



ICAO

**FIRST UNWTO/ICAO MINISTERIAL CONFERENCE
Tourism and Air Transport in Africa**

CONCEPT NOTE

Victoria, Mahé, Seychelles

13-15 October 2014

As recalled in the *Joint Statement on Aviation and Tourism*, signed on 18 March 2013 by the International Civil Aviation Organization (ICAO) and the World Tourism Organization (UNWTO), air transport and tourism are major contributors to global economic prosperity. In 2013, a record of 1.087 million tourists crossed international borders, more than half by air, with long-haul tourism experiencing the fastest expansion. The total number of international tourists, which includes both business and leisure travellers, is expected to reach 1.8 billion by 2030. This will further increase the demand for air transport services, with overall annual aircraft departures forecast to grow from today's 30 million to 60 million in 2030.

The symbiotic relationship between aviation and tourism is reflected at the global level in the respective mandates of ICAO and 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.

Tourism has clearly emerged as an important lever of socio-economic development and growth in many territories around the world, especially in developing countries. Tourism has the ability to generate significant amount of foreign exchange earnings, spur infrastructure investment, boost competition, and stimulate other economic industries, as recognized by international organizations such as UNWTO. Tourism in many developing and least developed countries is one of the principal sources, and in some countries the main source, of foreign exchange earnings. Tourism is regarded by many as the most viable and sustainable economic development option.

UNWTO in its recently updated long-term outlook forecasts international tourist arrival to reach 1.4 billion by 2020 and 1.8 billion by the year 2030 with emerging economy destinations expected to outperform advanced economy destinations. According to ICAO's publication *Global Air Transport Outlook to 2030 and Trends to 2040 (Cir 333)*, the global scheduled passenger traffic is expected to grow between 2011 and 2030 at an average annual rate of 4.6 per cent.

Africa has undoubtedly a huge tourism potential that remains untapped. The continent with its natural resource endowment and its authenticity and originality as a destination is well positioned to obtain more value from tourism. Nevertheless, the region has not yet managed to attain access to the global

market on a scale that would enable tourism to be an effective force of development that it could become. Tourism base volume in Africa is still low compared with other regions. The number of international tourist arrivals expressed in percentage of the population in Africa is 5.4 arrivals per 100 of the population, compared to 14.7 per 100 of the population worldwide, or 59.2 per 100 in Europe. However, it is worth mentioning that during the last decade Africa has recorded an average growth rate almost two percentage points higher than the world as a whole, thereby pointing out a narrowing gap in these figures.

In Africa, the tourism sector is highly dependent on air transportation. In 2012, almost half of the 53 million of tourists that visited Africa have traveled by air, a proportion that is set to continue- by 2030, UNWTO forecasts international tourists to the African continent to reach 134 million, out of which around 61 million are expected to arrive by air. But, the availability of air transport services in comparison with other parts of the world remains considerably small. The African population which represents 15% of the world's population is catered by only around 4% of all scheduled air service seats in the world, compared to 27% in Europe which has 11% of the population of the world.

African skies have drastically changed over the last few decades with the emergence of new carriers. Between 2004 and 2013, progress in the liberalization of traffic rights, coupled with the 4.5 per cent annual economic growth rate for the African continent, resulted in 500 new routes between Europe and Africa, 420 within Africa, and 125 between Africa and the Middle East, without forgetting the increasing number of direct flights between Africa and the Americas.

The African Ministers responsible for civil aviation adopted the Yamoussoukro Decision on 14 November 1999 which promotes the liberalization of access to air transport markets in Africa. Positive developments have been noted in several African hubs since the implementation of the Yamoussoukro Decision, all of which highlight the encouraging effects that regional liberalization has on the sustainable development of air transport. However, there is still room for improvement and a lot of commitment will still be necessary for the full benefits of the Yamoussoukro Decision to materialize.

The development of tourism and air transport in Africa still faces a number of hindrances. Issues such as infrastructure funding, enhancement of air connectivity, market liberalization, taxation, travel facilitation and cross-cultural dimension are of a vital importance to the development of the continent. A collective and effective strategy addressing these challenges will enable both tourism and air transport industries to stimulate growth of the overall economy and create many opportunities for employment and welfare.

While air transport is vital for the development of tourism in Africa, the reverse is equally true. UNWTO and ICAO recognize the strong interdependence between the development of air transport and tourism, and are committed to ensuring the sustainable development of both sectors

The conference will identify areas for improvement and agree on procedures for enhancing connectivity and seamless travel in the African continent. The conference will also contribute significantly to the delivery of pragmatic, forward-looking proposals that will allow international governments to obtain their fair share out of the future growth of global tourism, ensuring a prosperous and sustainable tomorrow for Africa.