



## **UNWTO Commission for Africa**

Fifty-eighth meeting  
Abidjan, Cote d'Ivoire  
Provisional agenda item 3

CAF/58/3  
Madrid, March 2016  
Original: English

### **Item 3 of the provisional agenda**

#### **Report of the Secretary-General**

#### **Note by the Secretary-General**

In this document, the Secretary-General presents to the Members of the UNWTO Commission for Africa his review of major tourism trends, UNWTO's management vision and priorities as well as the status and advances in the administrative and financial matters of the Organization.

## **Report of the Secretary-General**

### **Introduction**

---

1. The present report to the 58<sup>th</sup> Meeting of the UNWTO Commission for Africa addresses the following subjects:
  - A. International Tourism in 2015 and 2016;
  - B. Mainstreaming Tourism in the Global Agenda;
  - C. Key UNWTO activities in Africa
  - D. Administrative and Financial Matters.

### **A. International Tourism in 2015 and 2016**

---

2. Demand for international tourism remained strong in 2015 according to the 2016 January issue of the UNWTO World Tourism Barometer. The number of international tourists (overnight visitors) reached 1,184 million, 50 million more than in 2014. With an increase of 4.4%, this was the sixth consecutive year of above-average growth since the 2009 global economic crisis.
3. As in recent years, the growth in international tourism receipts in 2015 is expected to have followed that of arrivals fairly closely (the 2015 results for international tourism receipts will be released at the end of April 2016).
4. Europe (+5%) led growth in absolute and relative terms supported by a weaker euro vis-à-vis the US dollar and other main currencies. Arrivals reached 609 million, or 29 million more than in 2014. Central and Eastern Europe (+6%) rebounded from last year's decrease in arrivals. Northern Europe (+6%), Southern Mediterranean Europe (+5%) and Western Europe (+4%) also recorded sound results, especially considering the many mature destinations they comprise.
5. Asia and the Pacific (+5%) recorded 13 million more international tourist arrivals last year to reach 277 million, with uneven results across destinations. Oceania (+7%) and South-East Asia (+5%) led growth, while South Asia and in North-East Asia recorded an increase of 4%.
6. International tourist arrivals in the Americas (+5%) grew 9 million to reach 191 million, consolidating the strong results of 2014. The appreciation of the US dollar stimulated outbound travel from the United States, benefiting the Caribbean and Central America, both recording 7% growth. Results in South America and North America (both at +4%) were close to the average.
7. International tourist arrivals in the Middle East grew by an estimated 3% to a total of 54 million, consolidating the recovery initiated in 2014.
8. Limited available data for **Africa** points to a 3% decrease in international arrivals, reaching a total of 53 million.

9. In North Africa arrivals declined by 8% and in Sub-Saharan Africa by 1%, though the latter returned to positive growth in the second half of the year. (Results for both Africa and Middle East should be read with caution as it is based on limited available data)
10. As for outbound tourism as measured by international tourism expenditure, available data for 2015 a few leading source markets, namely China, the USA and the UK, drove tourism expenditure in 2015 supported by a strong currency and economy.
11. Among the world's top source markets, China, with double-digit growth in expenditure every year since 2004, continues to lead global outbound travel, benefitting Asian destinations such as Japan and Thailand, as well as the United States and various European destinations.
12. By contrast, expenditure from the previously very dynamic source markets of the Russian Federation and Brazil declined significantly, reflecting the economic constraints in both countries and the depreciation of the rouble and the real against virtually all other currencies.
13. As for the traditional advanced economy source markets, expenditure from the United States (+9%), the world's second largest source market, and the United Kingdom (+6%) was boosted by a strong currency and rebounding economy. Spending from Germany, Italy and Australia grew at a slower rate (all at +2%), while demand from Canada and France was rather weak.
14. For 2016, UNWTO forecasts international tourist arrivals to grow between 3.5% and 4.5% in view of current trends and the results from the UNWTO Confidence Index which remain largely positive for 2016, though at a slightly lower level as compared to the previous two years.
15. By region, growth is expected to be stronger in Asia and the Pacific (+4% to +5%) and the Americas (+4% to +5%), followed by Europe (+3.5% to +4.5%). The projections for Africa (+2% to 5%) and the Middle East (+2% to +5%) are positive, though with a larger degree of uncertainty and volatility.
16. Several factors add increased volatility to current prospects, including ongoing geopolitical tensions, security concerns, strong currency fluctuations, unexpected stock market and financial flow movements, significant drop in commodity prices, including oil, and a slower than expected growth, namely in emerging economies.
17. Considering that this document was prepared in March 2016, updated information on international tourism results in 2016, particularly on the performance of Africa, will be provided verbally to the 58<sup>th</sup> Meeting of the Commission for Africa.

## **B. Mainstreaming Tourism in the Global Agenda**

---

18. The **UNWTO/WTTC Open Letter on Travel and Tourism** campaign continues to advance. Since its inception in 2011, a total of 82 Heads of State and Government have been presented with the Open Letter. The initiative aims to promote the role of the sector at the highest level, foster cross-cutting policy coordination on tourism issues and raise awareness among decision makers of pressing challenges facing the sector. In Africa, a total of 17 countries have so far adhered to this initiative (by date of acceptance: South Africa, Burkina Faso, Kenya, Mozambique, The Islamic Republic of The Gambia, Seychelles, Tunisia, Zimbabwe, Zambia, Tanzania, Algeria, Rwanda, Uganda, Angola, Ethiopia, Morocco and Ghana).

19. The sixth **T.20 Ministers' Meeting** was held in the Republic of Turkey on 29-30 September 2015. As per the priorities of the Turkish G20 Presidency, the meeting discussed how tourism can address the challenge of a 'jobless recovery', with a particular focus on policies that promote gender equality, youth unemployment, skills adequacy, entrepreneurship, and investment. To that end, UNWTO and the International Labour Organization (ILO) prepared a background document and a communique which was integrated as an annex to the G20 Leaders Declaration (see <http://g20.org.tr/g20-ministers-of-tourism-discuss-how-tourism-can-create-more-and-better-jobs>).

Africa was represented in the meeting by South Africa as a member of the G20 and by Zimbabwe as chair of the African Union.

The **seventh Meeting of the G20 Tourism Ministers** will be held in Beijing, China on 20 May 2016 in the framework of the Chinese Presidency of the G20 and coinciding with the First World Conference on Tourism for Development organized by UNWTO and the Government of the People's Republic of China. The Meeting will focus on the theme of 'Sustainable Tourism – An Effective Tool for Inclusive Development'.

20. The Secretariat continues to work to position tourism higher in the United Nations system agenda as well as that of other relevant international and regional organizations. In this framework, it is worth highlighting:

(a) Inclusion of tourism in the **Sustainable Development Goals (SDGs)**: As a result of concerted efforts of the UNWTO Secretariat and Member States, tourism is included as a target under three of the SDGs - SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all; SDG 12: Sustainable Consumption and Production and SDG 14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development. The tourism targets are specially:

- Target 8.9: 'By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products';
- Target 12.b: 'Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products'; and
- Target 14.7: 'By 2030, increase the economic benefits to small island developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism'.

Nonetheless, it is important to stress that given its cross-cutting nature tourism is well positioned to contribute to all of the 17 SDGs (for more information on tourism and the SDGs see <http://icr.unwto.org/content/tourism-and-sdgs>).

UNWTO is also an observer to the Inter-agency Expert Group on SDG Indicators which has produced a proposal of indicators to measure the SDGs targets (see <http://unstats.un.org/unsd/statcom/47th-session/documents/2016-2-SDGs-Rev1-E.pdf>)

(b) The preparation for the celebrations of **2017 as the International Year of Tourism for Development and Peace**: The United Nations (UN) General Assembly has approved the adoption of 2017 as the International Year of Sustainable Tourism for Development. The resolution, adopted on 4 December 2015, recognizes "the importance of international tourism, and particularly of the designation of an international year of sustainable tourism for development,

in fostering better understanding among peoples everywhere, in leading to a greater awareness of the rich heritage of various civilizations and in bringing about a better appreciation of the inherent values of different cultures, thereby contributing to the strengthening of peace in the world”.

The declaration by the UN of 2017 as the International Year of Sustainable Tourism for Development is a unique opportunity to advance the contribution of the tourism sector to the three pillars of sustainability – economic, social and environmental, while raising awareness of the true dimensions of a sector which is often undervalued. As the lead UN agency for this initiative, UNWTO will work with on the organization and implementation of the International Year, in collaboration with Governments, relevant organizations of the UN system, other international and regional organizations and all other relevant stakeholders.

(c) The **First Conference on Tourism and Development** to be organized by UNWTO and the People’s Republic of China on the theme of ‘Tourism for Peace and Development’ will be an opportunity to advance the debate at the highest level on how tourism can contribute to the SDGs and the 2030 Agenda for Sustainable Development as well as set the preparation of the celebrations of the International Year of Sustainable Tourism for Development which will be formally presented on the occasion.

(d) UNWTO continues to progress the work of the **10 Year Framework of Programmes on Sustainable Consumption and Production (10YFP)**. Sustainable Tourism is, together with Consumer Information; Sustainable Lifestyles and Education; Sustainable Public Procurement and Sustainable Buildings and Construction; one of the initial five programmes included in the 10YFP. The Sustainable Tourism Programme is led by UNWTO with the Governments of France (Ministry of Ecology, Sustainable Development and Energy), the Republic of Korea (Ministry of Culture, Tourism and Sports) and Morocco (Ministry of Tourism) serving as Co-Leads.

(e) **Promoting of safe and seamless travel:** UNWTO continues to work with the UN System, and namely with the United Nations Office on Drugs and Crime (UNODC), to bring the tourism and security agendas closer together and promote the full integration of tourism into emergency and security mechanisms thus promoting a safer travel framework while advancing the travel facilitation agenda. In this context, a High Level Meeting on Tourism and Security was held in January 2016 in Madrid. The meeting concluded that:

- The current safety and security situation is a global problem and as such requires a global response;
- Countries targeted need collective support to get through the difficulty and to build the recovery;
- Clear communication is critical, including adequate media management;
- Public and private sector must plan, work, communicate, and respond together;
- Accurate and constantly updated travel advisories are critical;
- Experience and best practices must be shared, so that countries can learn from each other; and

- UNWTO is requested to create a task force to progress these discussions at a global level, which could ultimately lead to creating a safety and security charter for the tourism sector.

(f) In order to bring the **tourism and aviation agendas** closer, UNWTO and ICAO have organized a High Level Forum on Tourism and Air Transport for Development on the side-lines of the 21<sup>st</sup> UNWTO General Assembly (more information here [http://cf.cdn.unwto.org/sites/all/files/pdf/unwto\\_icao\\_m\\_statement\\_en.pdf](http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_icao_m_statement_en.pdf))

(g) The UNWTO's 4th International Conference on Tourism and the Media, held in Tunisia in December 2015, recalled the importance of bridging the gap between the **tourism and the media agendas**, namely in times of crises. These series of UNWTO Conferences aim to promote tourism higher in the media agenda, namely among generalist and economic media.

(h) UNWTO has been supporting the efforts of the UNWTO Commission for Africa in positioning tourism higher in the agenda of the African Union. In this regard, UNWTO Executive Director for Technical Cooperation and Services joined UNWTO CAF Chairperson and Minister of Tourism and Hospitality Industry of Zimbabwe, H.E. Dr. Eng. Walter Mzembe, in meeting the Chairperson of the African Union (AU), Dr. Nkosazana Dlamini Zuma, to discuss the role of tourism in the AU's 2063 Agenda. The meeting was attended by the Minister of Culture and Tourism of Ethiopia, H.E. Aisha Mohammed Mussa as well as delegates from Cameroon, Ghana and Zimbabwe.

### **C. Key UNWTO activities in Africa**

---

21. In view of the current and immediate challenges facing tourism development in Africa, namely in terms of image and perception, as well as the long-term objective of advancing the development of the sector in the region as a key pillar of sustainable development, the Secretariat has continued to implement the 2016 Programme of Work in the region.
22. A detailed report on the activities carried out by the Organization since the last report to the 57<sup>th</sup> Commission Meeting held in September 2015 is included in document CAF 58/4. In this framework it is worth highlighting the following activities:
  - A. The 4<sup>th</sup> UNWTO International Conference on Tourism and the Media: Building Partnerships (12 and 13 November 2015, Tunis, Tunisia);
  - B. The VII edition of the Tourism Investment Forum for Africa (INVESTOUR) (21 January 2016, Madrid, Spain); and
  - C. The ongoing implementation of 17 technical cooperation projects in 13 African countries

### **D. Administrative and Financial Matters**

---

23. The year 2015 closed with contribution income balancing budgetary expenditures and enabling a partial reimbursement of the advance made by the Working Capital Fund in 2014. On a separate note, the United Nations Chief Executive Board for Coordination is reviewing a system-wide

approach to the large liabilities raised by the After Service Health Insurance scheme of staff. This has proven to be a protracted issue, this review being a necessary step for its addressing.

24. The detailed reports on the current status of financial and administrative matters of the Organization as of early 2016 will be presented to the 103<sup>rd</sup> Executive Council.
25. In relation to Human Resources policies and following the review by the International Civil Service Commission, the United Nations General Assembly adopted in 2015 a new compensation scheme for staff, including the increase to 65 in the retirement age. This new scheme will be presented at the 103<sup>rd</sup> Executive Council for its adoption by UNWTO.
26. Following the mandate by the General Assembly, a Working Group on reviewing the procedure for Amendment to the Statutes has been working on setting a mechanism to this end, as the current mechanism is leading to the undesirable situation of having to apply 'provisionally' any change to the statutes. The report will be presented to the 103<sup>rd</sup> Executive Council so that the Secretariat is given directions for timely elaboration of a mechanism to be considered by the 22<sup>nd</sup> General Assembly in 2017.
27. The 21<sup>st</sup> General Assembly has ratified the New Headquarters Agreement with Spain, signed in 2015. Subsequently, the Spanish Government has also ratified it. Intensive consultations are now underway with the Spanish Authorities as per its implementation.
28. The Spanish Ministry of Foreign Affairs has designated UNWTO as the dean of the Group of International Organizations in Spain and the Secretary-General as the spoke person of the Group.