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Air Transport and Tourism in Africa





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 30 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 interest through the following Joint Statement on Aviation and Tourism, symbolically signed on the occasion of the official opening of the ICAO Sixth 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 Montréal on 18 March 2013:

ICAO:

Mr. Bernard 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.



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Joint UNWTO/ICAO Medellín Statement on Tourism and Air Transport for Development 15 09 2015

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),



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Joint UNWTO/ICAO Medellín Statement on Tourism and Air Transport for Development 15 09 2015

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,,



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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.



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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.



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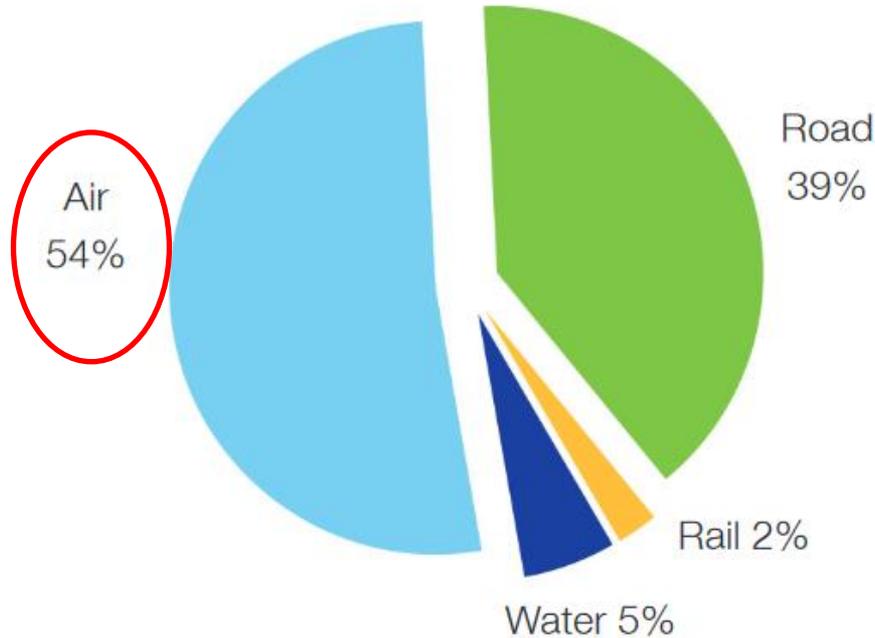


Travel facilitation is of great importance for the development of present-day tourism and Member States should pursue their efforts to implement the provisions of previous declarations and recommendations, especially those encouraging travel facilitation and, when appropriate, lend their support to UNWTO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

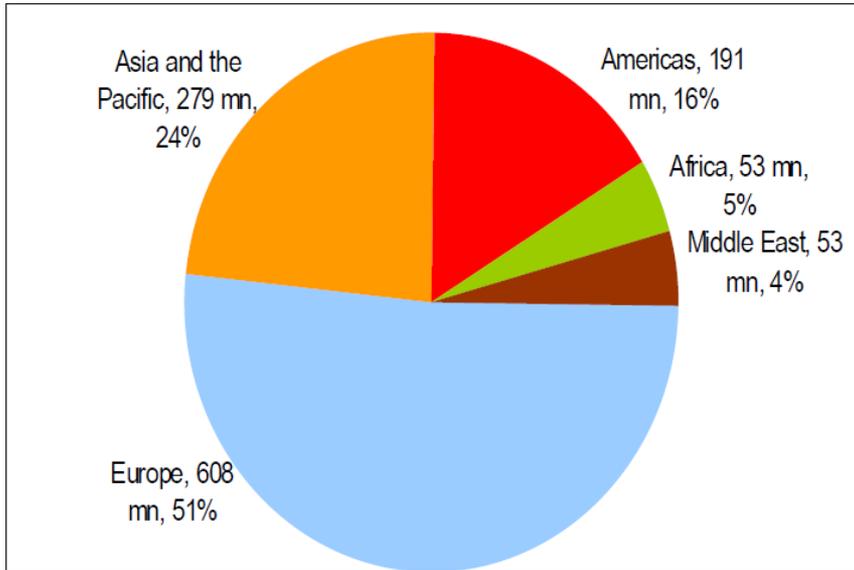


- Tourism expansion relies heavily on air transport, providing substantial economic benefits for anyone involved in the value chain of tourism
- Separate sectorial policies on air transport and tourism result in a fundamental, and too often even conflicting disconnect which constitutes a severe constraint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

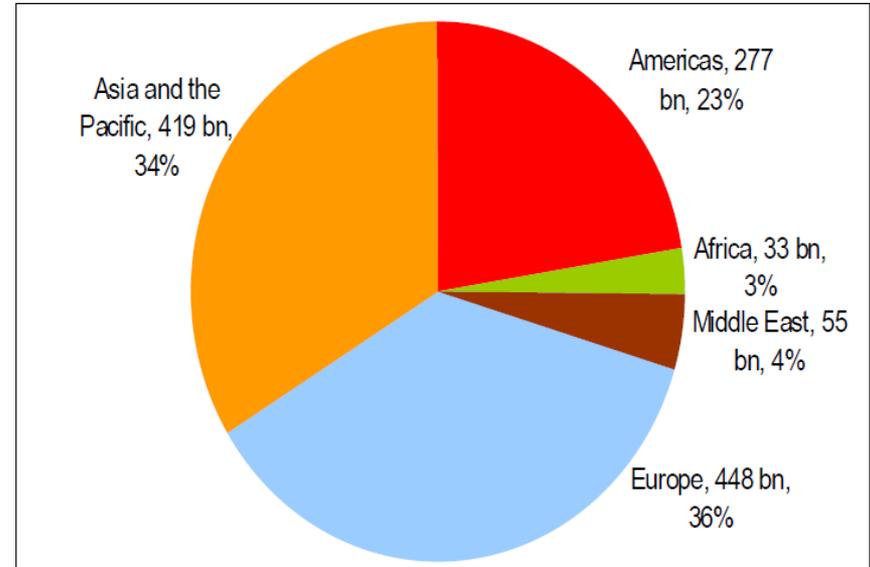
Inbound tourism by mode of transport in 2014

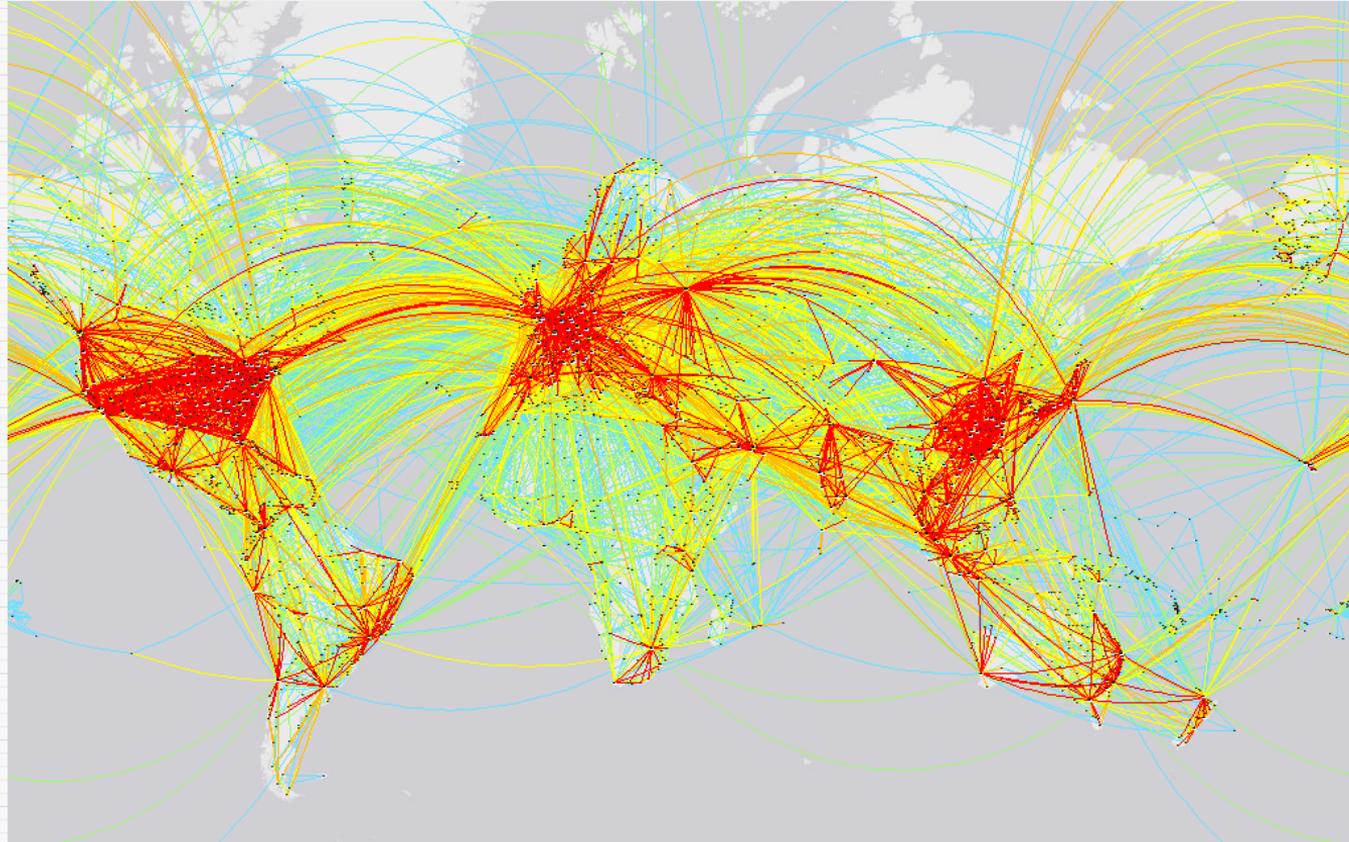


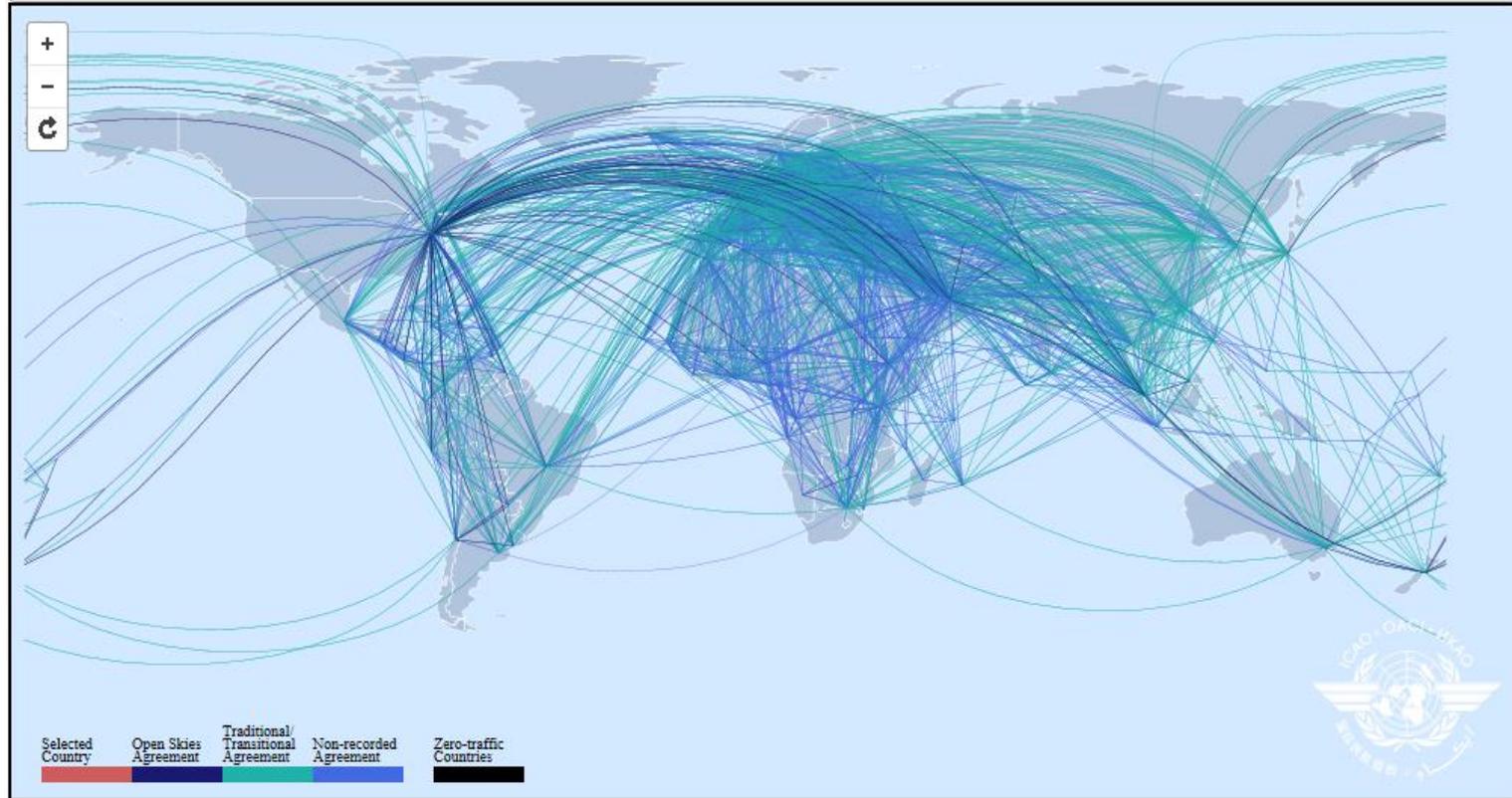
International tourists arrival - 2015



International tourism receipts – 2015 (USD)

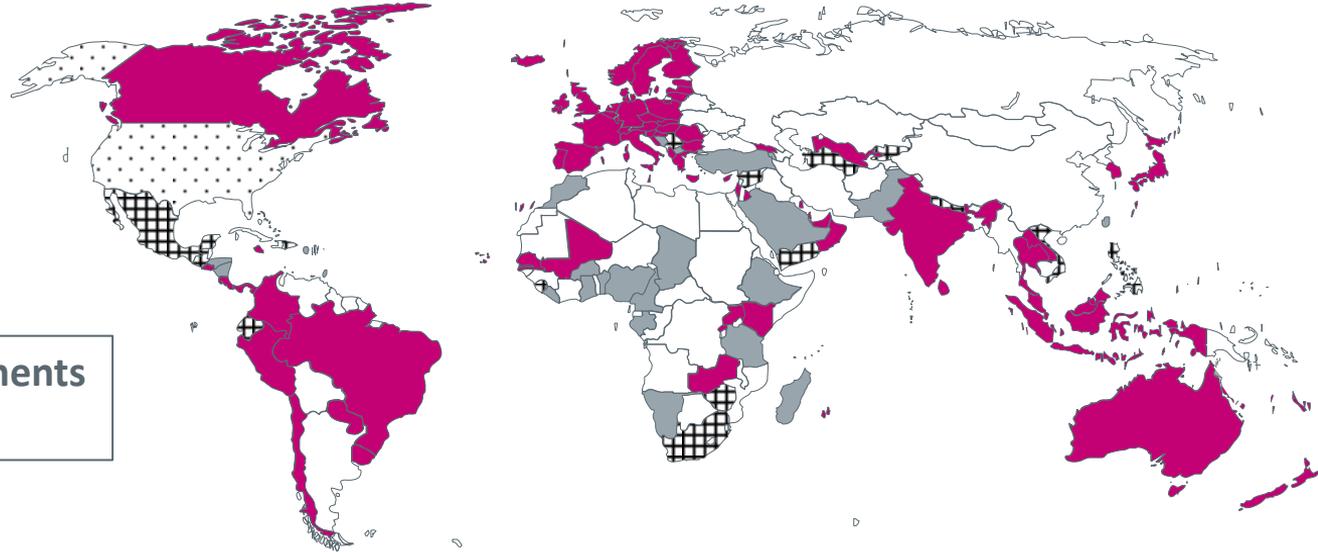






-  States which signed open skies agreements with both the US and third countries
-  States which signed open skies agreements with the US only
-  States which signed open skies agreements with the third countries only

Over 400 Open Skies Agreements involving 146 States

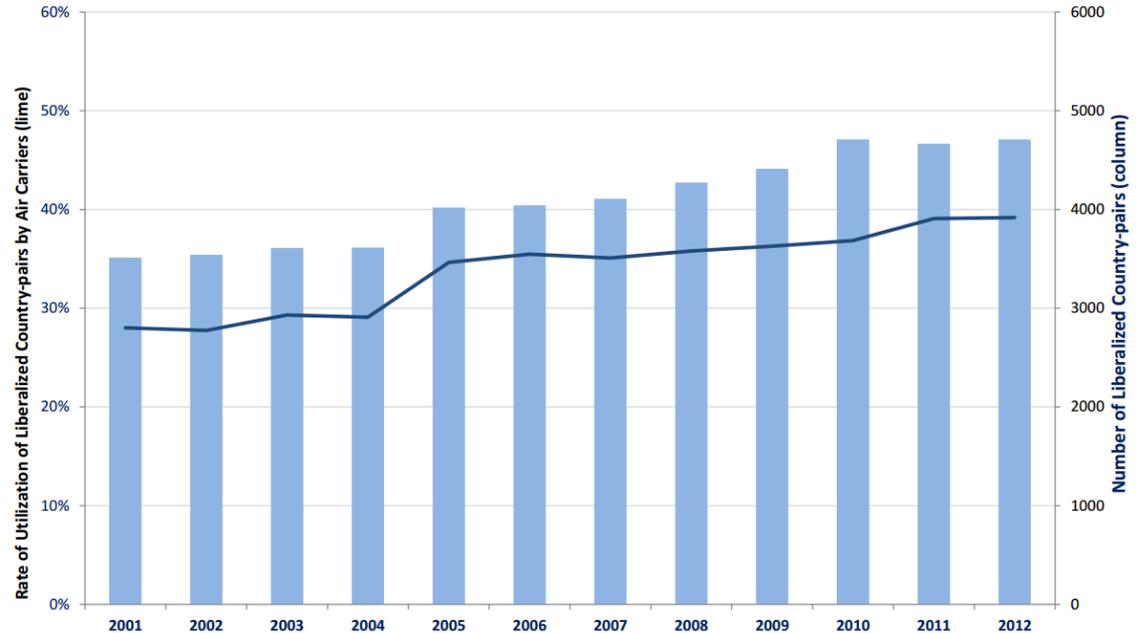




Comparing the number of markets made available by air transport liberalization (“available” or “reserved” connectivity) with the number of those markets having actual air services (“real” connectivity)

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

A Utilization Rate of Connectivity Opportunities at the Global Level





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
- The Declaration on the Establishment of a Single African Air Transport Market (SAATM) (2015), committed by 14 States from 2017.

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%



Traffic maps in the ECOWAS States - 2015

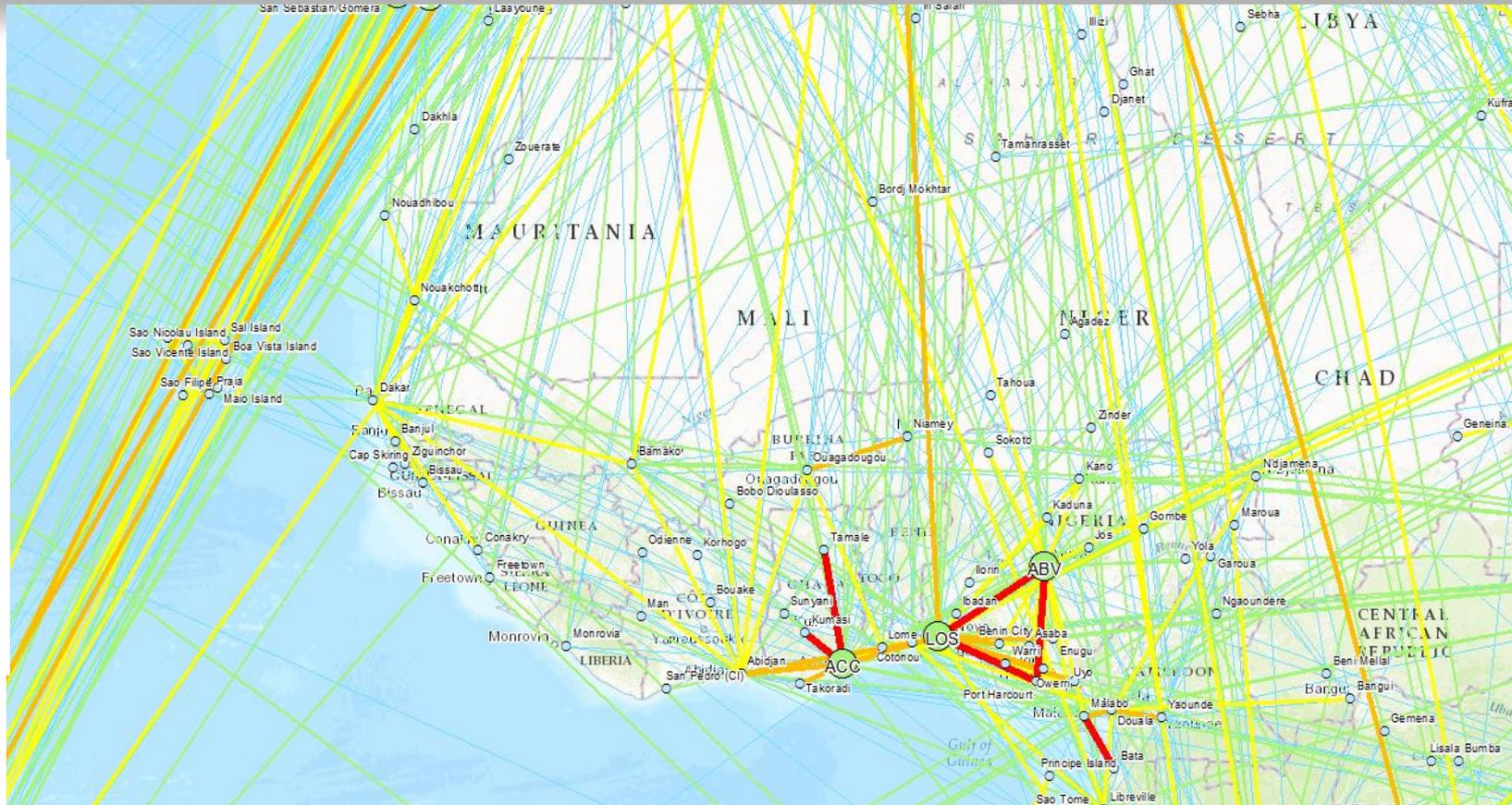
FLOWCHART2015

Mouv_2015

- 1 - 14999
- 15000 - 58929
- 58930 - 140764
- 140765 - 303197
- 303198 - 592762

flow mov 2015 003simplified

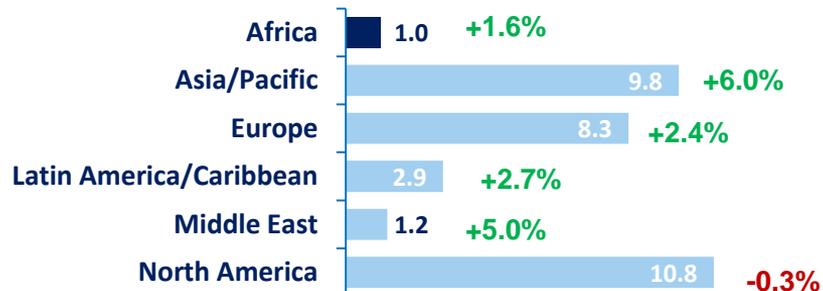
- 2101 - 47072
- 1001 - 2100
- 401 - 1000
- 166 - 400
- 1 - 165



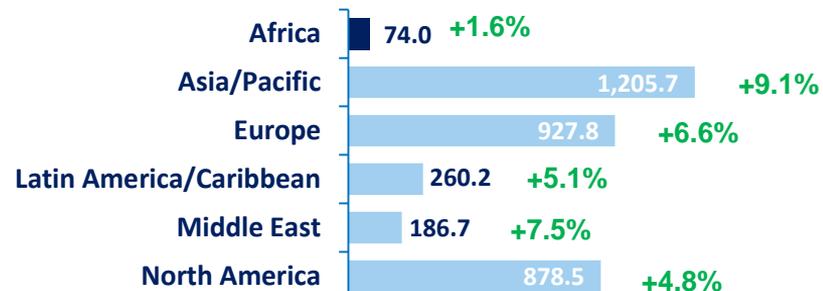


Air transport by region in 2015

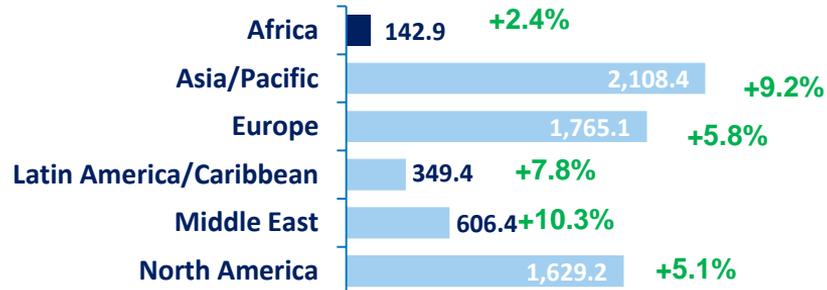
Aircraft departures (million)



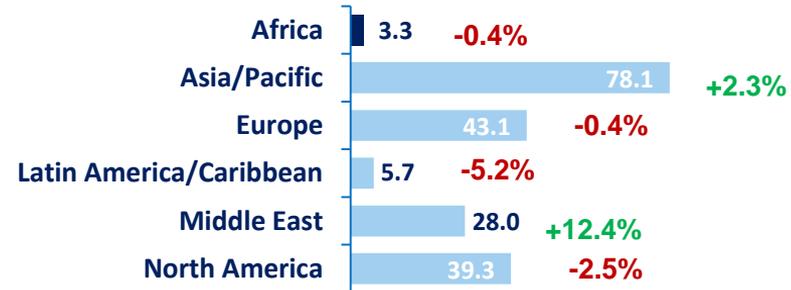
Passengers carried (million)



Revenue Passenger-Kilometres (billion)



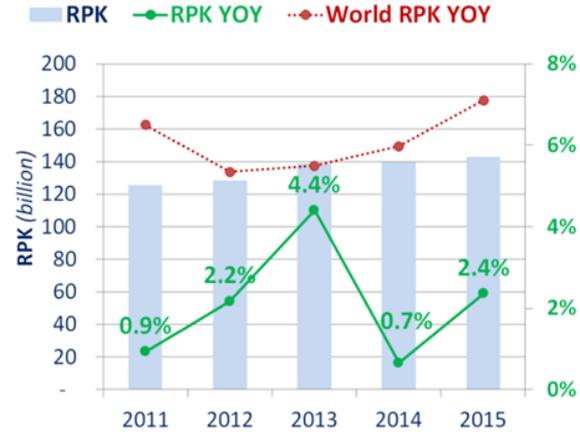
Freight Tonne-Kilometres (billion)





Passenger traffic trends in Africa

Revenue Passenger-Kilometres – RPK



Available Seat-Kilometres – ASK



Passenger Load Factor – LF



Revenue Passenger-Kilometres (RPK)

Total +2.4 %
International +2.3%
Domestic +2.7%

Available Seat-Kilometres (ASK)

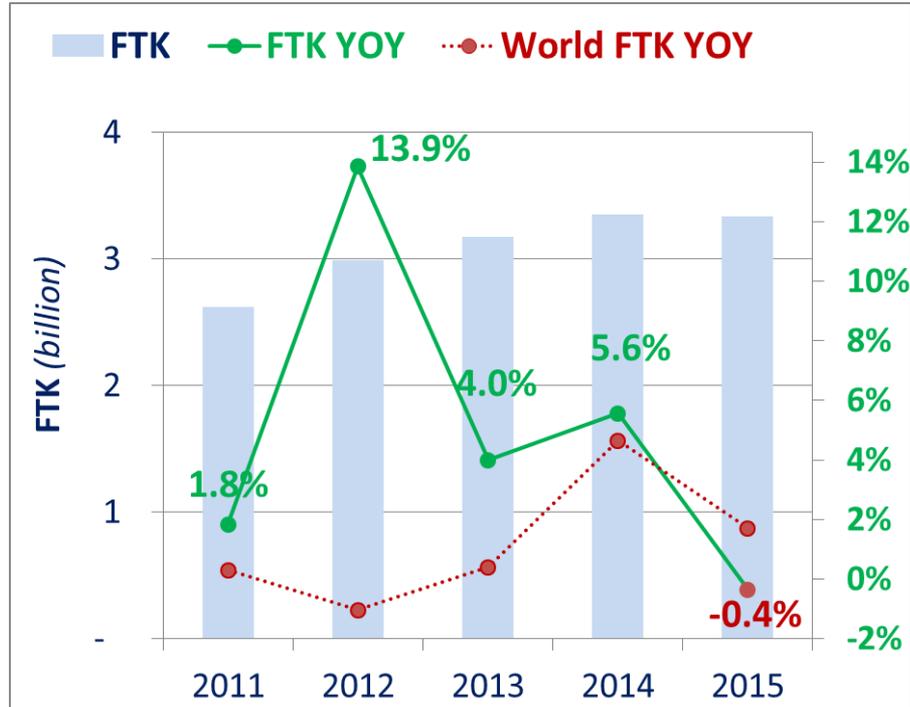
Total +2.0 %
International +1.9%
Domestic +2.7%

Passenger Load Factor (LF)

Total 68.1% (+0.3 pts)
International 67.5% (+0.3 pts)
Domestic 71.5% (stable)



Cargo traffic trends in 2015 Africa



Freight Tonnes-Kilometres (FTK)

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



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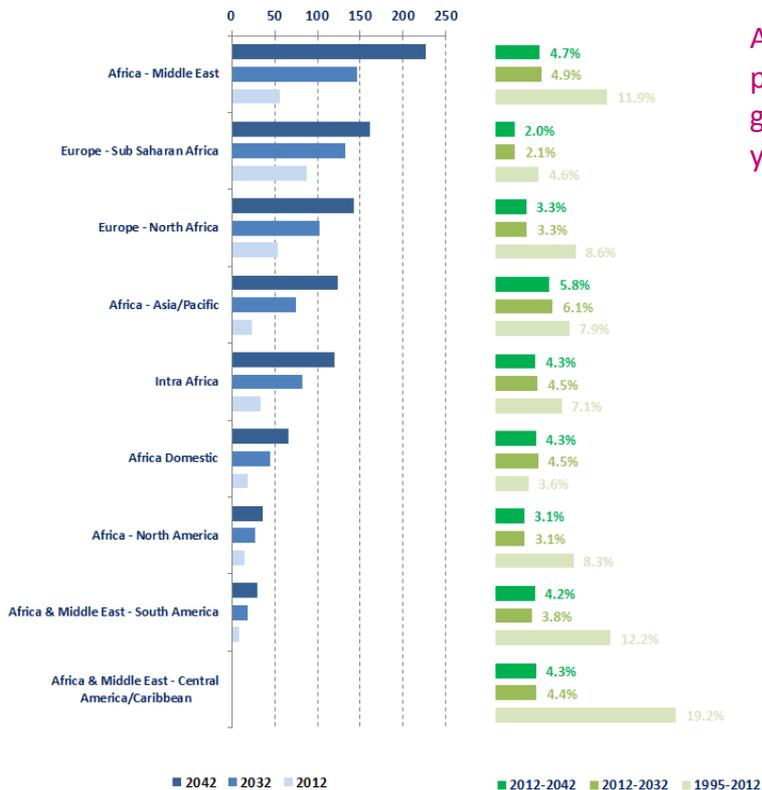


Traffic forecasts in AFRICA region



Revenue Passenger-Kilometres (RPK)
(billion)

CAGR*



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

Summary of Total Cargo Traffic Forecasts by Region of Airline Registration

(Scheduled Services)

Cargo traffic results in terms of FTKs

Region	Flight Stage	CAGR*		
		2012-2022	2012-2032	2012-2042
Europe	Total	2.9%	2.6%	2.4%
	International	2.9%	2.6%	2.4%
	Domestic	0.2%	0.8%	1.0%
Africa	Total	1.6%	2.1%	2.2%
	International	1.6%	2.1%	2.2%
	Domestic	0.3%	0.1%	0.1%
Middle East	Total	6.6%	7.1%	6.9%
	International	6.6%	7.1%	6.9%
	Domestic	1.4%	0.7%	0.5%
Asia and Pacific	Total	5.7%	5.1%	4.7%
	International	5.2%	4.7%	4.3%
	Domestic	8.7%	7.8%	7.0%
North America	Total	2.7%	2.5%	2.6%
	International	3.7%	3.5%	3.4%
	Domestic	0.8%	0.7%	0.6%
Latin America and the Caribbean	Total	3.1%	2.9%	2.8%
	International	3.4%	3.1%	3.0%
	Domestic	2.0%	1.7%	1.6%
WORLD	Total scheduled	4.4%	4.3%	4.2%
	International	4.5%	4.4%	4.2%
	Domestic	3.9%	4.0%	4.0%



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Connectivity in AFRICA region

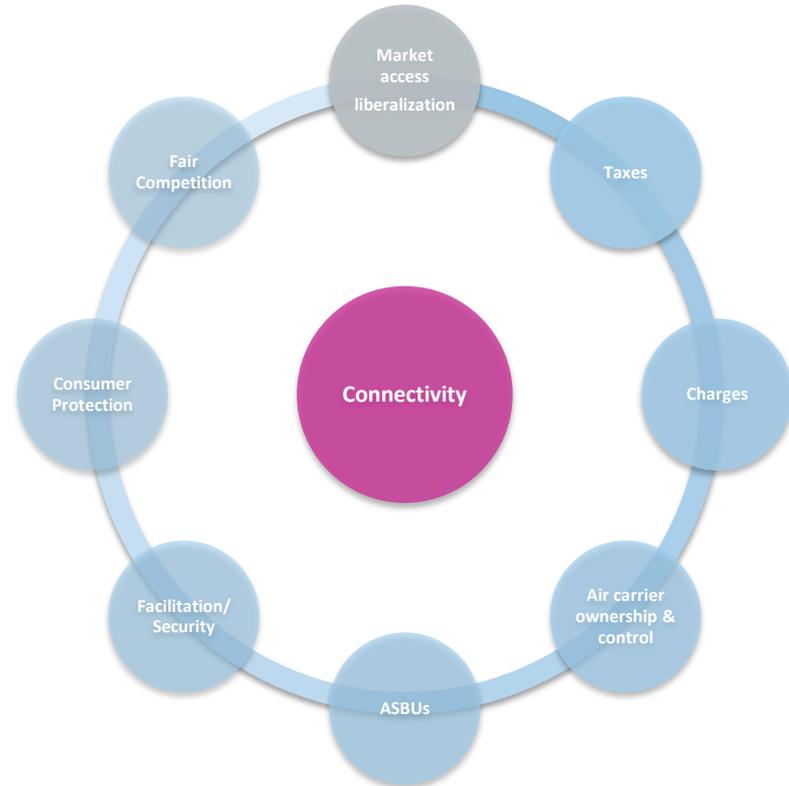
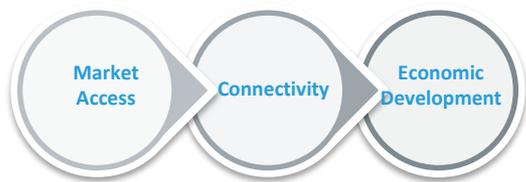


Connectivity Concept

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:

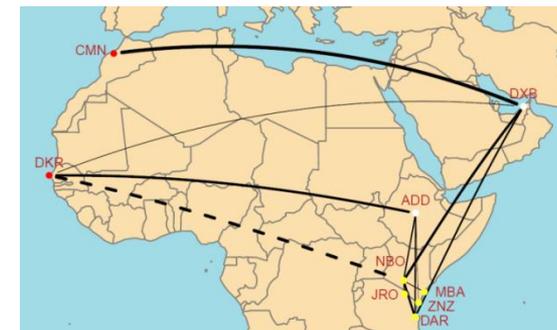




Routes between (Morocco+Senegal) and (Kenya+Tanzania)	Passengers	Share (%)
direct one-stop flight	6,807	26.9%
via Dubai (DXB)	2,856	11.3%
via Nairobi (NBO)	2,324	9.2%
via Addis Ababa (ADD)	1,811	7.1%
via Jeddah (JED)	1,492	5.9%
via Doha (DOH)	1,470	5.8%
via Brazzaville (BZV)	1,245	4.9%
via Casablanca (CMN) and Dubai (DXB)	1,019	4.0%
via Casablanca (CMN) and Doha (DOH)	601	2.4%
via Cairo (CAI)	490	1.9%
via Jeddah (JED) and Addis Ababa (ADD)	447	1.8%
other connecting points	4,788	18.9%
Total	25,350	100.0%



Direct one-stop flight



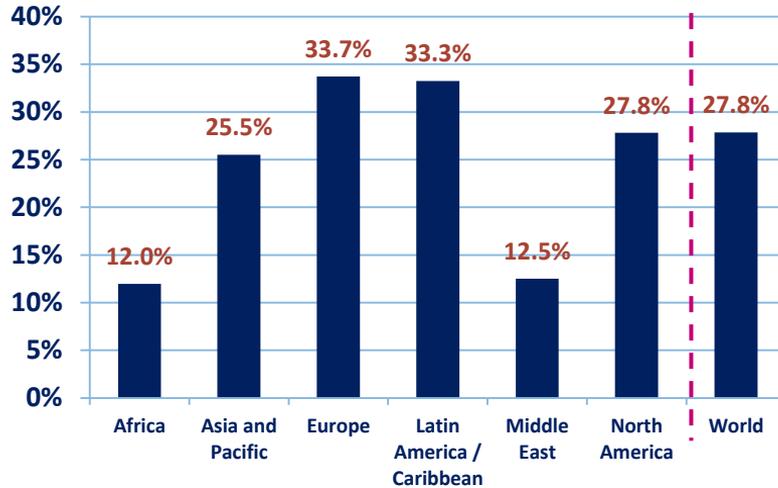
Major connecting routes



Top international origin and destination city pairs in Africa with no direct flights

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

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%

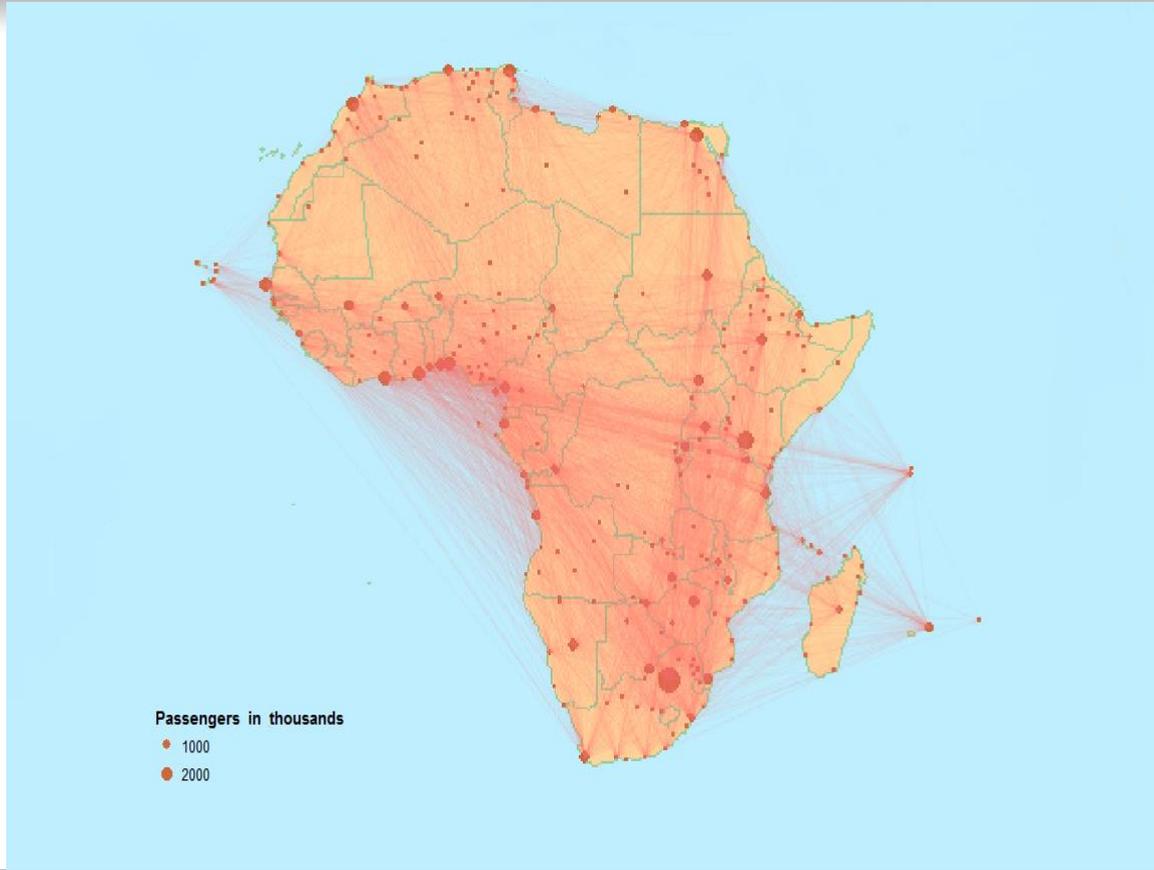
LCCs growth has been consistently twice as much as other carriers' growth



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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.



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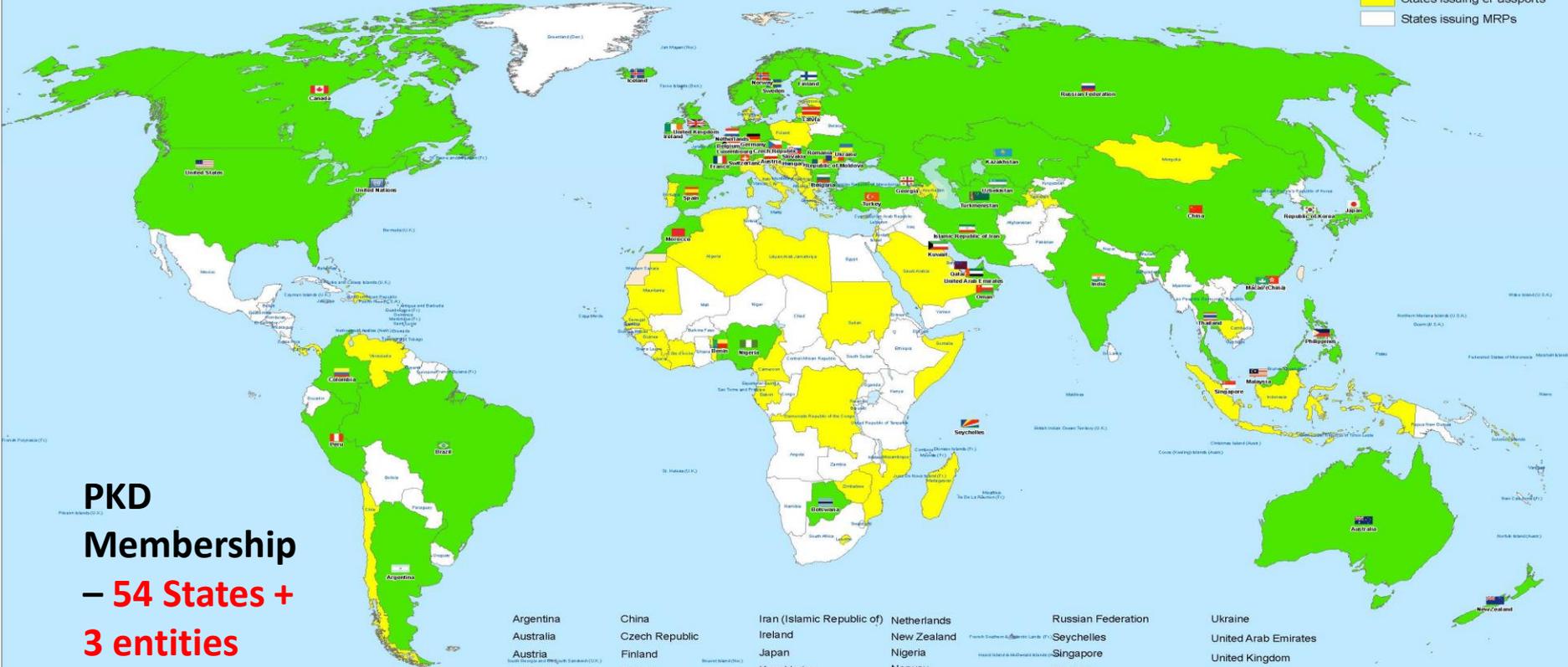


- ➔ **ICAO would continue to support** the implementation of the Yamoussoukro Decision (YD), in line with the African Union Agenda 2063, which is a prerequisite to the African integration of trade and travel under the Continental Free Trade Area (CFTA)

57 PKD Participants and ePassports issuing States

Legend

- PKD Participants
- States issuing ePassports
- States issuing MRPs



**PKD
Membership
– 54 States +
3 entities**

- | | | | | | |
|-----------|-------------------|----------------------------|---------------------|--------------------|----------------------|
| Argentina | China | Iran (Islamic Republic of) | Netherlands | Russian Federation | Ukraine |
| Australia | Czech Republic | Ireland | New Zealand | Seychelles | United Arab Emirates |
| Austria | Finland | Japan | Nigeria | Singapore | United Kingdom |
| Belgium | France | Kazakhstan | Norway | Slovakia | United Nations |
| Benin | Georgia | Kuwait | Oman | Spain | United States |
| Botswana | Germany | Latvia | Peru | Sweden | Uzbekistan |
| Brazil | Hong Kong (China) | Luxembourg | Philippines | Switzerland | |
| Bulgaria | Hungary | Macao (China) | Qatar | Thailand | |
| Canada | Iceland | Malaysia | Republic of Korea | Turkey | |
| Colombia | India | Morocco | Republic of Moldova | Turkmenistan | |



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UNITING AVIATION

Thank you

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