

World Tourism Organization



# UNWTO

## Tourism Visa Openness Report

Updated for the  
5th T.20 Ministers' Meeting

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Tourism visa openness report

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# Tourism visa openness report

## Visa facilitation as means to stimulate tourism growth <sup>1</sup>

### Executive summary

#### Tourism visa around the world: 2013 snapshot

- In 2013, destinations around the world still require on average two thirds of the world's population to obtain a visa prior to departure. On the other hand, some 18% of the world's population was able to enter a destination without a visa, while another 15% could receive a visa on arrival.
- Globally there is a significant variety in visa policies, from countries allowing almost any citizen to enter freely to countries requesting visas indiscriminately.
- Overall, emerging economies tend to be more open than advanced ones.
- South-East Asian, East African, Caribbean and Oceanian destinations are among the most open regions while Central African, North African and North American destinations are the most restrictive regions.
- A total of 44 destinations significantly facilitated the visa process for citizens of 20 or more countries between 2010 and 2013, by changing their visa policies from "visa required" to either "eVisa", "visa on arrival" or "no visa required".
- Destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes. Out of the 5,930 total improvements, 5,180 were done by those countries which changed their visa policies significantly.
- The most popular facilitation measure was the introduction of "visa on arrival". Nearly 60% of all improvements done between 2010 and 2013 were from "visa required" to "visa on arrival".
- The reason for this remarkable and substantial improvement to facilitation between 2010 and 2013 is the determined action taken by governments.

#### Visa facilitation: 2008-2013

- Notable progress has been made in the area of visa facilitation in recent years.
  - While at the beginning of 2008, destinations requested from an average of 77% of the world's population to apply for a traditional visa prior to departure, this percentage went down to 64% in 2013.
  - In total, improvements of visa requirements were made in 5,930 destination-source market country pairs between 2010 and 2013.
- #### Methodological note
- UNWTO surveys visa policies around the world since 2008.
  - 2013 data was collected between January and July 2013. The process included a full review of official destination websites between January to May 2013, a verification of this information against secondary public sources and a detailed formal consultation process on the findings with all national tourism authorities between May and June of 2013.

<sup>1</sup> Report prepared by Dr. Dirk Glaesser and John Kester with valuable input from Márcio Favilla, Sandra Cãrvao, Lorna Hartantyo, Birka Valentin, Gordon Clark, Lisa Fürbaß, Pia Sabrina Funch, Natalie Wolf, Gaith Saqqa and Alberto G. Uceda.

## 1

### Introduction

#### The dimensions of international tourism

Over the past six decades, tourism has continued to expand and diversify; it is now one of the largest and fastest-growing economic sectors in the world. Many new tourist destinations have emerged alongside the traditional ones of Europe and North America. From 1980 to 2012, international tourist arrivals (i.e., overnight visitors) more than tripled worldwide, leaping from 279 million in 1980 to 1,035 million in 2012, corresponding to an average growth of 4.2% a year.

In the same period, the export value of tourism – that is, international tourism receipts, including international passenger transport – increased from US\$125 billion in 1980 to US\$1,075 billion in 2012. In real terms, this corresponds to an average growth of 4.1% a year, which is virtually the same pace as tourist arrivals.

According to the World Tourism Organization (UNWTO) long-term forecast *Tourism Towards 2030*, international tourist arrivals are expected to continue to grow at the sustained pace of 3.3% a year on average, reaching 1.8 billion by 2030.<sup>2</sup>

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4% a year) of advanced economy destinations (2.2% a year). As a result, arrivals in emerging economies are expected to surpass those in advanced economies by 2015 and by 2030, 57% of international tourist arrivals will occur in emerging-economy destinations (versus 30% in 1980 and 47% in 2010). Arrivals in advanced-economy destinations will make up 43% of arrivals overall (versus 70% in 1980 and 53% in 2010).

In order to fully reap the socio-economic benefits international tourism can bring to a country, it is necessary to put in place conditions that make the country competitive among which most importantly to make it easy to visit.

<sup>2</sup> World Tourism Organization (2011), *Tourism Towards 2030: Global Overview*, UNWTO, Madrid  
<sup>3</sup> See page 5.

## 2

### The functions of visas

Visa policies are among the most important governmental formalities influencing international tourism. The development of policies and procedures for visas, as well as for other important travel documents such as passports, is closely linked to the development of tourism. With the swift growth of international tourism in the last six decades, the quality, reliability, and functionality of visas and other travel documents has evolved. Only half a century ago, travel was heavily impacted by customs regulations, currency exchange limitations and visa formalities. A great deal of progress has been made in facilitation, which has contributed to the remarkable growth of the tourism sector. Especially noteworthy are the multilateral agreements that mutually exempt all or certain categories of travellers from the visa requirement. However, despite the progress made, namely in recent years, current visa policies are still often inadequate and inefficient, and are thus acknowledged to be an obstacle to tourism growth.

Visas perform several functions. They serve to ensure security; to control immigration and limit the entry, duration of stay, or activities of travellers; to generate revenue and apply measures of reciprocity; and to ensure a destination's carrying capacity and control tourism demand. Although 'security' is commonly stated to be the most important reason to impose a visa requirement, in practice, all the functions noted here can be observed, and form a reason to introduce or maintain a visa.

Travellers see visas mainly as a formality that imposes a cost. If the cost of obtaining a visa – either the direct monetary cost imposed in the form of fees or the indirect costs, which can include distance, time spent waiting in lines, and the complexity of the process – exceeds a threshold, potential travellers are simply deterred from making a particular journey or choose an alternative destination with less hassle. This finding is not new. It is interesting in this context to note that, in 1963, the delegates of 87 States agreed, at the United Nations Conference on International Travel and Tourism in Rome, that "Governments should extend to the maximum number of countries the practice of abolishing, through bilateral agreements or by unilateral decision, the requirement of entry visas for temporary visitors".<sup>3</sup>

## Visa facilitation

### Areas of opportunity

Joint research by the UNWTO and the World Travel & Tourism Council (WTTC), presented to the 4th T20 Ministers' Meeting in May 2012<sup>4</sup>, demonstrates that improving visa processes could generate an additional US\$ 206 billion in tourism receipts and create as many as 5.1 million jobs by 2015 in the G20 economies.<sup>5</sup>

The analysis also identified five important areas of opportunity for visa facilitation: delivery of information; current processes; differentiated treatment; the use of eVisa programmes; and regional agreements. These are detailed below.

#### Improve the delivery of information

The availability and reliability of the information on entry formalities – especially visa requirements and procedures – that destinations provide were among the simplest, but also least addressed, areas of opportunity. This information, especially the elements of entry formalities of importance to the traveller, should also be available in multiple languages.

#### Facilitate current visas processes

A major opportunity for improvement is the way visa requests for temporary visitors are processed in general as well as the requirements linked to this process. Whether these requirements are personal interviews, official documents or certificates, they usually produce at least temporary bottlenecks as well as uncertainty and long wait times. Among the techniques suitable for improving these processes are the better use of modern information technologies by service providers and the consideration of visas on arrival.

#### Differentiate treatment to facilitate tourist travel

The technique of facilitating the visa process for certain types of visitors is widely used among countries, especially for temporary visitors who are visiting for tourism purposes. The form this facilitation takes can range from easing restrictions depending on the means of transportation – for example, cruise passengers can be allowed to disembark from the ship without a tourist visa or to arrive by charter planes – to special treatment for specified geographical areas or ports of entry.

#### Institute eVisa programmes

Currently, a widely discussed opportunity is the use of eVisa. If an entry visa cannot be avoided, eVisa is the option preferred over the traditional, paper visa. It can be more easily obtained and requires neither the physical presence of the applicant nor the presence of the passport. These considerations are especially important for destinations without a widespread network of embassies and consulates.

#### Establish regional agreements

There are already a number of regional agreements in place that allow travellers from a third country to move freely between member countries once admitted by one of the participating countries. For citizens of one of the Member States of some regions, such as the Schengen area in Europe, it is even possible to travel without a passport by simply using a valid national document of identification.

3. (pg 4) United Nations Conference on International Travel and Tourism (1964), *Recommendations on International Travel and Tourism*, August 21–September 5, 1963. Rome

**States represented at the conference were:** Afghanistan, Algeria, Argentina, Australia, Austria, Belgium, Bolivia, Brazil, Bulgaria, Byelorussian Soviet Socialist Republic, Cambodia, Cameroon, Canada, Ceylon, Chad, Chile, China, Colombia, Congo (Leopold-Ville), Costa Rica, Cuba, Cyprus, Czechoslovakia, Denmark, Dominican Republic, El Salvador, Federal Republic of Germany, Finland, France, Greece, Guatemala, Holy See, Hungary, India, Indonesia, Iran, Iraq, Ireland, Israel, Italy, Japan, Jordan, Kuwait, Lebanon, Liberia, Libya, Luxembourg, Madagascar, Mali, Mexico, Morocco, Nepal, Netherlands, New Zealand, Niger, Nigeria, Norway, Pakistan, Paraguay, Peru, Philippines, Poland, Portugal, Republic of Korea, Romania, San Marino, Saudi Arabia, Senegal, Somalia, Republic of South Africa, Spain, Sudan, Sweden, Switzerland, Syria, Thailand, Trinidad and Tobago, Tunisia, Turkey, Uganda, Ukrainian Soviet Socialist Republic, Union of Soviet Socialist Republics, United Arab Republic, United Kingdom of Great Britain and Northern Ireland, United States of America, Venezuela and Yugoslavia. UN Specialized Agencies: FAO, UNESCO, ICAO, WHO, IMCO.

4. The T20 Ministers refers to the Tourism Ministers of the G20 economies. The G20 economies are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, the Republic of Korea, Russia, Saudi Arabia, South Africa, Spain, Turkey, the United Kingdom and the United States.

5. World Tourism Organization and World Travel & Tourism Council (2012), *The Impact of Visa Facilitation on Job Creation in the G20 Economies*, UNWTO and WTTC, Madrid and London.

## The global and regional dimensions to visas

As a positive outcome of the UNWTO/WTTC report on the impact of visa facilitation on the G20 economies, G20 leaders recognized, at their June 2012 Summit, the role of tourism as “a vehicle for job creation, economic growth and development”.<sup>6</sup> Furthermore, they committed to “work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth”.<sup>7</sup>

This position and other measures taken by regional blocks and individual countries to facilitate tourism visa are much welcome

news; yet despite of these many strides, visa requirements still affect global tourism significantly. In 2013, destinations around the world requested, on average, that 64% of the world's population obtain a visa before initiating an international journey. Another 3% of the population was at least allowed to apply for an eVisa<sup>8</sup>, while 15% would be able to apply for a visa on arrival. Only 18% of the world's population would not require a visa at all when traveling for tourism purposes (table 1).

Table 1 ▼

### Subregions of destinations by percentage of world population affected by visa policies, 2013

	Openness <sup>a</sup>	% of world population affected by visa policies			
		No visa	Visa on arrival	eVisa	Visa required <sup>b</sup>
<b>World</b>	30	18%	15%	3%	64%
Advanced economies <sup>c</sup>	26	24%	1%	3%	72%
Emerging economies <sup>c</sup>	31	17%	19%	3%	62%
<b>By UNWTO regions:</b>					
<b>Africa</b>	29	9%	28%	1%	62%
North Africa	14	14%	1%	0%	85%
West Africa	23	7%	23%	0%	70%
Central Africa	5	2%	0%	7%	91%
East Africa	50	8%	60%	0%	32%
Southern Africa	25	25%	0%	0%	75%
<b>Americas</b>	36	32%	5%	1%	62%
North America	14	11%	0%	6%	83%
Caribbean	41	39%	2%	1%	58%
Central America	36	31%	8%	0%	62%
South America	36	29%	9%	0%	62%
<b>Asia and the Pacific</b>	37	20%	20%	6%	54%
North-East Asia	29	26%	4%	1%	69%
South-East Asia	50	25%	30%	6%	38%
Oceania	41	25%	18%	6%	51%
South Asia	26	4%	23%	11%	62%
<b>Europe</b>	24	21%	3%	2%	74%
Northern Europe	23	23%	0%	0%	77%
Western Europe	23	23%	0%	0%	77%
Central/Eastern Europe	24	16%	8%	5%	71%
Southern/Mediter. Europe	25	25%	0%	1%	74%
- of which EU-28 <sup>d</sup>	22	22%	0%	0%	77%
<b>Middle East</b>	19	1%	20%	7%	72%

Source: Data compiled by UNWTO based on information of national official institutions.

**a.** Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0. For the (sub)regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by natural logarithm of the population size (i.e.  $\ln((1,000 \text{ population}))$ ) in order to take into account differences in destination size).

**b.** Visa required means that a visa has to be obtained prior to departure and is not an electronic visa (eVisa).

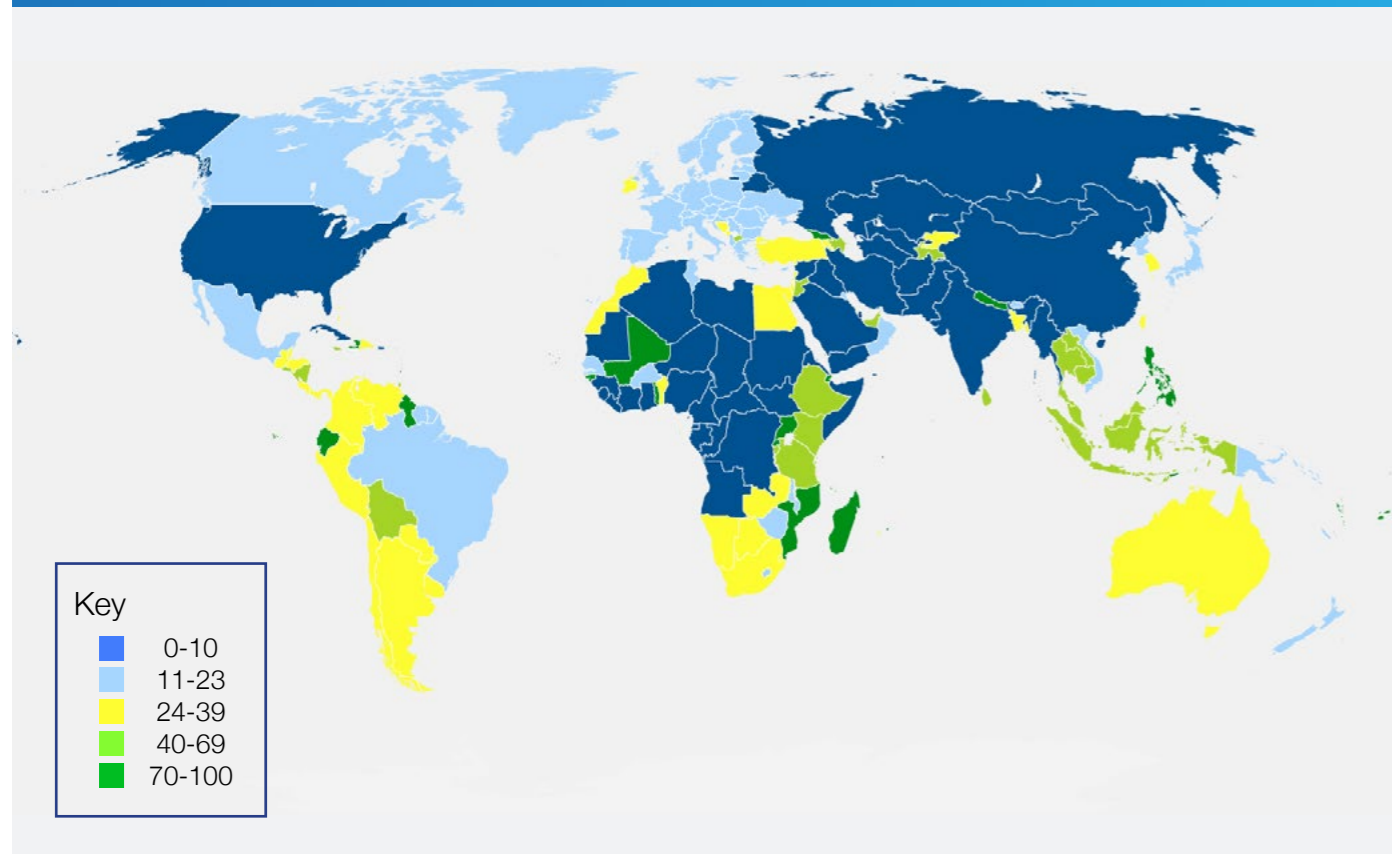
**c.** Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

**d.** The EU-28 countries are Austria, Belgium, Bulgaria, Cyprus, Czech Rep., Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Ireland, Romania, the Slovak Republic, Slovenia, Spain, Sweden; United Kingdom and Croatia.

**6. 7. & 8. :** See page 7



## Tourism visa openness index by region, 2013



Note: The higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world's population exempt from obtaining a visa, with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.

Source: Data compiled by UNWTO based on information of national official institutions.

Disclaimer: The maps elaborated by UNWTO are for reference only and do not imply any judgement on the legal status of any territory, or any endorsement or acceptance of such boundaries.

### Emerging economies continue to be, in 2013, more open in terms of travel requirements than advanced ones (table 1)<sup>9</sup>.

When traveling to an emerging-economy destination, on average, 62% of the world's population needs a traditional visa and 3% an eVisa; for advanced-economy destinations, 72% needs a traditional visa and 3% an eVisa. However, full exemption from a visa is more common in advanced economies (24% versus 17%), whereas in emerging economies obtaining a visa on arrival is much more common (19% versus 1%).

### From a regional perspective, destinations in Asia and the Pacific have facilitated international travel the most. To

visit Asia and the Pacific, 20% of the world's population does not require a visa, another 20% could obtain a visa on arrival, and 6% could use an eVisa. Southeast Asia is, together with East Africa, the most open subregion because of the large number of visa on arrival requirements (this is sufficient for 30% of the world's population on average) and the considerable number of visa exemptions (25%) and eVisa alternatives (6%).

When traveling to the **Americas**, 62% of the world's population is required to obtain a traditional visa prior to departure. However, this figure varies widely across the subregions of the Americas. While North America is one of the more restricted subregions, where only 11% of the world's population can enter without a visa, the Caribbean is, together with Oceania, the second most open subregion in the world: 39% of the world's population can enter without a visa and 2% has the ability to obtain a visa on arrival. Destinations in the two other subregions – Central and South America – also abolished visas for a comparatively high number of source markets, making the Americas the leading region in terms of visa exemptions (32% of the world's population does not need a visa to visit the Americas; see table 1).

**Africa** requires a visa prior to departure from 62% of the world's population, but, at the same time, has the highest percentage of countries whose visitors are able to obtain a visa on arrival (28%). However, this figure varies significantly across the African subregions. In Central Africa, the use of traditional visas – required for 91% of the world's population – is highest of all Africa's subregions. East Africa, in contrast, has the lowest in the world: only 32% of the world's population is required to have traditional visas. Visa on arrival is popular in East Africa (60%), making East Africa together with South-East Asia the second most open subregions in the world.

In the **Middle East**, 72% of the world's population is required to obtain a traditional visa prior to departure to any of its destinations, but 20% are allowed to obtain a visa on arrival and 7% to use an eVisa. Interestingly, the Middle East has the highest percentage of the world's population able to apply for an eVisa. At the same time, however, the abolishment of any visa is the lowest among all five regions, with only 1% of the world population not required to obtain a visa of any kind.

**European destinations are among the more restrictive, requiring, on average, 74% of the world's population to obtain a visa before departure, while 21% is not required to obtain a visa and 3% can obtain it on arrival. All four European subregions show more or less comparable patterns.**

### In summary

- Visa exemption is most common in the Caribbean (39%) and in Central America (31%);
- Visa on arrival is comparatively common in East Africa (60%) and Southeast Asia (30%);
- eVisa is particularly popular in South Asia (11%), the Middle East (7%) and Central Africa (7%);
- Traditional visas are most prevalent in Central Africa (91%), North Africa (85%), and North America (83%), followed by the four European subregions, Southern Africa and the Middle East (all 70% or higher).

Least restrictive destinations		
	Name of destination	Openness <sup>a</sup>
1	Cook Islands	100
	Dominica	100
	Micronesia, Federated States of	100
	Niue	100
5	Haiti	99
6	Macao (China)	85
7	The Philippines	84
8	Georgia	80
	Hong Kong (China)	80
	Mauritius	80
	Turks and Caicos Islands	80
12	Fiji	78
13	Guyana	76
	Montserrat	76
	Seychelles	76
	Saint Vincent and the Grenadines	76
17	Vanuatu	75
18	Rwanda	73
19	Ecuador	72
	Mali	72
21	Cape Verde	71
	Guinea-Bissau	71
	Mozambique	71
	Nepal	71
	Togo	71
	Uganda	71

Source: Data compiled by the UNWTO, based on information of national official institutions.

a. Scores range from 0 to 100; the higher the score, the better. Destinations with the same score are tied, and so have the same rank; these appear in alphabetical order in the table. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa, with the percentages of visa on arrival weighted by 0.7 and eVisa by 0.5.

6. World Tourism Organization and World Travel & Tourism Council (2012), *The Impact of Visa Facilitation on Job Creation in the G20 Economies*, UNWTO and WTTC, Madrid and London, Pages 17-18.

7. World Travel & Tourism Council (2012), *G20 Recognizes Travel & Tourism as a Driver of Economic Growth for the First Time and Commit to Work on Travel Facilitation*, June 20, available: <http://www.wttc.org/news-media/news-archive/2012/g20-recognises-travel-tourism-driver-economic-growth-first-time/>.

8. In 2012, eVisas were accounted for separately for the first time. In 2008 and 2010, eVisas and visas on arrival belonged to the same category.

9. Weighting is as follows: visa not required = 1, visa on arrival = 0.7, eVisa = 0.5. Data for regions and subregions are average data and might not fully reflect the situation for all countries, especially in less homogenous subregions such as Africa, South Asia, and Central and Eastern Europe.

# Reciprocity

In 2013, 16% of all visa policies analyzed were mutually open, while 36% of the policies were mutually closed. Furthermore, in 2% of the pairs, both countries had visa on arrival, while in less than 1% of the pairs<sup>10</sup>, both countries had an eVisa. The remaining 46% were non-reciprocal combinations.

Between 2008-2013, reciprocally open policies, i.e. both countries do not require each other's citizens to obtain a visa, have slightly increased from 14% of all pairs to 16%. In the same period, reciprocally closed policies, i.e. both countries do require each other's citizens to obtain a visa, have considerably decreased to 36% down from 57%. However, the biggest shift has been observed in other combinations (29% to 46%) where countries have unilaterally opened up by introducing no visa required, visa on arrival or eVisa.

Analyzing openness while taking also into account the stage of economic development, the following observations can be made for 2013:

Advanced economies have among each other a high level of reciprocity in openness with 89% reciprocity of no visa

required. Only in 11% of the pairs, no visa is required by one country, while a traditional visa, an eVisa, or visa on arrival is required by the other (of which only eleven cases where a traditional visa is required).

However, a negative reciprocity is dominating relationships between emerging economies with 41% of mutual policies requiring a visa, while 21% of policies are reciprocally open and in 3% both countries issue a visa on arrival. Of the asymmetric policies, most common is a visa on arrival on one end and a traditional visa on the other (24%). A unilateral exemption on one end and traditional visa on the other can be observed in 11% of the pairs.

In the case of relationships between emerging and advanced economies, in 20% of country pairs policies are reciprocally open and in 30% visa is required on both ends. In 22% of the pairs, emerging economies issue a visa on arrival, while advanced economies require traditional visa. In 19% of the pairs, the emerging economy has unilaterally exempted the need for a visa, while the advanced economy requires a traditional visa.

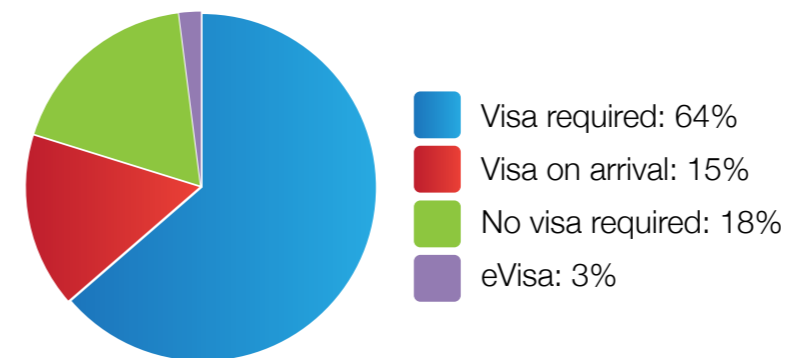
## Visa facilitation reciprocity for travel within and between the groups of advanced and emerging economies, 2013

		Travel between							
		Total	Advanced economies		Emerging economies		Emerging and advanced economies		
Total		18.915	100	741	100	12.090	100	6.084	100
		(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Reciprocal	No visa	10.294	54	661	89	6.572	54	3.061	50
	Visa on arrival	422	2	-	-	397	3	25	0
	eVisa	12	0	1	0	9	0	2	0
	Visa	6.801	36	-	-	4.987	41	1.814	30
Not reciprocal	No visa	8.621	46	80	11	5.518	46	3.023	50
	Visa on arrival	2.535	13	11	1	1.351	11	1.173	19
	eVisa	4.263	23	-	-	2933	24	1330	22
	No visa	693	4	-	-	506	4	187	3
	Visa on arrival	177	1	66	9	94	1	17	0,3
	No visa	150	1	-	-	139	1	11	0,2
	Visa on arrival	509	3	3	0,4	495	4	11	0,2
	No visa	76	0,4	-	-	-	-	76	1
	Visa on arrival	74	0,4	-	-	-	-	74	1
	eVisa	15	0,1	-	-	-	-	15	0,2
	No visa	6	0,0	-	-	-	-	6	0,1
	Visa on arrival	3	0,0	-	-	-	-	3	0,0
No visa	120	0,6	-	-	-	-	120	2	

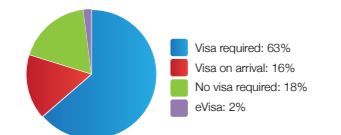
Source: World Tourism Organization (UNWTO) ©  
 Note: Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

# Progress in recent years

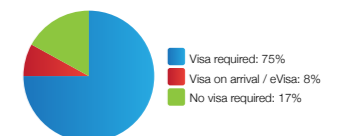
2013 - World population affected by visa policies



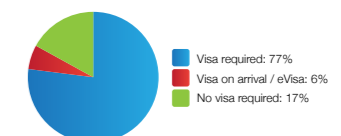
2012 - World population affected by visa policies



2010 - World population affected by visa policies



2008 - World population affected by visa policies



World Reciprocity	2008	2010	2012	2013	2013 / 2008 Change (% pts.)
% Reciprocal	71%	68%	54%	54%	-17%
% Reciprocally 'no visa required'	14%	16%	16%	16%	+2%
% Reciprocally 'visa required'	57%	52%	35%	36%	-21%
% Reciprocally 'visa on arrival' or 'eVisa'	0%	0%	3%	2%	+2%
% Not reciprocal	29%	32%	46%	46%	+17%

10. For this analysis of reciprocity, data has been used on 37,830 country pairs in total (195\*195-195) for the four years 2008, 2010, 2012 and 2013. As each pair is combined with its reciprocal (for instance China-France with France-China) there is consequently only half the number of reciprocal pairs (i.e. 18,915).

Looking into the evolution of visa formalities in recent years, **data shows a recent and strong tendency toward visa facilitation.** At the beginning of 2008, destinations around the world required, on average, 77% of the world's population to obtain a traditional visa before visiting; this percentage went down to 75% in 2010 and further down to 64% in 2013 (Figure 1).

The reason for this remarkable and substantial improvement to facilitation between 2010 and 2013 is the determined action taken by governments. **In total, visa requirements were facilitated for 5,930 destination-source market pairs between 2010 and 2013** (table 3). Destinations facilitated the visit of citizens of another country by either simply abolishing the visa requirement altogether, or allowing a visa to be obtained on arrival or in electronic form (eVisa).

**A total of 44 destinations significantly facilitated travel for citizens of 20 or more countries by changing their visa policies from visa required to eVisa, visa on arrival, or no visa required.** These 44 destinations introduced a total of 5,180 individual measures and contributed by far the majority of the 5,930 total improvements introduced by all destinations between 2010 and 2013. This significant improvement demonstrates that destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes.

**Analyzing all facilitation techniques, the most common change was from visa required to visa on arrival, which represented nearly 60% of all changes.** Although eVisa and similar measures were also introduced, their importance was still minor in comparison to the other facilitation measures.

### Destinations which improved visa procedures for 20 or more countries of origin (2010-2013)

Number	Destination	Number of improvements
1	Niue	195
2	Micronesia, Federates States of	194
3	Palau	194
4	Sao Tome and Principe	194
5	Djibouti	192
6	Haiti	191
7	Mozambique	189
8	Azerbaijan	181
9	Rwanda	181
10	Guinea-Bissau	180
11	Burundi	179
12	Togo	179
13	Cape Verde	178
14	Mali	172
15	Uganda	161
16	Guyana	157
17	Lao (P.D.R.)	144
18	United Arab Emirates	141
19	Kenya	140
20	United Republic of Tanzania	128
21	Ecuador	127
22	Bolivia	123
23	Macao (China)	120
24	Armenia	119
25	Sri Lanka	116
26	Georgia	111
27	Nicaragua	108
28	Montserrat	91
29	Tajikistan	79
30	Mauritius	75
31	Bonaire	57
32	Zambia	57
33	Bangladesh	55
34	Kyrgyzstan	52
35	Cayman Islands	51
36	Panama	50
37	French Polynesia	47
38	Saint Lucia	47
39	Nauru	45
40	Burkina Faso	37
41	Ethiopia	35
42	New Caledonia	34
42	Trinidad and Tobago	27
43	Australia	25
44	Swaziland	22

<b>Subtotal</b>	5180
Other destinations	750
<b>Total positive changes made between 2010 and 2013</b>	<b>5930</b>

Source: Data compiled by the UNWTO, based on information from national official institutions.  
 Note: An improvement is the facilitation of a visa formality by either simply abolishing the traditional paper visa or allowing an eVisa or visa on arrival. Each destination-country of origin pair is calculated.

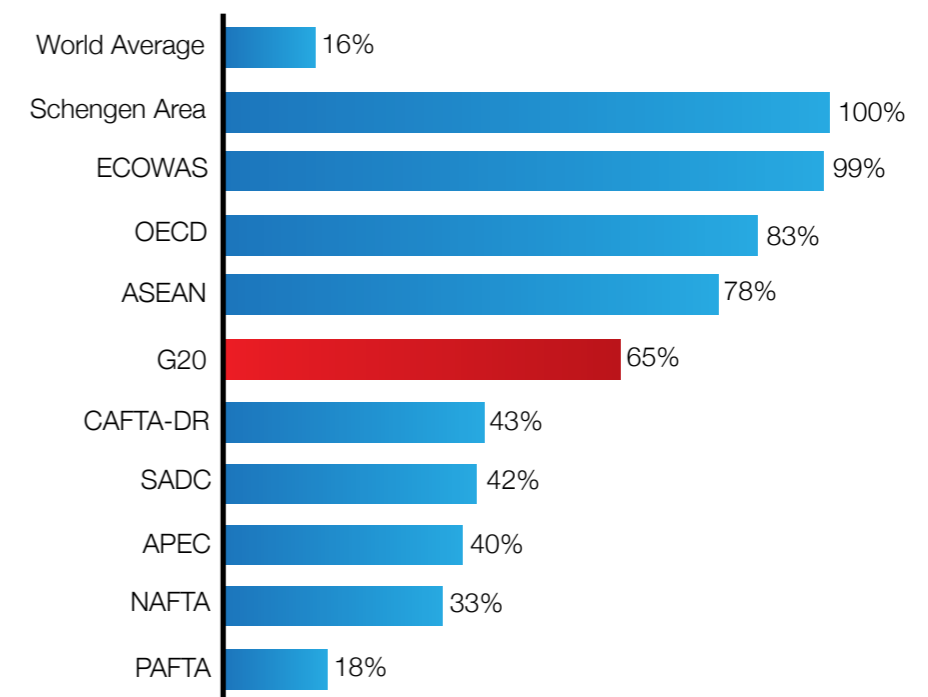
## 7

### Focus on regional and economic blocs

When analyzing regional and economic blocs, in general higher levels of reciprocal visa exemptions between the members of these economic blocs than the world average can be observed. Very high levels of open reciprocity exist, for example, between the members of the Schengen Area (100% open reciprocity among

the members), ECOWAS (99%) and OECD (83%). Members of the G20 have, with 65% of policy pairs being reciprocally open, still a high level of open reciprocity, which is four times higher than the world average of 16%.

#### Open reciprocity among members of selected regional and economic blocs, 2013



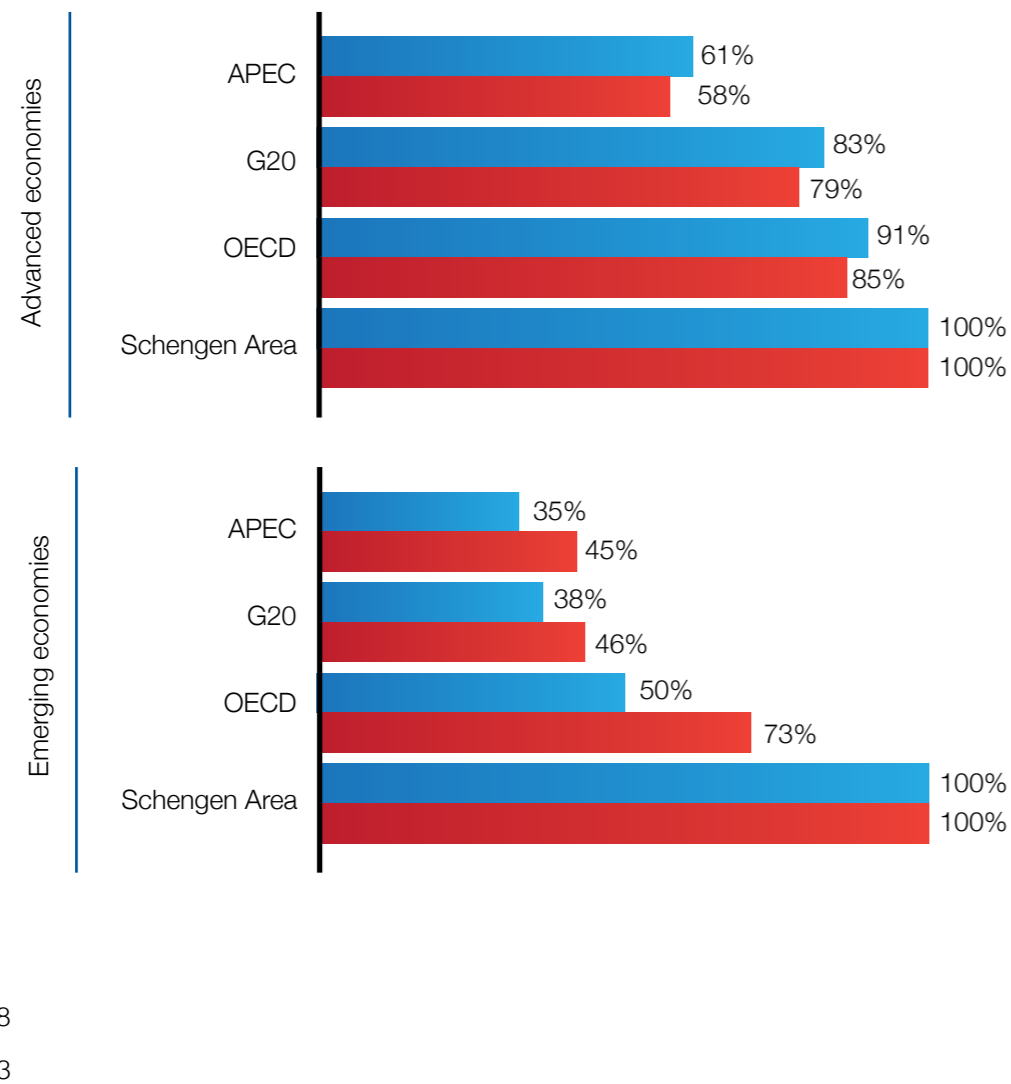
Besides the 65% of open reciprocal visa policies within G20 in 2013, only 18% of the policies are mutually closed with both countries requiring visas while the remaining 17% of policy pairs are non-reciprocal combinations. Despite the fact that the

amount of mutually open visa policy pairs within G20 remained the same between 2008 and 2013, mutually closed visa policies decreased slightly by 2%.

When looking at the 2013 world average open reciprocity for advanced and emerging economies, all advanced economies within selected economic blocs (excluding the Schengen Area) show a lower level of mutually open visa policies. While the world average for mutually open policies between advanced economies is 89%, among advanced economies of economic

and regional blocs, open reciprocity ranges from 58% to 100%. In contrast, only 10% of all emerging economies' visa policies around the world are reciprocally open in 2013, while mutual open reciprocity among emerging economies within the regional and economic blocs ranges from 45% to 100%.

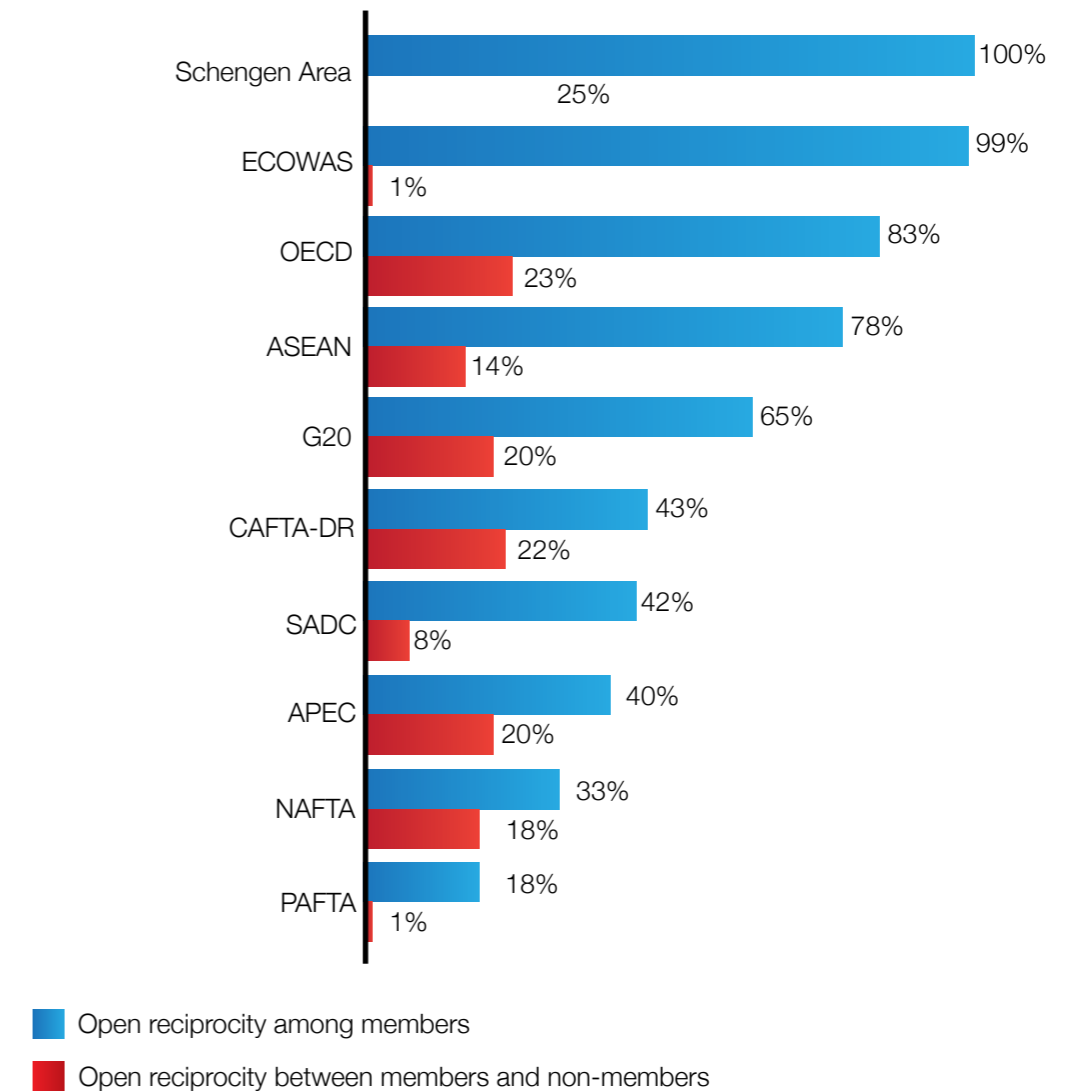
### Developments in open reciprocity among advanced and emerging economies within selected regional and economic blocs, 2008 - 2013



Looking at the G20 facilitation measurements in detail, it becomes clear that, although open reciprocity among members remained the same with 65%, the percentage of open reciprocal visa policies between emerging member economies increased from 38% to 46% between 2008 and 2013, while this percentage for

advanced economies decreased slightly from 83% to 79%. This observation can also be seen within APEC, for example, where emerging economies increased their open reciprocity from 35% to 45%, while advanced economies decreased their mutually open visa policies from 61% to 58%.

### Open reciprocity among members and between members and non-members of regional and economic blocs, 2013



In addition, it is interesting to note that the benefits of visa facilitation taking place within economic and regional blocs are not limited to the members but also affect the relationship with non-members. At 20% open reciprocity between members and non-members, G20's open reciprocity to non-members is still

above the world average of 16%. Similar observations can be made for Schengen (25%), OECD (23%), CAFTA-DR (22%), G20 and APEC (both 20%) and NAFTA (18%), indicating that priority actions within regional or economic cooperation blocs also positively impact the relationship with other economies.



## Outbound potential and visas

Citizens around the world are differently affected by visa policies. While some countries' citizens enjoy enormous advantages as they are hardly requested to obtain visa, neither traditional nor upon arrival, others are constantly faced with the challenge of obtaining visa before departing from their own country. However, when comparing data of 2013 and 2008 the total mobility score improved for citizens of all countries without exception. This indicates that, though at different levels, tourists are experiencing more mobility.

The following table lists those citizens which have enjoyed the highest levels of mobility in 2013. They can travel to 75% of the worlds' destinations without requiring a visa prior to departure.

Interestingly, when comparing data between 2013 and 2008 for the promising outbound markets of Brazil, Russia, China, India and South Africa (BRICS), it becomes clear that destinations are making special efforts to facilitate visa formalities for tourists originating from these prospering economies. Russian and Chinese citizens were benefitting the most from these newly introduced visa facilitation measures comparing 2013 and 2008 data. Brazilians, already enjoying a high level of mobility, continued improving further.

Data indicates that destinations competing for these fast growing outbound markets use visa facilitation as a means to increase their competitive advantage.

### Countries whose citizens are affected the least by visa restrictions

	Most mobile citizens 2013	Mobility
1	Finland	158
2	Denmark	157
	Sweden	157
4	United Kingdom	156
	Germany	156
6	United States of America	155
	The Netherlands	155
	Ireland	155
	France	155
	Belgium	155
	Portugal	155
	Singapore	155
	Spain	155
14	Luxembourg	154
	Norway	154
	Austria	154
	Italy	154

Source: Data compiled by the UNWTO, based on information from national official institutions.  
 Note: Mobility indicates to what extent citizens around the world are affected by visa policies.  
 The higher the score, the better. It is calculated by summing travel visa policies required of each country's citizens with weights of 0.7 for visa on arrival and 0.5 for eVisa.

## Outlook

In 1963, the United Nations Conference on International Travel and Tourism stressed the dependency of tourism development on the actions of governments, especially the facilitation of governmental formalities for international travel. Fifty years later, in November 2012, the UNWTO/World Travel Market Ministers' Summit in London concluded that visa processes and policies still present major barriers to travel and tourism. The Summit noted that restrictive visa-issuance policies and complicated entry formalities are still stifling tourism growth, particularly from emerging economies, which are also some of the fastest-growing source markets for tourism.

However, it is also evident that the link between visa facilitation and economic growth through tourism is increasingly recognized by national authorities, which have accompanied such recognition with concrete facilitation measures. The clear and strong tendency to ease visa procedures first observed during the period 2010-12, continued in 2013 and is likely to continue in the future.

UNWTO will continue to promote and advocate for visa facilitation to support economic growth and development through tourism. As requested by the 94th session of the UNWTO Executive Council (October 2012) UNWTO has

prioritized visa facilitation within its work. In cooperation with the International Civil Aviation Organization (ICAO), the Organisation for Economic Co-operation and Development (OECD), the Asia-Pacific Economic Cooperation (APEC), the World Travel & Tourism Council (WTTC) and other partners, UNWTO will continue to provide case studies, evidence of the relationship between visa facilitation and tourism growth as well as benchmarking information to support this important process of visa facilitation for tourism.

Mobility - BRICS Countries	2008	2010	2012	2013	2013 / 2008 Change (%)
<b>World average</b>	<b>63</b>	<b>69</b>	<b>85</b>	<b>83</b>	<b>32%</b>
Advanced economies	129	134	151	150	16%
Emerging economies	49	56	71	70	41%
Brazil	103	112	141	141	37%
The Russian Federation	43	57	80	82	92%
India	34	37	51	49	44%
China	24	26	43	40	67%
South Africa	75	76	85	82	10%

Note: For this analysis of reciprocity, data from 37,830 country pairs in total (195\*195-195) has been used for the four years 2008, 2010, 2012 and 2013. As each pair is combined with its reciprocal (for instance China-France with France-China) there are consequently only half the number of reciprocal pairs (i.e. 18,915).

# Selected regional and economic blocs

## Overview regional and economic blocs

<b>APEC</b> (Asia-Pacific Economic Cooperation)	21 member economies	Australia, Brunei Darussalam, Canada, Chile, China, Hong Kong (China), Indonesia, Japan, Republic of Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan (Province of China), Thailand, United States of America, Vietnam
<b>ASEAN</b> (Association of Southeast Asian Nations)	10 member economies	Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam
<b>CAFTA-DR</b> (Dominican Republic - Central American Free Trade Agreement)	7 member economies	Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Dominican Republic, United States of America
<b>ECOWAS</b> (Economic Community of West African States)	15 member economies	Benin, Burkina Faso, Cape Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Côte d'Ivoire, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo
<b>G20</b>	21 member economies	Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, Republic of Korea, Turkey, United Kingdom, United States of America, Spain*, European Union**
<b>NAFTA</b> (North American Free Trade Agreement)	3 member economies	Canada, United States of America, Mexico
<b>OECD</b> (Organisation for Economic Co-operation and Development)	27 member economies	Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Republic of Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia
<b>PAFTA</b> (Pan-Arab Free Trade Area)	17 member economies	Egypt, United Arab Emirates, Bahrain, Jordan, Tunisia, Saudi Arabia, Sudan, Syrian Arab Republic, Iraq, Oman, Palestine, Qatar, Kuwait, Lebanon, Libyan Arab Jamahiriya, Morocco, Yemen
<b>SADC</b> (Southern African Development Community)	14 member economies	Angola, Botswana, Democratic Republic of the Congo, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia, Zimbabwe
<b>Schengen Area</b>	26 member economies	Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland

\*Spain is a permanent G20 invitee and also included in the report.

\*\* For the report, the EU was defined as the EU countries which have fully implemented the Schengen Agreement, i.e., all EU countries except Ireland, UK, Bulgaria, Cyprus and Romania.





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