Air Transport and Tourism in Africa
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.
We, the representatives of Member States and private sector entities, attending the Joint UNWTO/ICAO High-Level Forum on Tourism and Air Transport for Development, gathered to discuss and strengthen the path of cooperation of tourism and air transport by addressing today’s challenges related to policy convergence, connectivity, competitiveness and travel facilitation with a view to harnessing the full potential of these sectors to create jobs, drive inclusive growth and foster sustainable development and in support of the UN Sustainable Development Goals (SDGs),
Recalling the Luanda Declaration on Tourism and Air Transport Connectivity of 29 April 2014, which pointed out the need to address critical issues related to bridging air transport and tourism policies while reaffirming the need for developing programmes of interregional cooperation between bodies responsible for tourism and air transport so as to improve and strengthen the basic conditions for the sustainable development of tourism,
Governments should avoid unnecessary regulations and burdens in their policy implementation and take special steps to optimize connectivity and implement coordinated and holistic measures towards tourism and air transport development. They should also assess the benefits of tourism and air transport against different development opportunities, resources used and values created.

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.
Under a gradual and balanced liberalization of air services, regional and global air links would be expanded and connectivity would be increased. Competitiveness would improve, foreign direct investment would increase, and economic development would accelerate. Governments should therefore actively pursue the continuous liberalization of international air transport to the benefit of all stakeholders and the economy at large guided by the need to ensure respect for the highest levels of safety and security and the principle of fair and equal opportunity for all States and their stakeholders.
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.

Governments and the aviation industry should avoid imposing unjustified taxes, charges and other levies on international aviation which may have negative impacts on the competitiveness of the air transport and tourism industries and national economies.
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

Source: World Tourism Organization (UNWTO)
International tourists arrival - 2015

Europe, 608 mn, 51%
Asia and the Pacific, 279 mn, 24%
Americas, 191 mn, 16%
Africa, 53 mn, 5%
Middle East, 53 mn, 4%

International tourism receipts – 2015 (USD)

Europe, 448 bn, 36%
Asia and the Pacific, 419 bn, 34%
Americas, 277 bn, 23%
Africa, 33 bn, 3%
Middle East, 55 bn, 4%

Source: World Tourism Organization (UNWTO)
Air route network 2015

Source: ICAO
Web of bilateral air services agreements

Source: ICAO WASA Map Tool

2015 data
Bilateral open skies

States which signed open skies agreements with both the US and third countries
States which signed open skies agreements with the US only
States which signed open skies agreements with the third countries only

Over 400 Open Skies Agreements involving 146 States
Comparing the number of markets made available by air transport liberalization ("available" or "reserved" connectivity) with the number of those markets having actual air services ("real" connectivity)

About 60% of available connectivity opportunities do not have direct flights

Source: ICAO
Intra African arrangements for liberalization

• the Yamoussoukro Decision relating to the implementation of the Yamoussoukro Declaration concerning the liberalization of access to air transport markets in Africa (2000); and

ECOWAS States

15 Member States

Benin, Burkina Faso, Cabo Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Côte d’Ivoire, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo
Traffic performed by Airlines based in ECOWAS States in 2015

*Share of the African total*

- **5.7 million** passenger carried: 7.7%
- **4.9 billion** Revenue Passenger-Kilometres (RPK) performed: 3.4%
- **19,900 tonnes** of freight carried: 2.3%

Source: ICAO
Traffic maps in the ECOWAS States - 2015

Source: ICAO
### Air transport by region in 2015

<table>
<thead>
<tr>
<th>Region</th>
<th>Aircraft departures (million)</th>
<th>Passengers carried (million)</th>
<th>Revenue Passenger-Kilometres (billion)</th>
<th>Freight Tonne-Kilometres (billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>1.0 +1.6%</td>
<td>74.0 +1.6%</td>
<td>142.9 +2.4%</td>
<td>3.3 -0.4%</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>9.8 +6.0%</td>
<td>1,205.7 +9.1%</td>
<td>2,108.4 +9.2%</td>
<td>78.1 +2.3%</td>
</tr>
<tr>
<td>Europe</td>
<td>8.3 +2.4%</td>
<td>927.8 +6.6%</td>
<td>1,765.1 +5.8%</td>
<td>43.1 -0.4%</td>
</tr>
<tr>
<td>Latin America/Caribbean</td>
<td>2.9 +2.7%</td>
<td>260.2 +5.1%</td>
<td>349.4 +7.8%</td>
<td>5.7 -5.2%</td>
</tr>
<tr>
<td>Middle East</td>
<td>1.2 +5.0%</td>
<td>186.7 +7.5%</td>
<td>606.4 +10.3%</td>
<td>28.0 +12.4%</td>
</tr>
<tr>
<td>North America</td>
<td>10.8 -0.3%</td>
<td>878.5 +4.8%</td>
<td>1,629.2 +5.1%</td>
<td>39.3 -2.5%</td>
</tr>
</tbody>
</table>

**Source:** ICAO Annual Report of the Council
Passenger traffic trends in Africa

Revenue Passenger-Kilometres – RPK
- Total +2.4%
  - International +2.3%
  - Domestic +2.7%

Available Seat-Kilometres – ASK
- Total +2.0%
  - International +1.9%
  - Domestic +2.7%

Passenger Load Factor – LF
- Total 68.1% (+0.3 pts)
  - International 67.5% (+0.3 pts)
  - Domestic 71.5% (stable)

Source: ICAO Annual Report of the Council
Cargo traffic trends in 2015 Africa

Freight Tonnes-Kilometres (FTK)

Total -0.4%
International -0.3%
Domestic -4.3%

Source: ICAO Annual Report of the Council
Traffic forecasts in AFRICA region
Africa top international passenger traffic by route group and projected yearly growth

Cargo traffic of African airlines is expected to grow by 2.1% annually in the next 20 years
Connectivity in AFRICA region
Connectivity Concept

Capacity of the transport value chain to move passengers, mail or cargo from one point to another, with:

- Shortest possible time
- Maximum user satisfaction
- Adequate price

Supporting regulatory framework to optimize connectivity:
### Routes between (Morocco+Senegal) and (Kenya+Tanzania)

<table>
<thead>
<tr>
<th>Route Description</th>
<th>Passengers</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct one-stop flight</td>
<td>6,807</td>
<td>26.9%</td>
</tr>
<tr>
<td>Via Dubai (DXB)</td>
<td>2,856</td>
<td>11.3%</td>
</tr>
<tr>
<td>Via Nairobi (NBO)</td>
<td>2,324</td>
<td>9.2%</td>
</tr>
<tr>
<td>Via Addis Ababa (ADD)</td>
<td>1,811</td>
<td>7.1%</td>
</tr>
<tr>
<td>Via Jeddah (JED)</td>
<td>1,492</td>
<td>5.9%</td>
</tr>
<tr>
<td>Via Doha (DOH)</td>
<td>1,470</td>
<td>5.8%</td>
</tr>
<tr>
<td>Via Brazzaville (BZV)</td>
<td>1,245</td>
<td>4.9%</td>
</tr>
<tr>
<td>Via Casablanca (CMN) and Dubai (DXB)</td>
<td>1,019</td>
<td>4.0%</td>
</tr>
<tr>
<td>Via Casablanca (CMN) and Doha (DOH)</td>
<td>601</td>
<td>2.4%</td>
</tr>
<tr>
<td>Via Cairo (CAI)</td>
<td>490</td>
<td>1.9%</td>
</tr>
<tr>
<td>Via Jeddah (JED) and Addis Ababa (ADD)</td>
<td>447</td>
<td>1.8%</td>
</tr>
<tr>
<td>Other connecting points</td>
<td>4,788</td>
<td>18.9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>25,350</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

*Source: ICAO, ICM*
## Top international origin and destination city pairs in Africa with no direct flights

<table>
<thead>
<tr>
<th>City Pair</th>
<th>Total Passengers</th>
<th>Top Connecting Hub</th>
<th>Top Connecting Hub Passengers</th>
<th>Top Connecting hub % of Total Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harare (Zimbabwe) &lt;&gt; Cape Town (South Africa)</td>
<td>69,628</td>
<td>Johannesburg (JNB)</td>
<td>65,777</td>
<td>94%</td>
</tr>
<tr>
<td>Lusaka (Zambia) &lt;&gt; Cape Town (South Africa)</td>
<td>48,463</td>
<td>Johannesburg (JNB)</td>
<td>44,559</td>
<td>92%</td>
</tr>
<tr>
<td>Mombasa (Kenya) &lt;&gt; Dar es salaam (United Republic of Tanzania)</td>
<td>45,893</td>
<td>Kilimanjaro (JRO)</td>
<td>20,295</td>
<td>44%</td>
</tr>
<tr>
<td>Victoria Falls (Zimbabwe) &lt;&gt; Cape Town (South Africa)</td>
<td>43,946</td>
<td>Johannesburg (JNB)</td>
<td>43,446</td>
<td>99%</td>
</tr>
<tr>
<td>Lagos (Nigeria) &lt;&gt; Cape Town (South Africa)</td>
<td>39,065</td>
<td>Johannesburg (JNB)</td>
<td>38,267</td>
<td>98%</td>
</tr>
<tr>
<td>Nairobi (Kenya) &lt;&gt; Cape Town (South Africa)</td>
<td>37,426</td>
<td>Johannesburg (JNB)</td>
<td>36,826</td>
<td>98%</td>
</tr>
<tr>
<td>Mombasa (Kenya) &lt;&gt; Entebbe (Uganda)</td>
<td>36,491</td>
<td>Nairobi (NBO)</td>
<td>32,853</td>
<td>90%</td>
</tr>
<tr>
<td>Saint Denis (Réunion, France) &lt;&gt; Rodrigues Island (Mauritius)</td>
<td>33,675</td>
<td>Port Louis (MRU)</td>
<td>33,675</td>
<td>100%</td>
</tr>
<tr>
<td>Livingstone (Zambia) &lt;&gt; Cape Town (South Africa)</td>
<td>31,122</td>
<td>Johannesburg (JNB)</td>
<td>31,109</td>
<td>100%</td>
</tr>
<tr>
<td>Dakar (Senegal) &lt;&gt; Abuja (Nigeria)</td>
<td>24,340</td>
<td>Lagos (LOS)</td>
<td>14,696</td>
<td>60%</td>
</tr>
</tbody>
</table>

**Source:** ICAO, ICM
Low-cost carriers (LCCs) stimulating traffic

Share of passengers carried by LCCs in 2015

Passenger number growth for LCCs and other carriers

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCCs</td>
<td>9.8%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Others</td>
<td>4.2%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Total</td>
<td>5.7%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

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

Source: ICAO
Passengers in thousands

- 1009
- 2009

Source: ICAO
ICAO assistance for implementing State/Regional Action Plans, derived from:

**Togo**
- 5 to 7 August 2014
- Declaration on the Development of Air Cargo in Africa

**Madagascar**
- 25 to 27 March 2015
- Declaration on the Sustainable Development of Air Transport in Africa
ISSUES AND CHALLENGES TO BE ADDRESSED

- Existing aviation Infrastructure should be in line with the ICAO Global Air Navigation Plan (GANP) and policies.
- States and aviation Stakeholders should have access to funds and financing aviation infrastructure (runway expansion, telecommunication equipment, etc).
- Shortage of skilled manpower especially pilots, air traffic controllers, engineers and other technical personnel should be addressed.
- Level of safety and security regulatory oversight should be enhanced.
- Poor air connectivity and low traffic on some routes to sustain profitable operation should be addressed.
- High cost of tickets due to high cost of operations, taxes and charges should be addressed.
ICAO would continue to support the implementation of the Yamoussoukro Decision (YD), in line with the African Union Agenda 2063, which is a prerequisite to the African integration of trade and travel under the Continental Free Trade Area (CFTA)
PKD Membership
– 54 States + 3 entities

Legend
- PKD Participants
- States issuing ePassports
- States issuing MRPs
Thank you

http://www.icao.int/sustainability/Pages/AT-MonthlyMonitor.aspx