



Medellin Statement on Tourism and Air Transport for Development

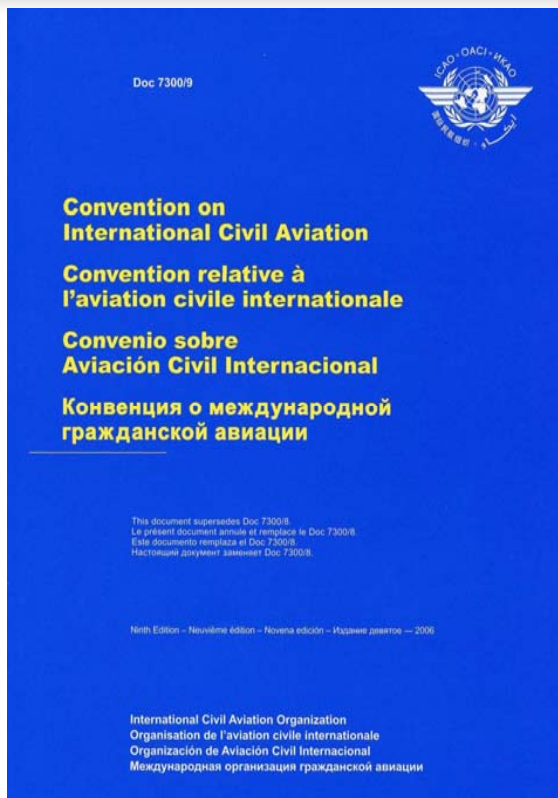
8. Governments should seek convergence and compatibility when formulating consumer protection regimes, giving due regard to relevant international instruments, including the ICAO core principles on consumer protection.

12. Travel facilitation is of great importance for the development of present-day tourism and Member States should pursue their efforts to implement the provisions of previous declarations and recommendations, especially those encouraging travel facilitation and, when appropriate, lend their support to UNWTO and ICAO in this regard.



Medellin Statement on Tourism and Air Transport for Development

- 13. Facilitation, wherever feasible, of travel formalities and procedures in respect of entry and exit points, customs, currency, safety and security as well as health regulations, is crucial in order for the tourism and air transport sectors to sustain their resilient growth and yield their development potential.
- 14. Improving transport conditions, especially air transport, should be ensured by vigorously promoting the introduction of measures that enable seamless, safe and secure domestic and international travel, such as the *ICAO Traveller Identification Programme* (ICAO TRIP) as well as INTERPOL's *Stolen and Lost Travel Documents Database* (SLTD), so as to maximize the holistic approach to identification management at borders while ensuring travellers' safety and the resilience of tourism development.



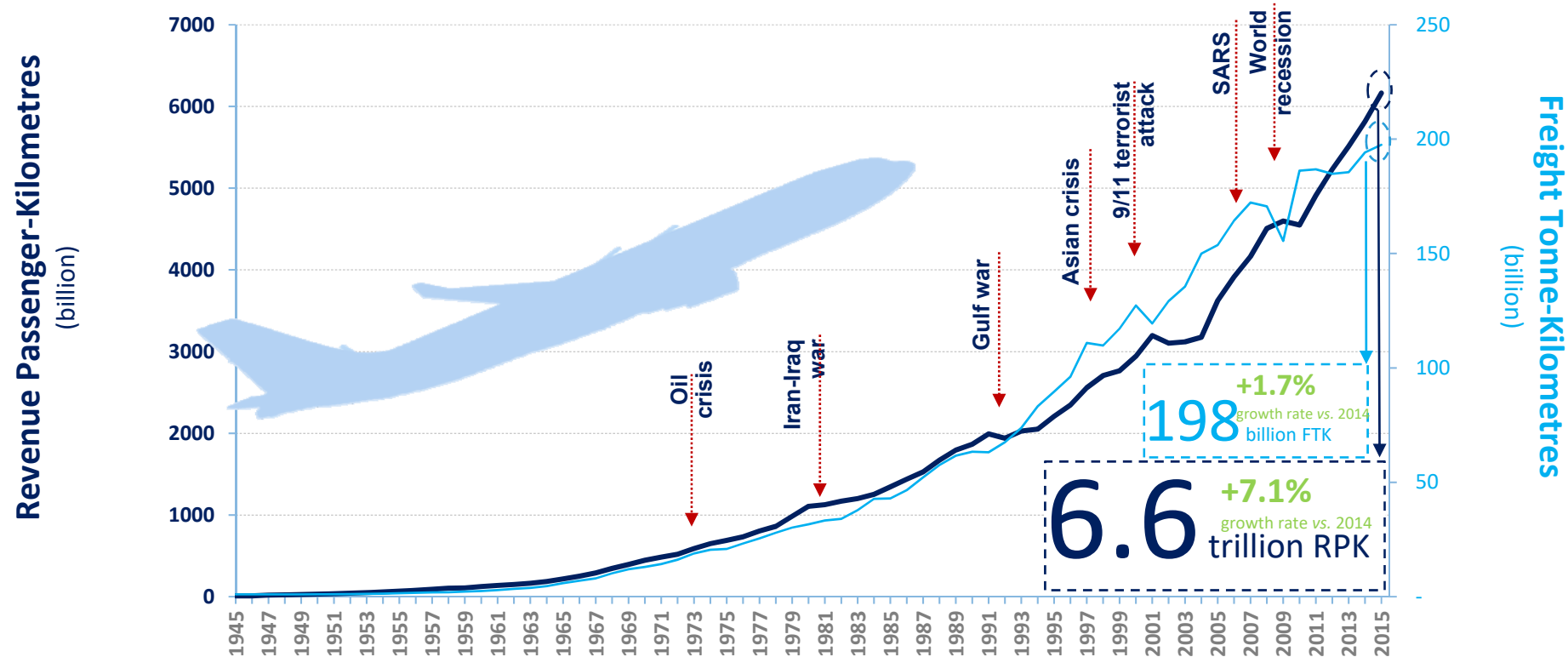
Preamble

.....

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;



Growth of air transport





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The size of the industry 2015

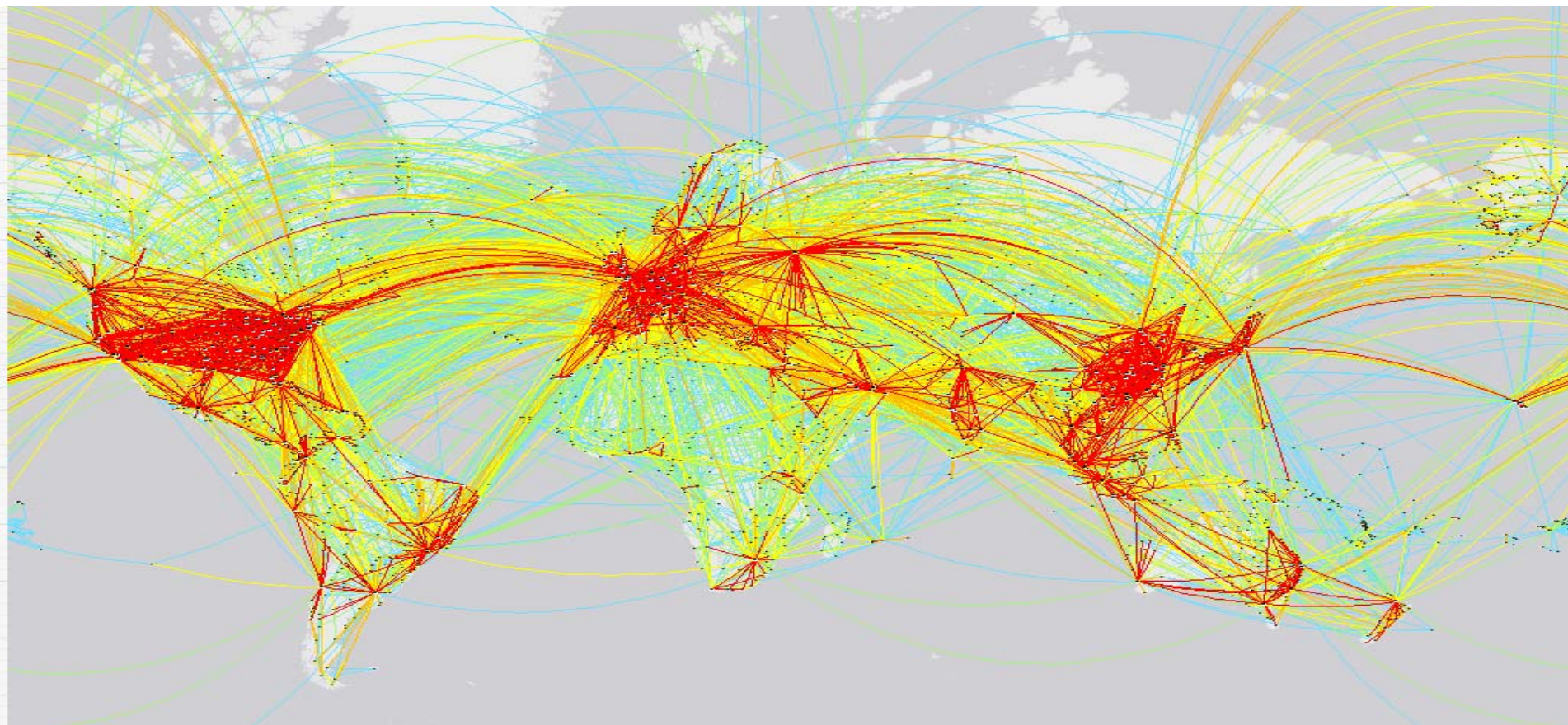
- 3.5 billion passengers
- 34 million aircraft departures
- 51 million tonnes of freight
- Over 1 400 scheduled airlines
- More than 27 000 aircraft
- More than 4 130 airports
- 173 air navigation centres

Traffic is for scheduled services



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Air route network 2015



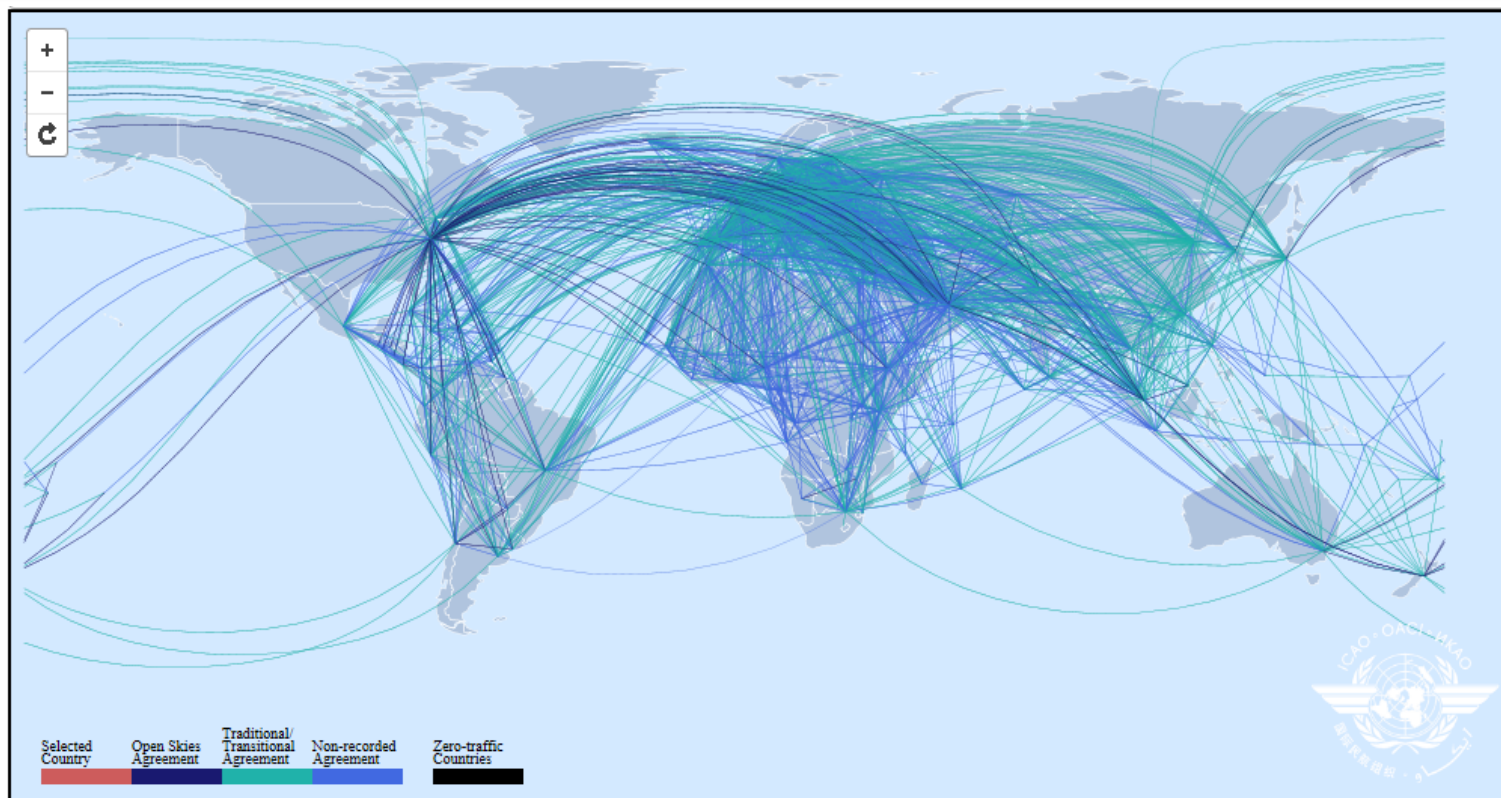
Source: ICAO



ICAO

ECONOMIC DEVELOPMENT

Web of bilateral air services agreements



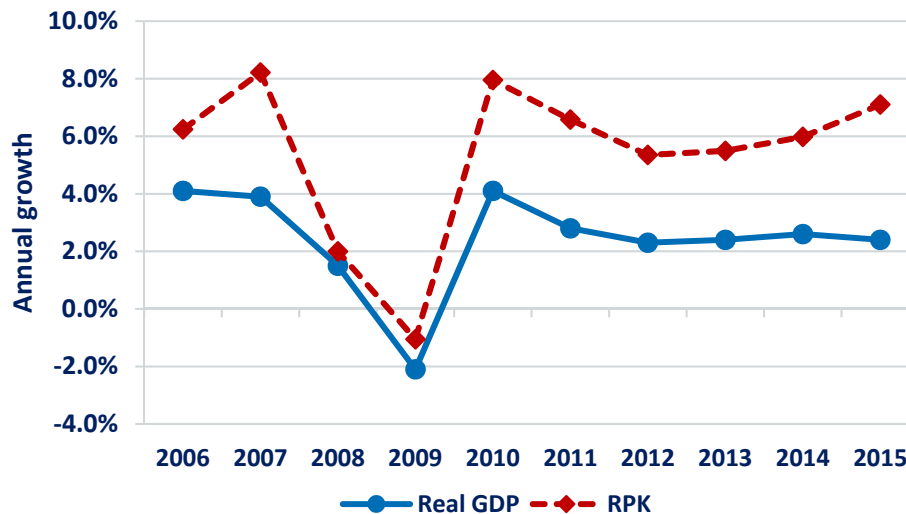
2015 data

Source: ICAO WASA Map Tool



Growth despite constraining factors

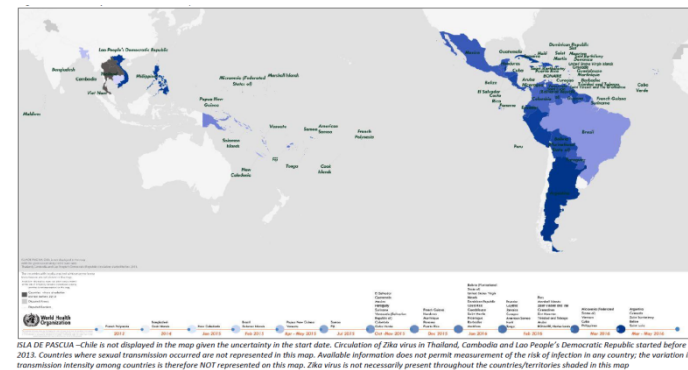
Real GDP Growth



The world economy recorded a real GDP growth of 2.4% in 2015 and total passenger-kilometres increased by 7.1%

- Brussels airport attacks (security concern)
- Zika outbreak (health concern)

Global spread of Zika virus 2013-2016



Source: WHO



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Economic benefits of aviation in 2015

Direct economic contribution of the aviation sector

10.0 million

Direct jobs supported by aviation worldwide

\$718 billion

Direct Global economic impact

Direct, indirect, induced and tourism economic contribution of the aviation sector

63.5 million

Jobs supported by aviation worldwide

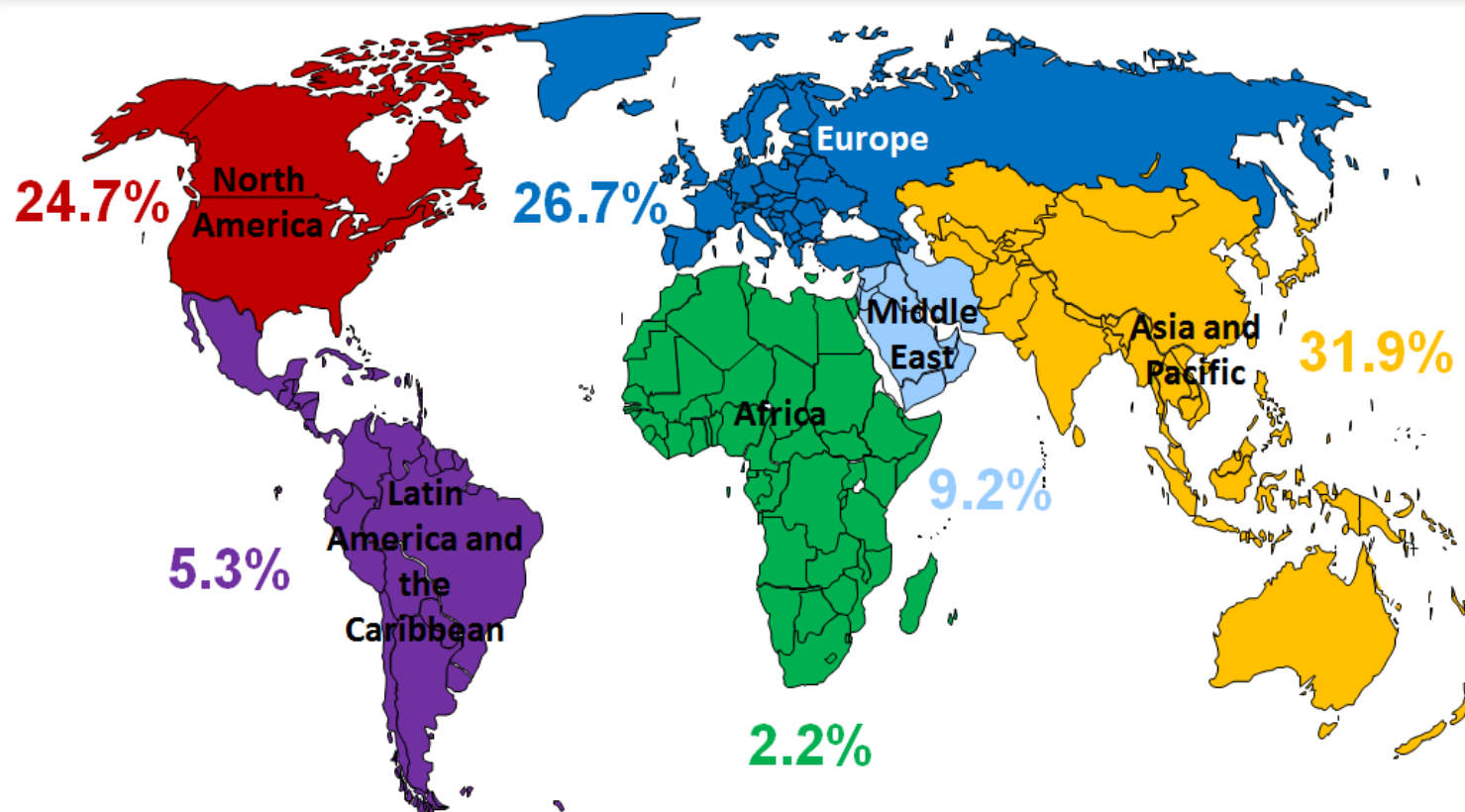
\$2.7 trillion

Global economic impact

In collaboration with the United Nations, States and international organizations, ICAO is developing a universally-accepted methodology to measure aviation's gross domestic product (GDP) relative to overall economic activity, to better showcase the economic benefits of aviation to the public.

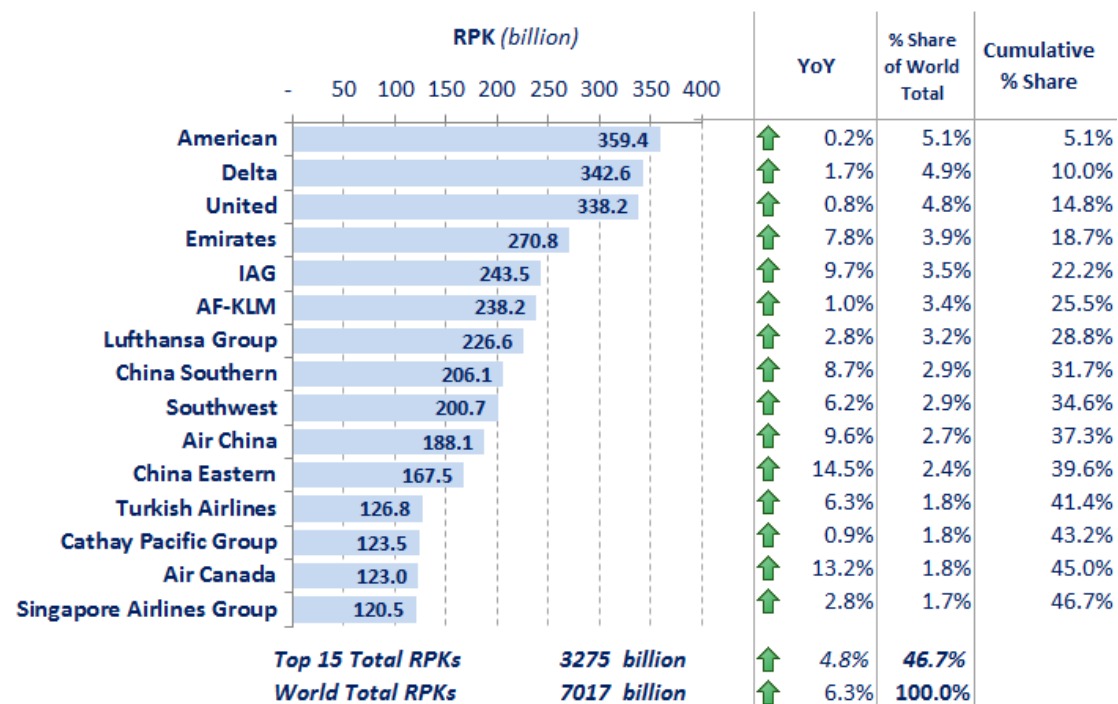


Share of Revenue Passenger-Kilometres by region in 2015





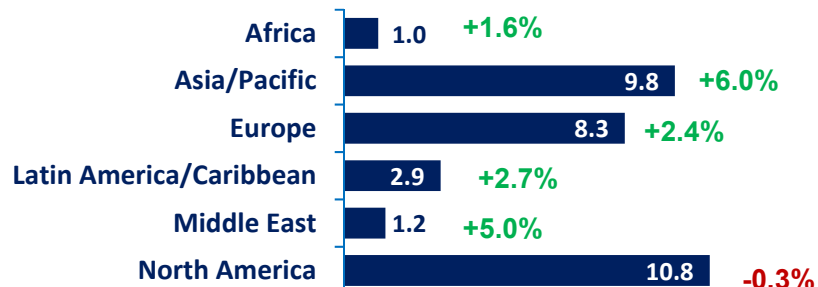
Top 15 Airline groups in 2016 passenger traffic



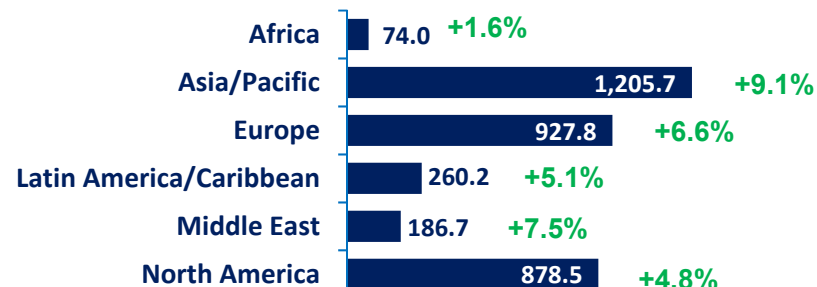


Air transport by region in 2015

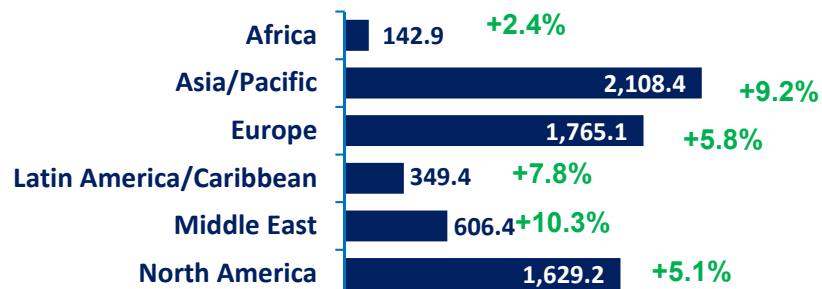
Aircraft departures (million)



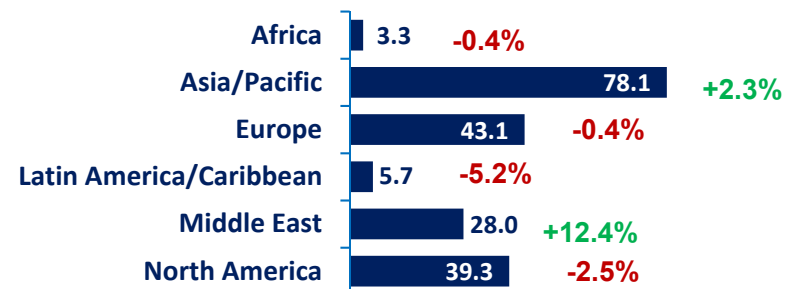
Passengers carried (million)



Revenue Passenger-Kilometres (billion)

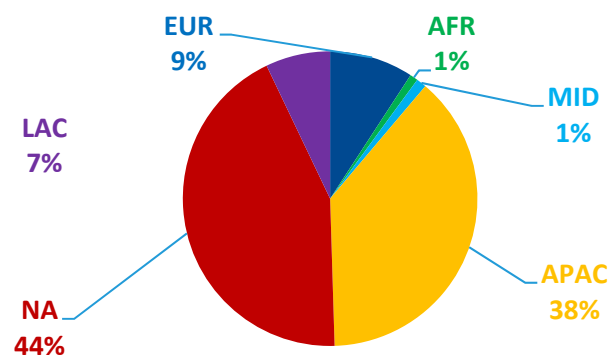
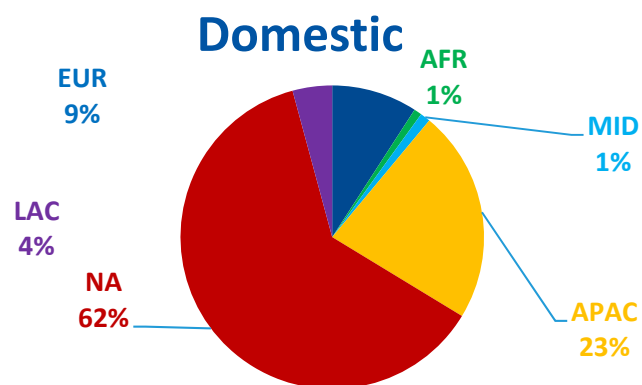


Freight Tonne-Kilometres (billion)





Passenger traffic distribution

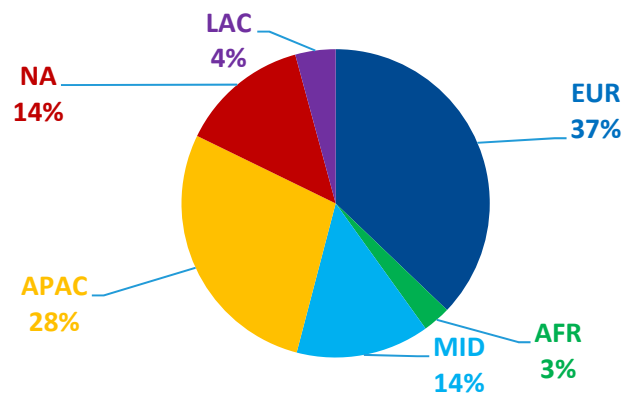
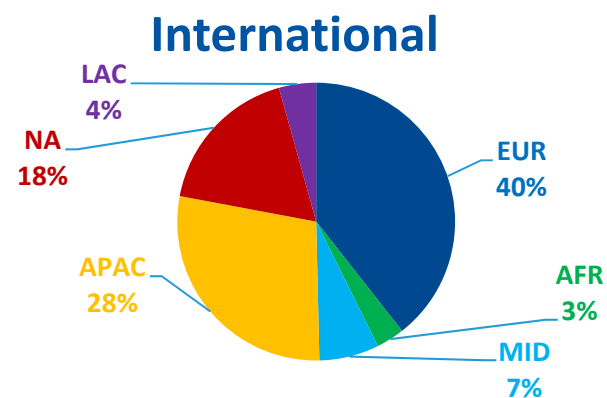


2005

Domestic 41%
International 59%

2015

Domestic 37%
International 63%





Top 25 airports in 2016 passenger traffic

Rank No.	City and airport code	Passenger (thousand)		2016/2015 (%)	Movements (thousand)		2016/2015 (%)
		2016	2015		2016	2015	
1	Atlanta GA (ATL)	104,172	101,491	2.6	898	882	1.8
2	Beijing (PEK)	94,393	89,939	5.0	606	590	2.7
3	Dubai (DXB)	83,654	78,015	7.2	420	407	3.2
4	Los Angeles CA (LAX)	80,922	74,937	8.0	697	656	6.3
5	Tokyo (HND)	79,700	75,573	5.5	446	439	1.6
6	Chicago IL (ORD)	78,327	76,950	1.8	868	875	-0.8
7	London (LHR)	75,715	74,990	1.0	475	474	0.2
8	Hong Kong (HKG)	70,314	68,488	2.7	422	406	3.9
9	Shanghai (PVG)	66,002	60,098	9.8	480	449	6.9
10	Paris (CDG)	65,933	65,767	0.3	479	476	0.6
11	Dallas/Fort Worth TX (DFW)	65,671	64,174	2.3	673	681	-1.2
12	Amsterdam (AMS)	63,626	58,285	9.2	496	466	6.4
13	Frankfurt (FRA)	60,787	61,032	-0.4	463	468	-1.1
14	Istanbul (IST)	60,249	61,323	-1.8	466	447	4.3
15	Guangzhou (CAN)	59,732	55,202	8.2	435	410	6.1
16	New York NY (JFK)	58,813	56,827	3.5	448	439	2.1
17	Singapore (SIN)	58,698	55,449	5.9	365	351	4.0
18	Denver CO (DEN)	58,267	54,015	7.9	566	548	3.3
19	Incheon (ICN)	57,850	49,413	17.1	343	308	11.4
20	Bangkok (BKK)	55,892	52,384	6.7	335	320	4.6
21	New Delhi (DEL)	55,631	45,982	21.0	407	349	16.6
22	Jakarta (CGK)	54,970	54,054	1.7	385	380	1.3
23	San Francisco CA (SFO)	53,099	50,058	6.1	450	430	4.7
24	Kuala Lumpur (KUL)	52,640	48,929	7.6	356	353	0.8
25	Madrid (MAD)	50,398	46,780	7.7	378	367	3.0

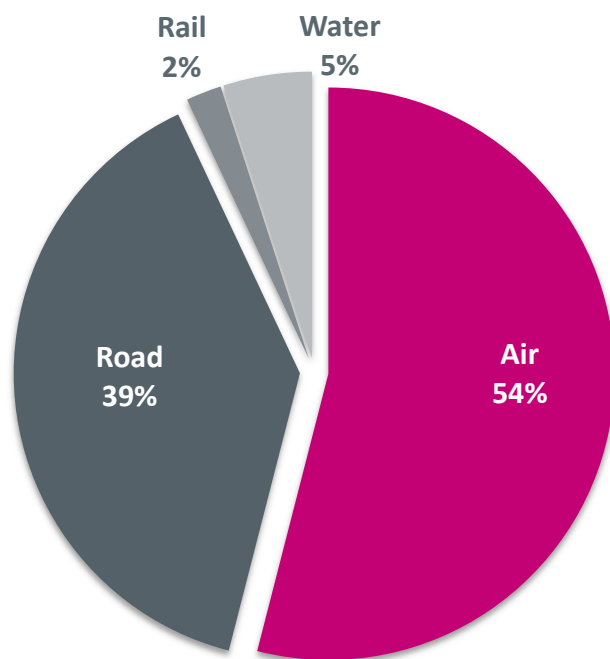
Source: ACI preliminary results



Top 25 airports in 2016 cargo traffic

Rank No.	City and airport code	Freight tonnes	2016/2015 (%)
		2016	
1	Hong Kong (HKG)	4,521,520	+3.2%
2	Memphis TN (MEM)	4,312,884	+0.6%
3	Shanghai (PVG)	3,352,002	+5.4%
4	Incheon (ICN)	2,602,679	+4.5%
5	Dubai (DXB)	2,592,454	+3.5%
6	Anchorage AK (ANC)	2,542,526	-3.4%
7	Louisville KY (SDF)	2,340,553	+3.4%
8	Tokyo (NRT)	2,130,848	+2.2%
9	Taipei (TPE)	2,081,043	+3.8%
10	Frankfurt (FRA)	2,029,058	+1.8%
11	Miami FL (MIA)	1,977,881	+0.4%
12	Singapore (SIN)	1,969,400	+6.3%
13	Paris (CDG)	1,952,935	+2.7%
14	Beijing (PEK)	1,928,179	+2.0%
15	Los Angeles CA (LAX)	1,903,155	+2.8%
16	Doha (DOH)	1,741,586	+20.7%
17	Chicago IL (ORD)	1,723,001	-1.9%
18	Amsterdam (AMS)	1,662,282	+2.6%
19	London (LHR)	1,541,202	+3.0%
20	Guangzhou (CAN)	1,516,320	+9.1%
21	Bangkok (BKK)	1,305,548	+6.2%
22	New York NY (JFK)	1,179,744	-2.4%
23	Tokyo (HND)	1,137,954	+4.6%
24	Shenzhen (SZX)	1,125,985	+11.1%
25	Leipzig (LEJ)	1,047,763	+6.5%

Source: ACI preliminary results

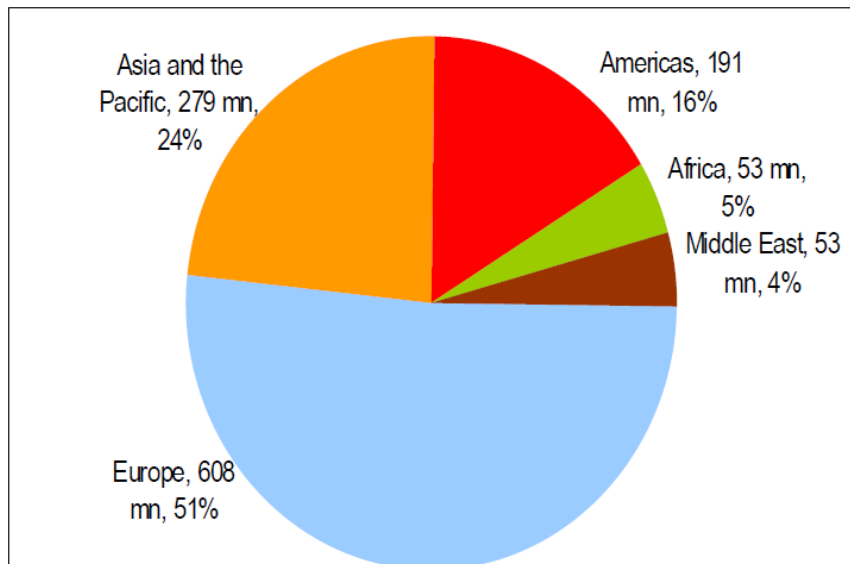


More than **half** of international inbound tourists arrived by air in 2015

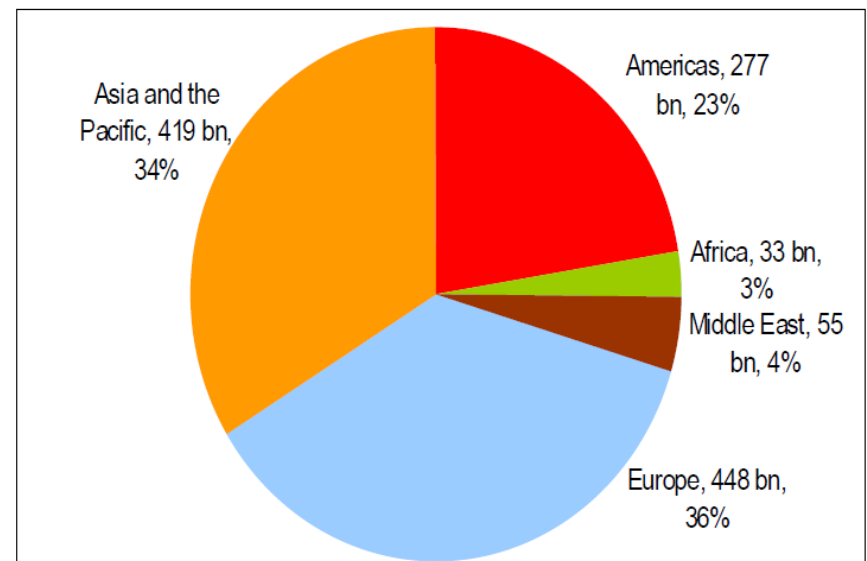
- Tourism expansion relies heavily on air transport, providing substantial economic benefits for anyone involved in the value chain of tourism
- Separate sectorial policies on air transport and tourism result in a fundamental, and too often even conflicting disconnect which constitutes a severe constraint on the development of travel and tourism



International tourists arrival - 2015



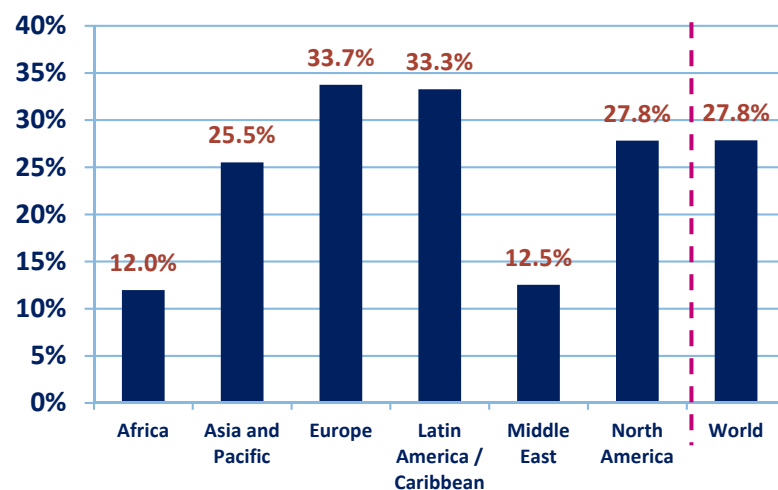
International tourism receipts – 2015 (USD)





Low-cost carriers (LCCs) stimulating traffic

Share of passengers carried by
LCCs in 2015



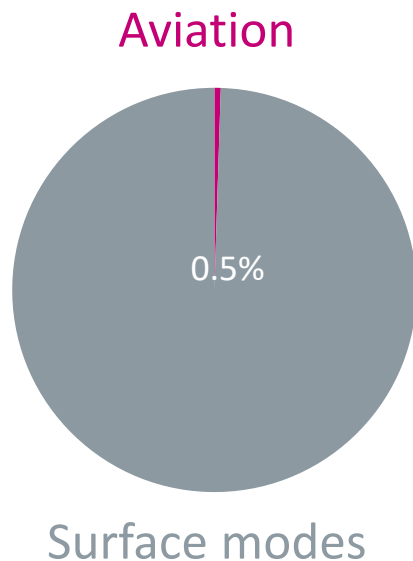
Passenger number growth for LCCs
and other carriers

	2014	2015
LCCs	9.8%	10.3%
Others	4.2%	5.5%
Total	5.7%	6.8%

LCCs growth has been consistently twice as
much as other carriers' growth

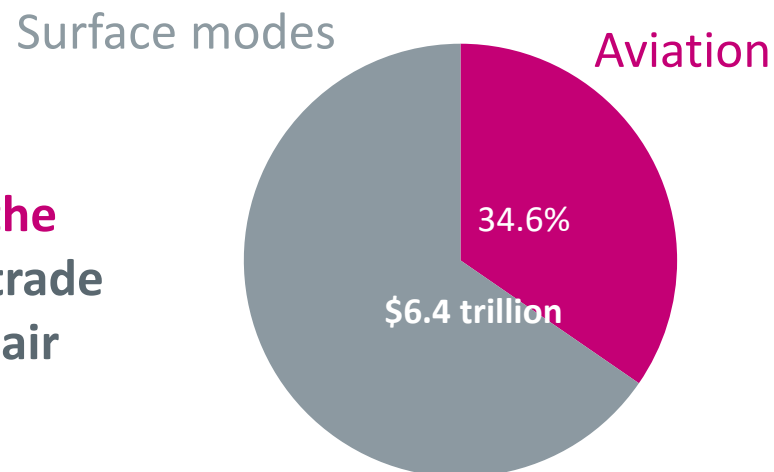


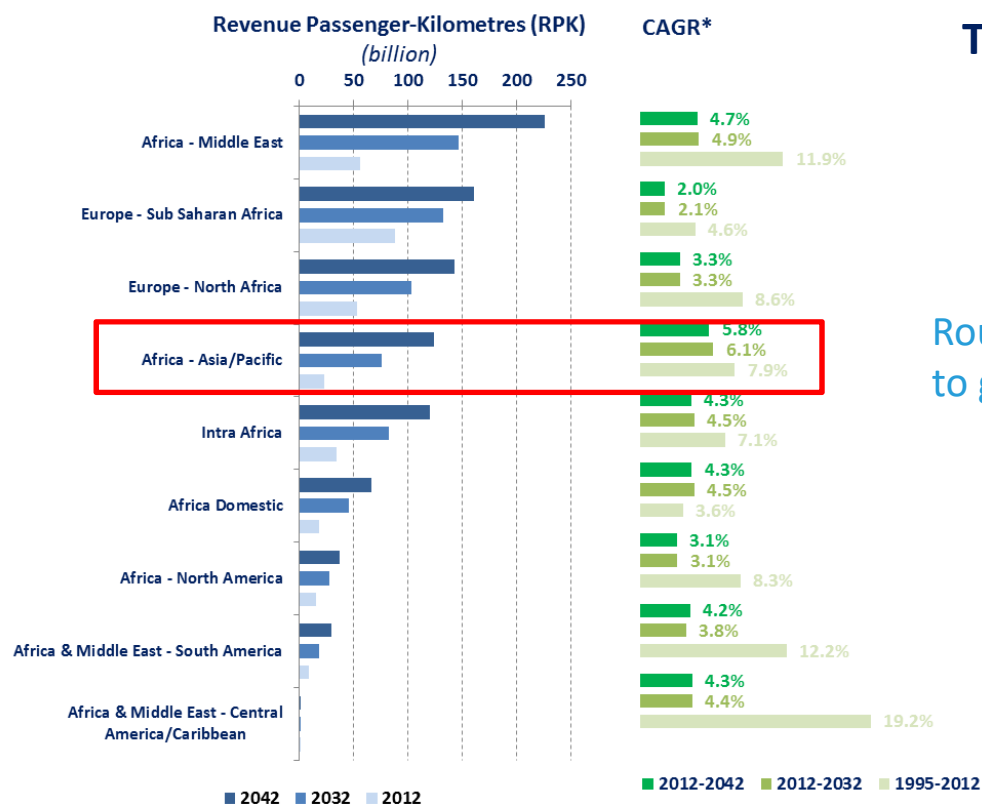
Volume of world international cargo shipment



One third of the value of world trade is shipped by air

Value of world international cargo shipment





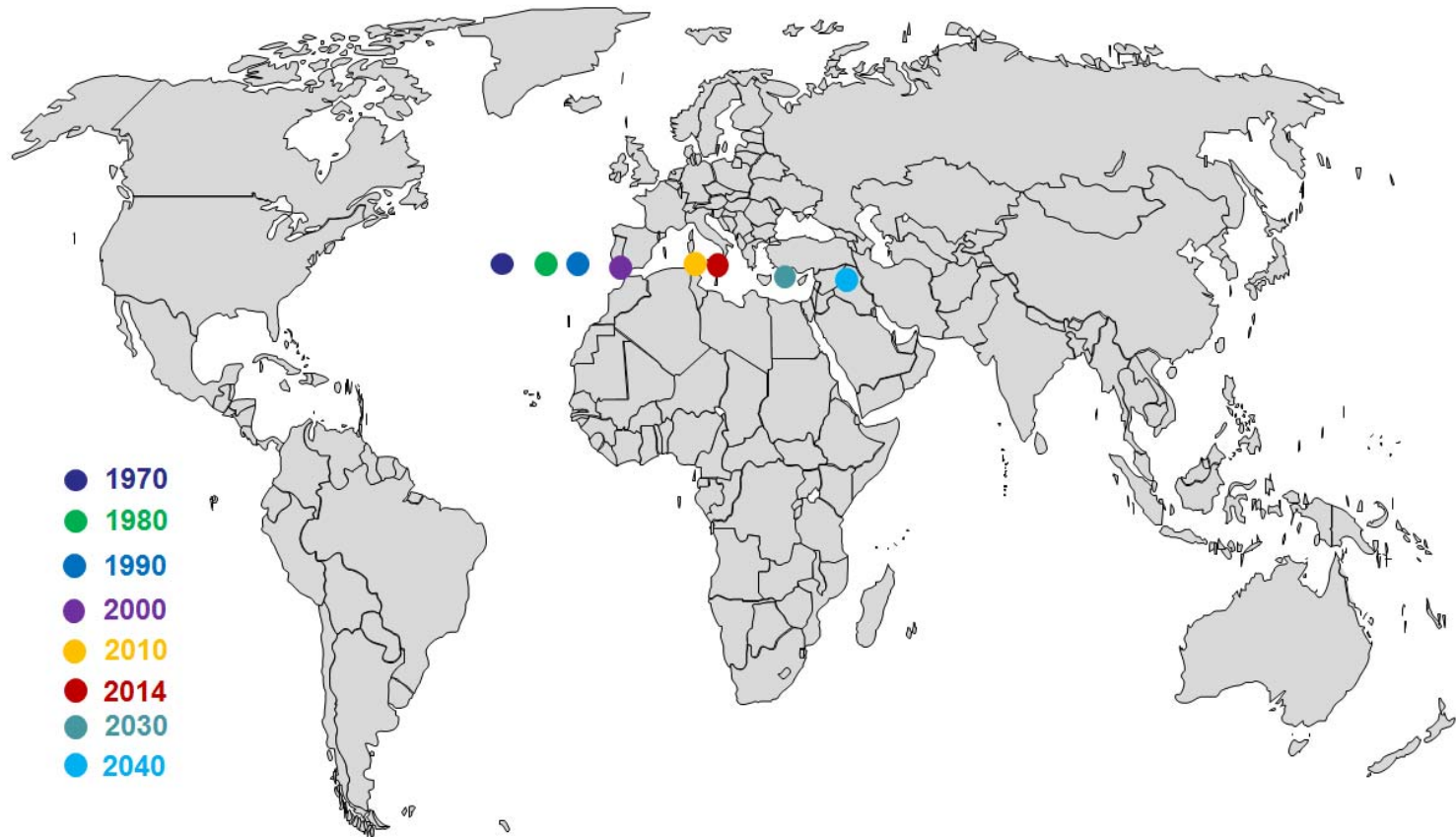
Top routes to/from Africa (2042 forecast)

Routes between Africa and Asia/Pacific are expected to grow at 5.8% annually in the next 30 years



Centre of gravity

Geographical centre
of gravity of
departing/arriving
passengers





ICAO Strategic Objectives

Safety: Enhance global civil aviation safety

Air Navigation Capacity and Efficiency: Increase capacity and improve efficiency of the global civil aviation system

Security & Facilitation: Enhance global civil aviation security and facilitation

Economic Development of Air Transport: Foster the development of a sound and economically-viable civil aviation system

Environmental Protection: Minimize the adverse environmental effects of civil aviation activities

ANB

ATB



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Air Transport Supports the UN Sustainable Development Goals (SDGs)



ICAO and the United Nations Sustainable Development Goals (SDGs)

Read more at: <http://www.icao.int/about-icao/aviation-development/Pages/SDG.aspx>

ICAO STRATEGIC OBJECTIVES

		SAFETY	CAP/EFF	SEC/FAL	ECON DEV	ENV
Goal 1	End poverty in all its forms everywhere					
Goal 2	End hunger, achieve food security and improved nutrition and promote sustainable agriculture					
Goal 3	Ensure healthy lives and promote well-being for all at all ages					
Goal 4	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all					
Goal 5	Achieve gender equality and empower all women and girls					
Goal 6	Ensure availability and sustainable management of water and sanitation for all					
Goal 7	Ensure access to affordable, reliable, sustainable and modern energy for all					
Goal 8	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all					
Goal 9	Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation					
Goal 10	Reduce inequality within and among countries					
Goal 11	Make cities and human settlements inclusive, safe, resilient and sustainable					
Goal 12	Ensure sustainable consumption and production patterns					
Goal 13	Take urgent action to combat climate change and its impacts					
Goal 14	Conserve and sustainably use the oceans, seas and marine resources for sustainable development					
Goal 15	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss					
Goal 16	Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels					
Goal 17	Strengthen the means of implementation and revitalize the global partnership for sustainable development					



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Air Transport Supports the UN Sustainable Development Goals (SDGs)

SDG Goal 8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

Encourage States to meet Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products

SDG Goal 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

Encourage States to meet Target 9.1: Develop quality, reliable, sustainable and resilient infrastructure, including regional and trans-border infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all.



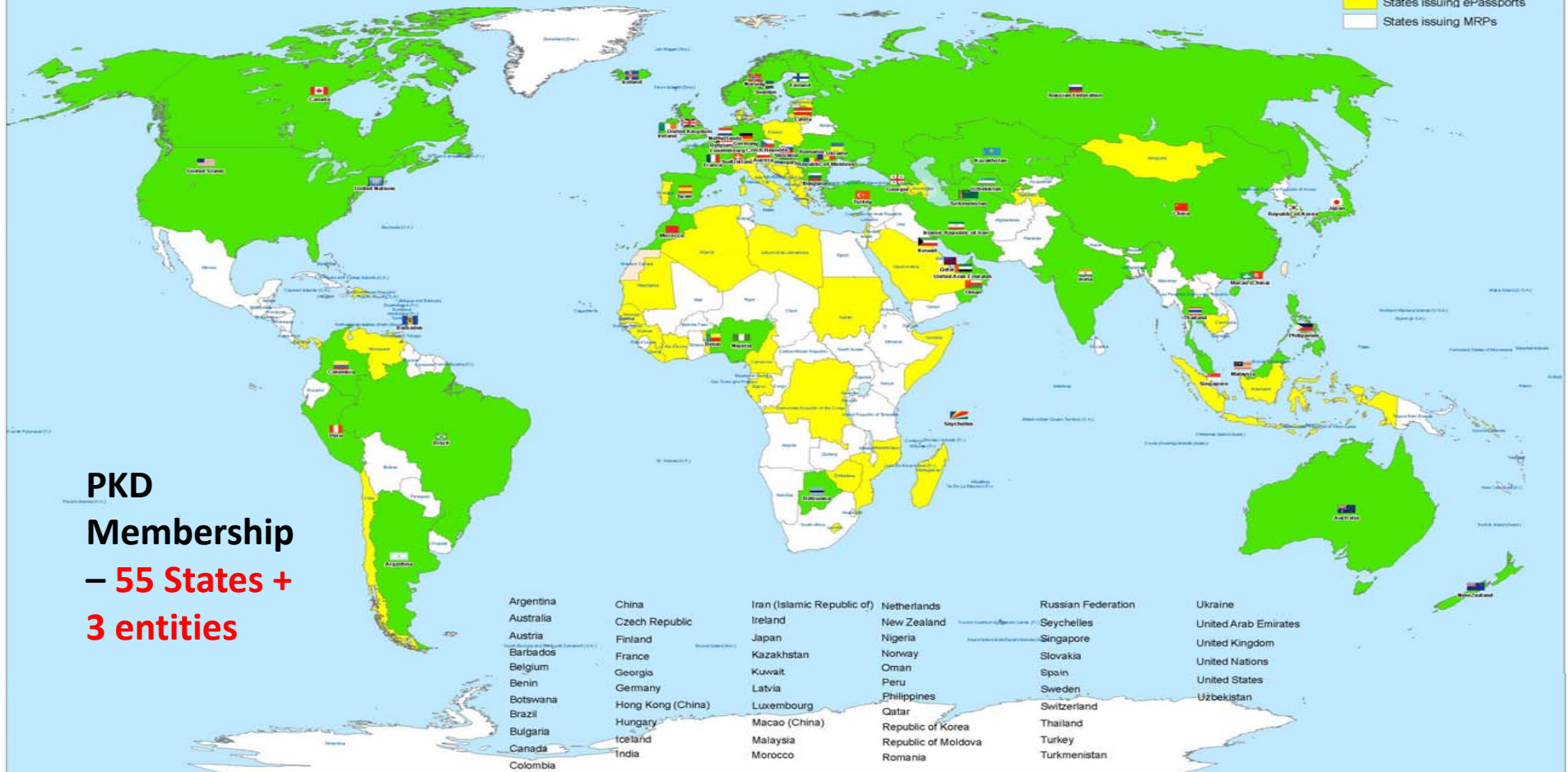
Goal 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

- 9.1 Develop quality, reliable, sustainable and resilient infrastructure, including regional and transborder infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all
- 9.1.2 Passenger and freight volumes, by mode of transport
- ICAO is the Custodian Agency of 9.1.2

58 PKD Participants and ePassports issuing States

Legend

- PKD Participants
- States issuing ePassports
- States issuing MRPs





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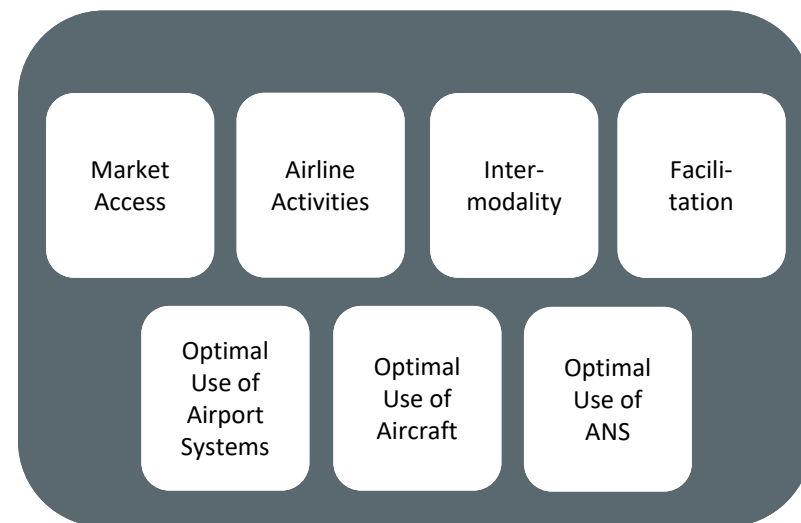
China – Africa air connectivity



Definition of Connectivity in Air Transport

Movement of passengers, mail and cargo involving the **minimum of transit points**

- which makes trip as **short** as possible
- with **optimal** user satisfaction
- at the **minimum** price possible





Connectivity brings concrete value

⇒ **main purpose** of air transport

If conditions are met:

- positive **end-user experience**
- **travel** demand
- traffic **growth**
- economic **development**

In line with

Chicago Convention Preamble

civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;

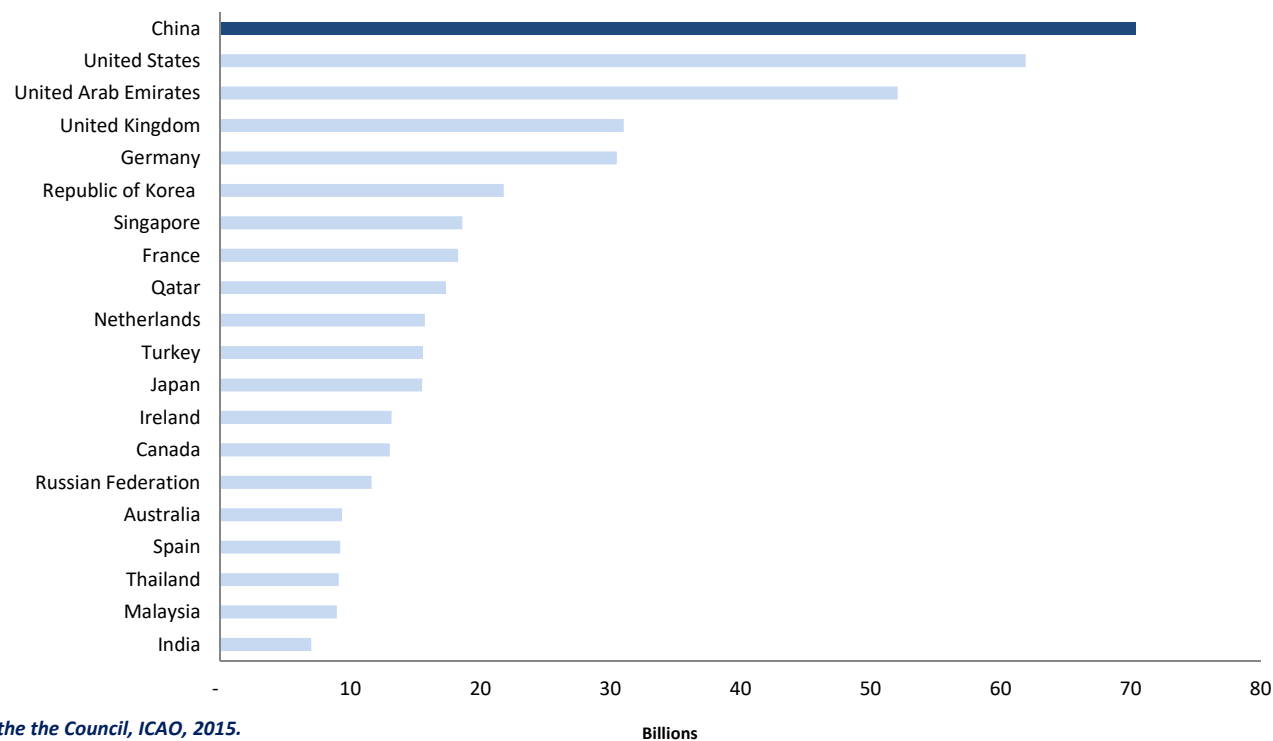
Art. 44

d) Meet the needs of the peoples of the world for safe, regular, efficient and economical air transport;



China Ranked No 1 International RTKs (2015)

Top 20 Member States by International Revenue Tonne Kilometer (RTK), 2015



Source: Annual Report of the Council, ICAO, 2015.

Note: China includes: Hong Kong SAR, Macao SAR and Taiwan, Province of China.

From Africa to China, March 2017		
Operating Carrier	Code Share Carrier	Frequencies
Air Algerie	<i>(No code sharing)</i>	22
Air China	South African Airways	13
Air Madagascar	Air Austral	5
Air Mauritius	Hong Kong Airlines, China Eastern Airlines	25
	<i>(No code sharing)</i>	4
Cathay Pacific Airways	Japan Airlines	31
China Southern Airlines	Kenya Airways	9
Egyptair	Air China	45
Ethiopian Airlines	Air China, ASKY Airlines, Shenzhen Airlines, All Nippon Airways, Asiana Airlines	121
South African Airways	Air Canada, Asiana Airlines, All Nippon Airways	31
TAAG Angola Airlines	<i>(No code sharing)</i>	7
Grand Total		313

**Air Carriers
operating to/from
Africa and China,
March 2017**

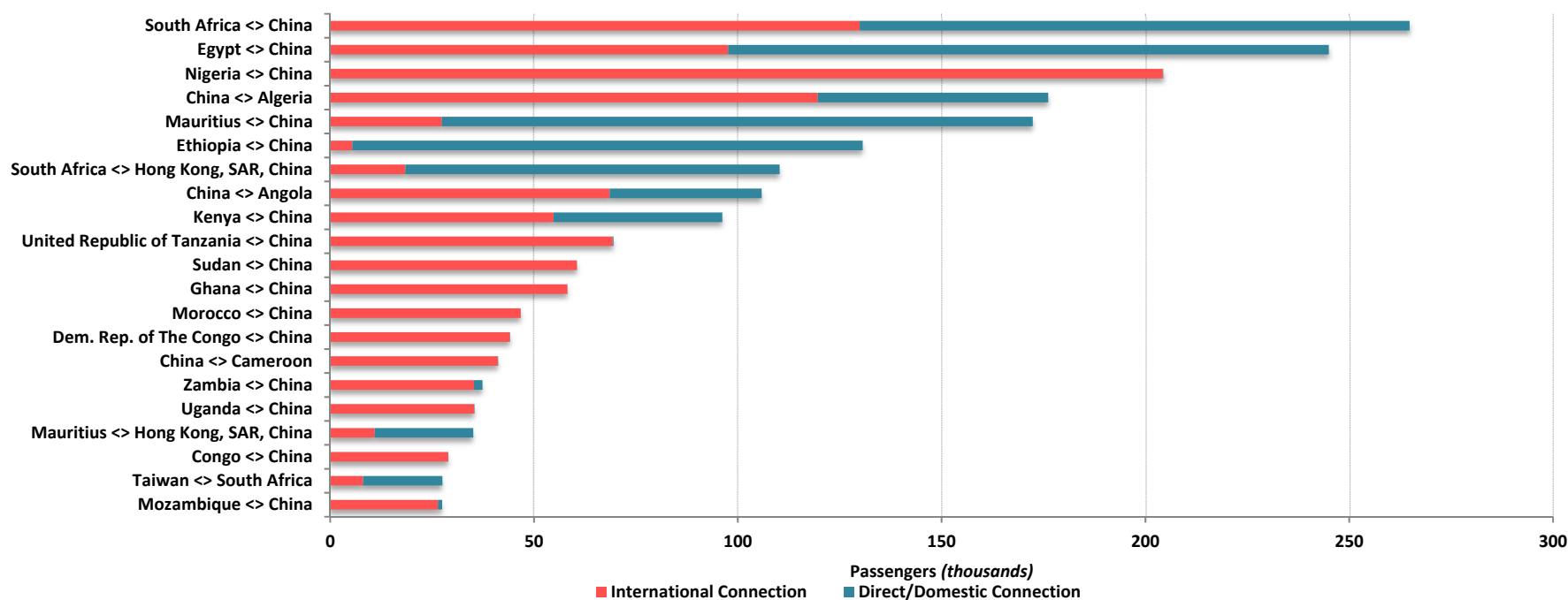
Source: OAG



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Country pairs between Africa and China- 2015

**Top 20 Country-Pairs by Passengers
(Two Ways, Number of Passengers, 2015)**



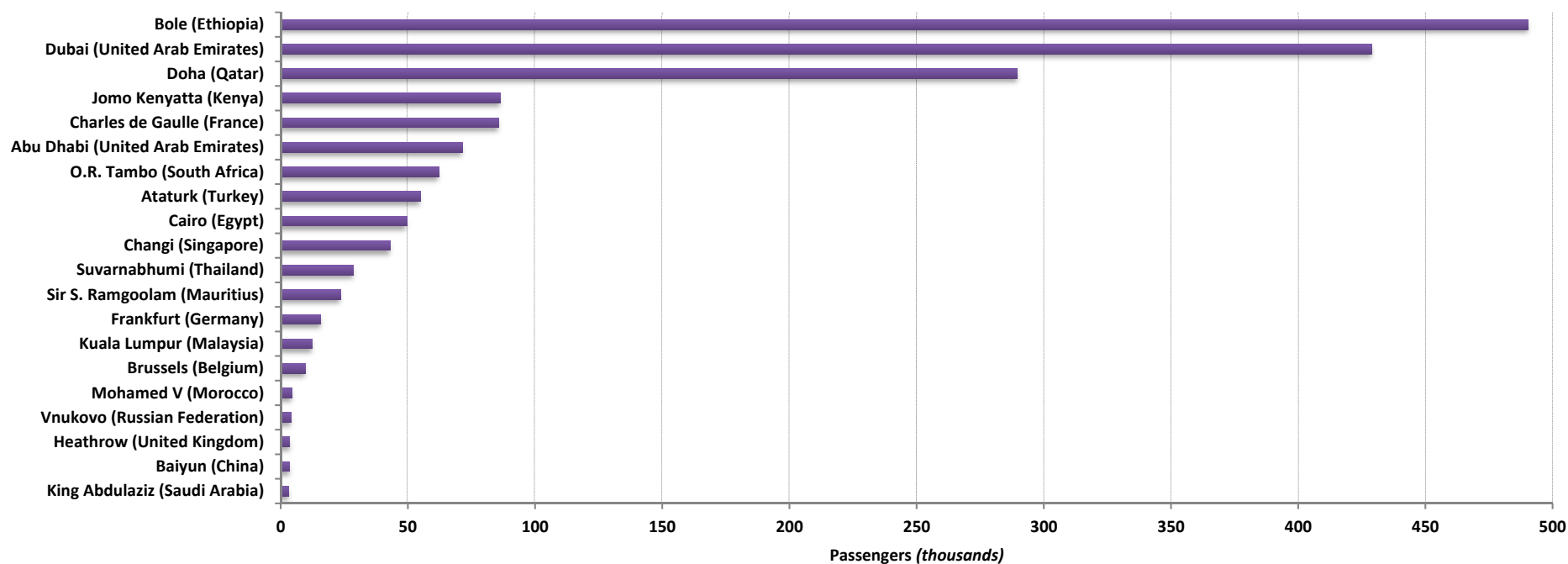
Source : ICAO-ICM Marketing Information Data Transfer (MIDT) Data Analysis



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Top 20 hubs between Africa and China-2015

Top 20 International Airports Connecting Africa <-> China Passengers (Two Ways, Number of Passengers, 2015)

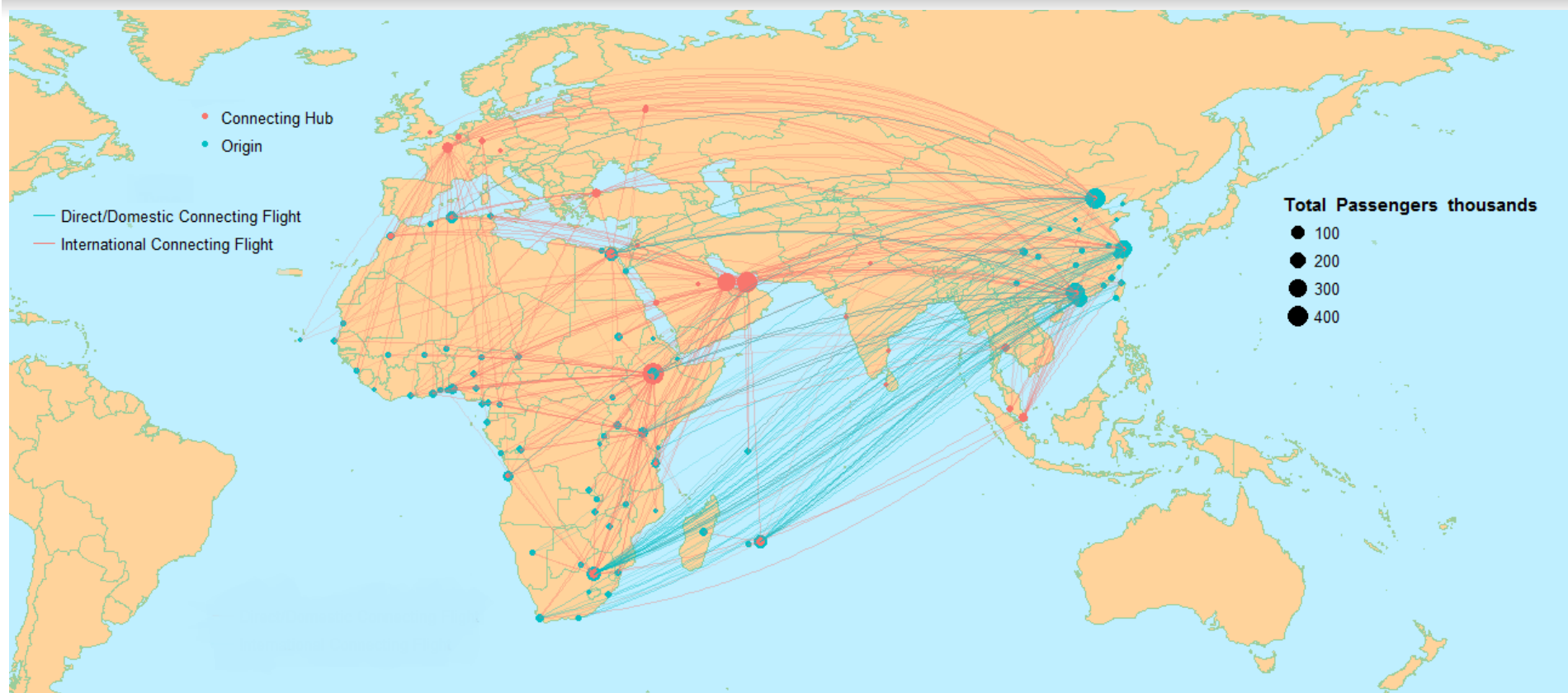


Source : ICAO-ICM Marketing Information Data Transfer (MIDT) Data Analysis



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Connectivity map China-Africa in 2015

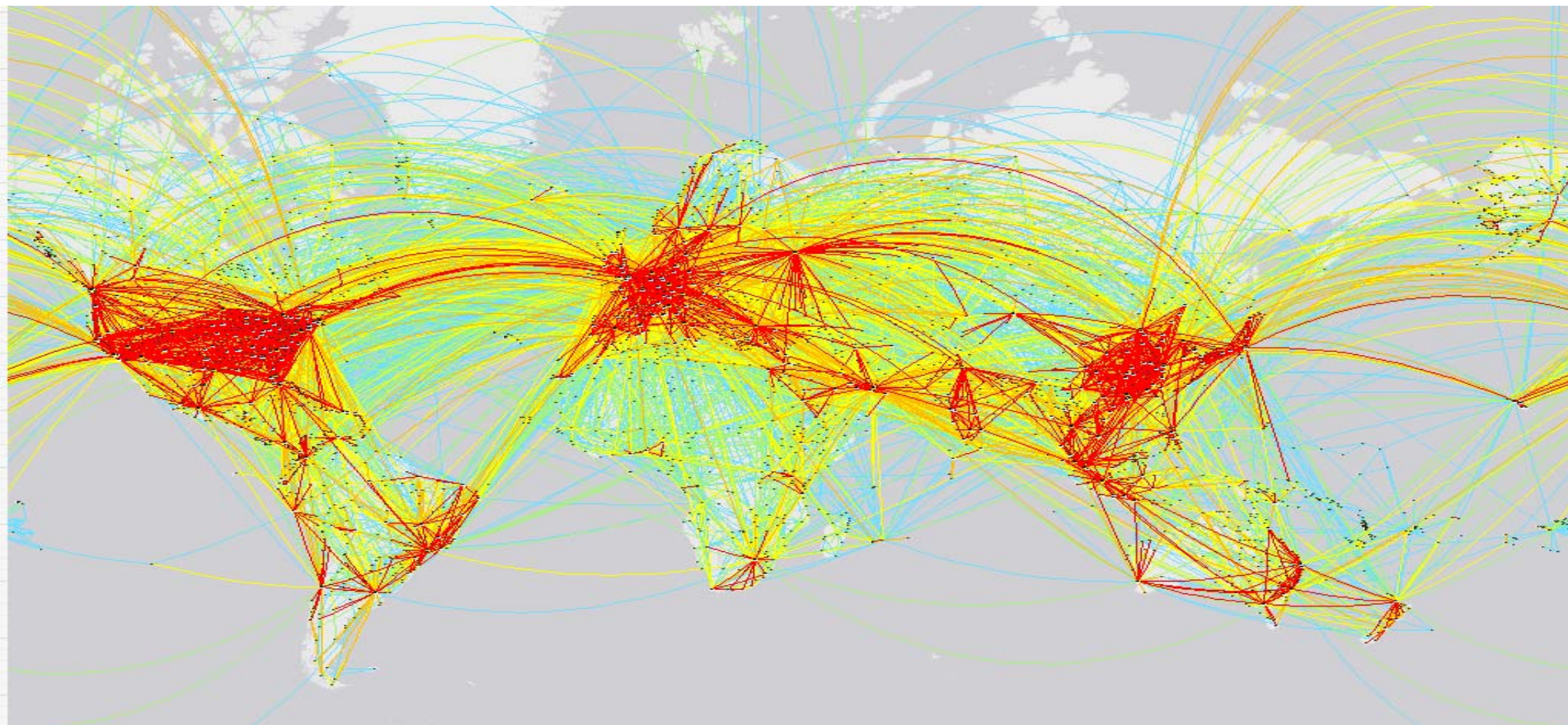


Source : ICAO-ICM Marketing Information Data Transfer (MIDT) Data Analysis



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Air route network 2015



Source: ICAO



E-commerce



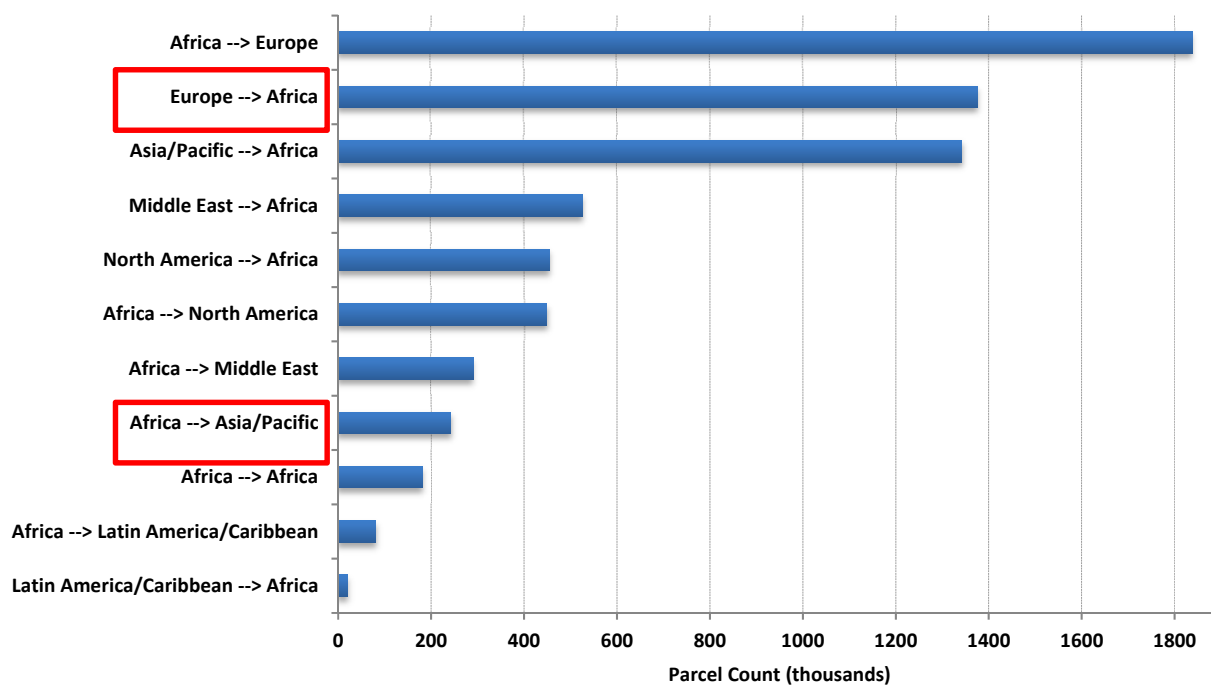
Electronic commerce (e-commerce) refers to “the production, advertising, sale and distribution of products via telecommunications networks” (World Trade Organization, WTO)

Electronic shopping (e-shopping) refers to “the advertising, sales, payment and delivery of products and services via the Internet, covering the whole supply chain from the seller to the buyer” (Universal Postal Union, UPU)

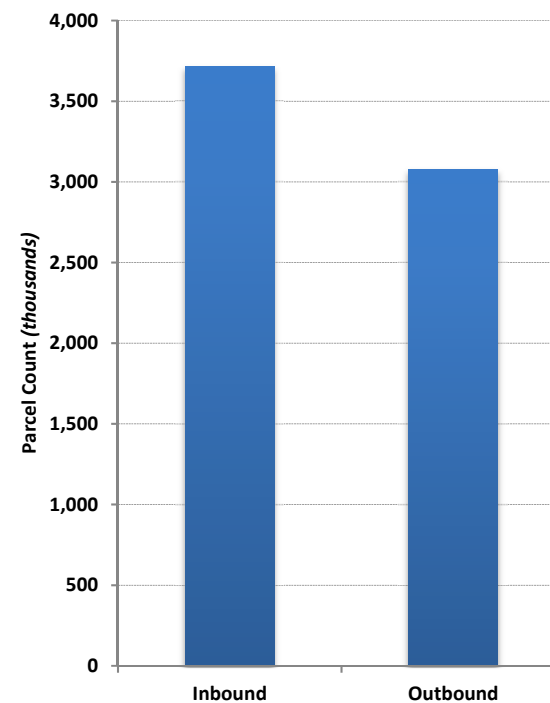


E-commerce to/from Africa and other Regions

**Africa E-Commerce* Activity 2015
(one Way, Number of Parcels)**

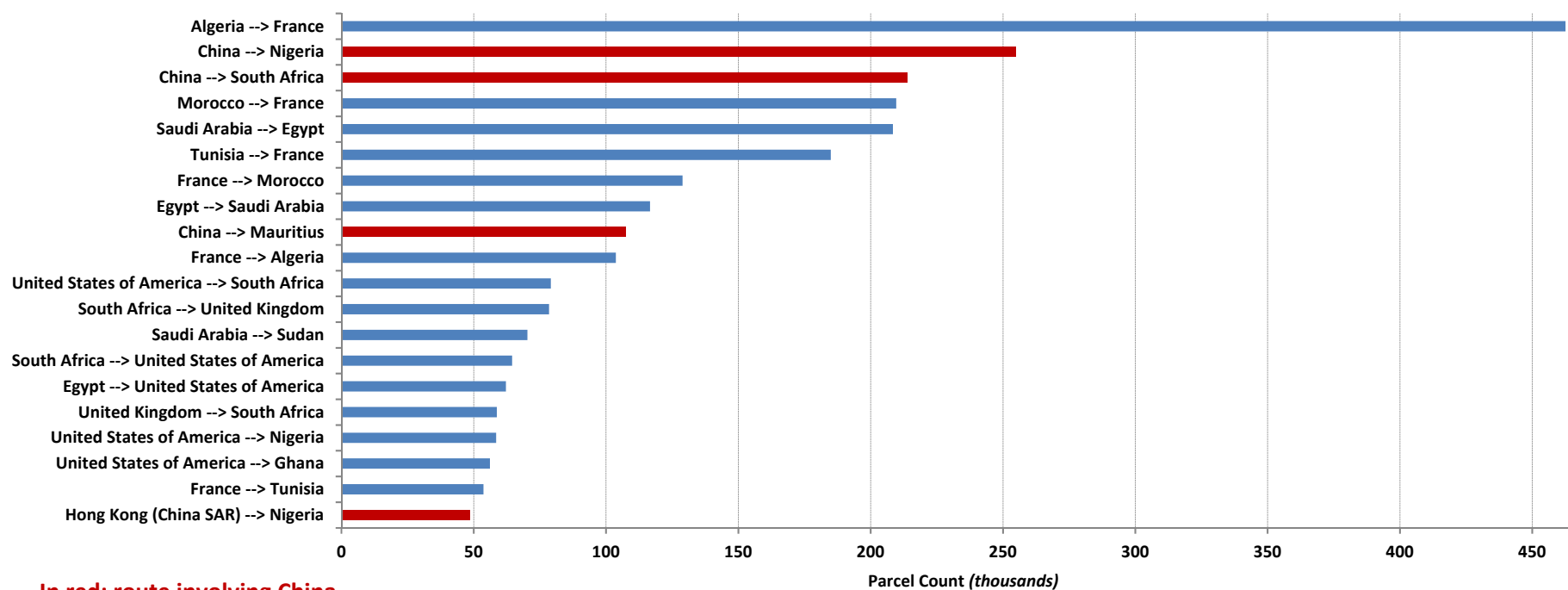


**Africa Overall E-commerce
Activity 2015**





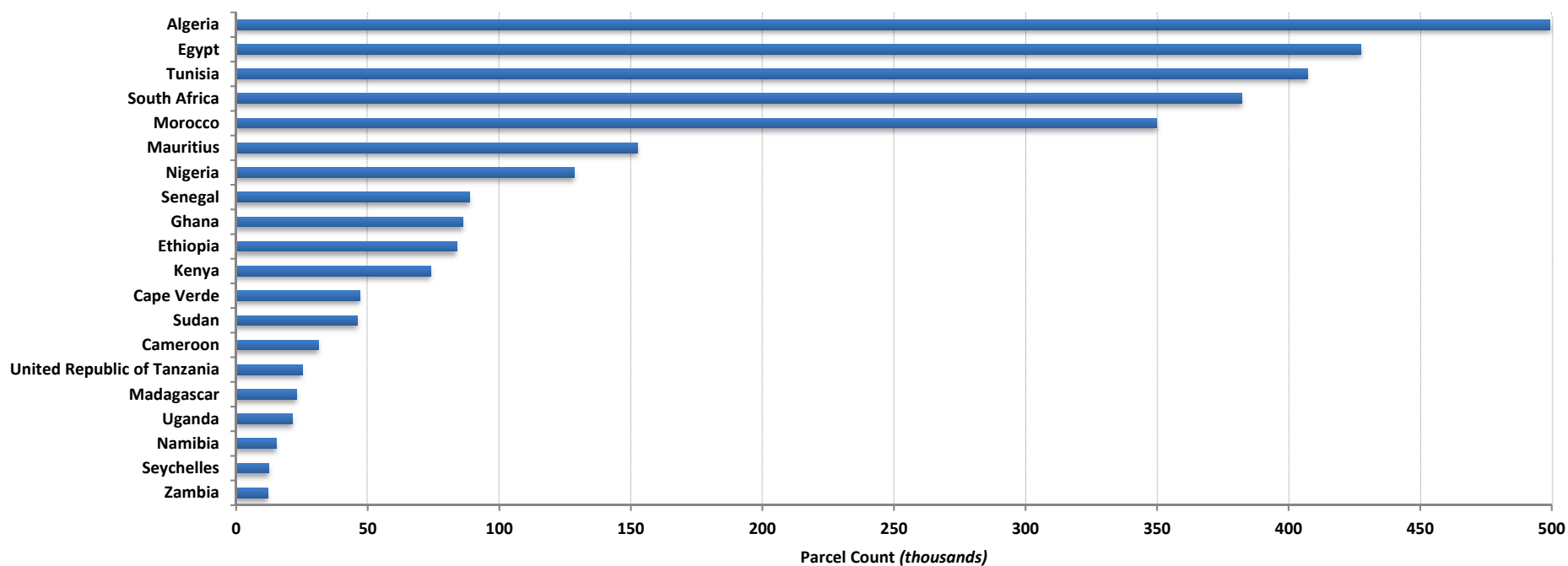
Africa E-Commerce Activity Top 20 Country-Pairs (One Way, Number of Parcels)



In red: route involving China



Africa E-commerce Activity Top 20 African Countries (Departure basis, Number of Parcels)



Source: ICAO and Universal Postal Union (UPU)



Silk Road – a bridge between East and West

Ancient Silk road: ‘greatest route in the history of mankind’ (200 BC)

UNWTO Initiative

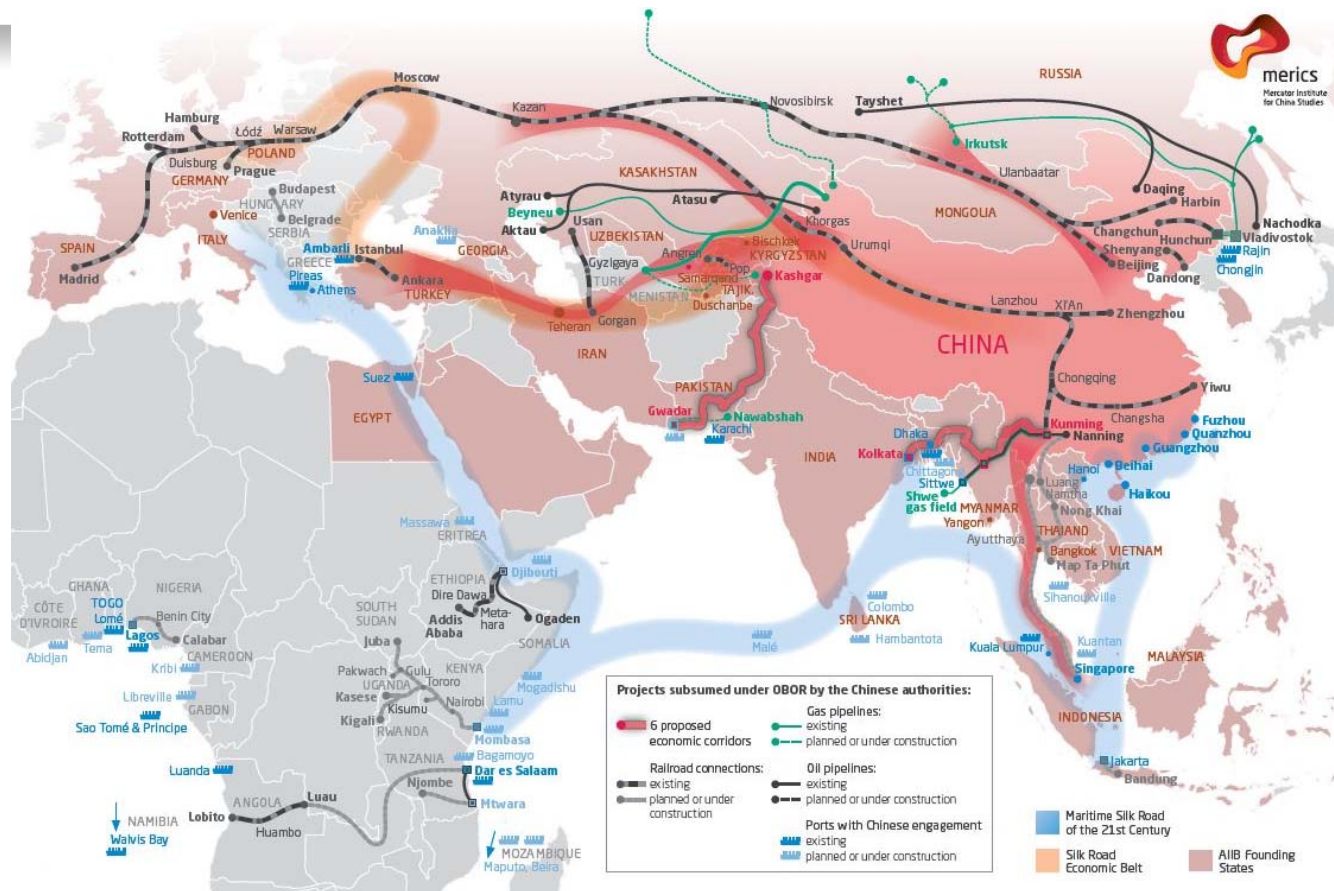
- channel for contact between people and cultures, inspiring the exchange of dialogue, art, religion, ideas & technology
- key areas of work:
 - Marketing and Promotion
 - Destination Management
 - Travel Facilitation (**Seamless Travel**)





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One Belt, One Road





Intermodal Transport Planning Systems

- A well-designed intermodal transport infrastructure supports the sustainable social, economic and environmental development of the world.
- Integrate ICAO's sustainable aviation development efforts into a new approach
 - balances the needs of multiple transport modes
 - best-practice-based urban development
- New technology will improve economic and operational efficiency of the civil aviation system.

-> enhancing the travel experience of passengers



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Thank you

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Professionals
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