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Fifty-third meeting

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PRELIMINARY REMARKS OF THE SECRETARY-GENERAL

Note by the Secretary-General

The Secretary-General submits to the Members of the Commission information on current international tourism trends and UNWTO's programme of work.

INTRODUCTION

1. The present report for the fifty-third meeting of the Commission for Africa briefly addresses the following subjects:
 - Update on International Tourism in 2011 and Prospects for 2012;
 - Mainstreaming Tourism in the Global Agenda;
 - Implementation of the Programmes of Work 2010-2011 and 2012-2013; and
 - Administrative and Financial Matters.

Some of the above-mentioned subjects have constituted the object of dedicated reports for this meeting.

A. Update on International Tourism in 2011 and Prospects for 2012

2. **International tourist arrivals in 2011:** International tourist arrivals grew by 4.6% in 2011 to a total 982 million, up from 939 million in 2010. In a year characterised by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters namely the terrible earthquake and tsunami in Japan, overall results were clearly above expectations. Growth was only slightly higher in advanced economies (+4.9%) than in emerging ones (+4.3%), due largely to the strong results in Europe, and the declines in the Middle East and North Africa.
3. **By region,** Asia and Europe (both at +6%) were the best performing regions in 2011, while by subregion South-East Asia (+10%) topped the ranking. The Americas (+4%) saw an increase of 6 million arrivals, reaching nearly 157 million in total, Africa (+0.9%) maintained international arrivals at 50 million, as the gain of two million by Sub-Saharan destinations (+7%) was offset by the decline in arrivals to North Africa (-9%). The Middle East saw arrivals decrease by 8%.
4. **International tourism receipts** exceeded US\$ 1 trillion for the first time, up from US\$ 928 billion in 2010. In real terms (adjusted for exchange rate fluctuations and inflation), receipts grew by 3.8%, following a 4.6% increase in international tourist arrivals. An additional US\$ 196 billion in receipts from international passenger transport brought total exports generated by international tourism in 2011 to US\$ 1.2 trillion.
5. By region, the Americas (+5.7%) recorded the largest increase in receipts in 2011, followed by Europe (+5.2%), Asia and the Pacific (+4.3%) and Africa (+2.2%). The Middle East was the only region posting negative growth (-14%).
6. **Africa (+1%) held steady at 50 million international arrivals**, with the increase of 2 million in destinations of sub-Saharan Africa (+7%) being offset by the decline in North Africa (-9%).
7. **In terms of international tourism receipts**, results were slightly better than in terms of arrivals. Export earnings from tourism grew by 2% in Africa to reach US\$ 33 billion up from US\$ 30 billion in 2010. Receipts were up by 6% in sub-Saharan Africa while destinations in North Africa saw a decline of 7%.
8. **Prospects for 2012 – international tourist arrivals to reach one billion:** UNWTO forecasts international tourism to continue growing in 2012 although at a slower rate. Arrivals are expected to increase by 3% to 4%, reaching the historic one billion mark by December 2012. Emerging

economies are expected to regain the lead with stronger growth in Asia and the Pacific and Africa (4% to 6%), followed by the Americas and Europe (2% to 4%). The Middle East is forecast to recover part of its losses from 2011. As international tourism receipts tend to be more affected in times of economic constraints, receipts are expected to lag somewhat behind arrivals in 2012.

9. **In Africa**, UNWTO forecast points to a growth in the international tourist arrivals between 4% and 6% in 2012.
10. These prospects have been confirmed by the **first results of 2012**. Preliminary estimates show that international tourist arrivals worldwide grew by 5.5% in the first four months of 2012. Demand was stronger in advanced economy destinations (+6%) than in emerging ones (+5%) despite economic constraints in many of the source markets of Europe and North America.
11. **Growth was positive in all regions**, namely in the Middle East (+0.4%). Asia and the Pacific was the fastest-growing region (+8%) followed by Africa and the Americas with a 6% growth. In Europe (+4%) results were very positive in view of the existing economic constraints.
12. **In Africa**, preliminary results for the first four months reflect the recovery of destinations in North (+6%) while Southern-Africa (+6%) continues to sustain the positive results of previous years.

B. Mainstreaming Tourism in the Global Agenda

13. UNWTO continues to support the **T.20 initiative**, which gathers the tourism ministers of the 20 major world economies. The 4th T20 Ministers' Meeting, held in Mexico (15-16 May 2012), focused on **tourism as an alternative to job creation**. The meeting looked into how **visa facilitation can act as a lever to stimulate demand and create jobs and adopted a declaration encouraging the G20 to "recognize the role of travel and tourism as vehicle for job creation, economic growth and development and commit to travel facilitation as a conduit for job creation, decent work, poverty alleviation and global growth"**. A report commissioned by UNWTO and WTTC for the meeting shows that visa facilitation measures in the G20 economies could create up to 5.1 million additional jobs.
14. **Travel facilitation, taxation and consumer protection** have been identified as **key policy issues** to address in 2012:
 - a) **Travel facilitation**: As destinations worldwide look to stimulate travel demand under pressing economic conditions, UNWTO has been working with several industry bodies and governments to advance visa facilitation, an area in which in spite of the great strides made so far, there is still much room for progress. The Secretariat has been raising awareness among all countries of the potential of maximizing new technologies in improving visa application and processing formalities, as well as the timings of visa issuance, and advising them to analyse the possible impact of travel facilitation in increasing their tourism economies.
 - b) **Taxation**: The recent trend of introducing new and/or increasing existing taxation on travel and tourism continues to represent a serious setback to the sector. The Secretariat has been raising awareness of this issue in several international fora and coordinating with industry bodies to voice the concern of the tourism sector in this respect.
 - c) **Consumer Protection**: please see point 18. e)

15. The Secretariat also continued to work within the **UN system** and with **other international organizations** such as regional development banks **to move tourism higher on the development agenda**, a central issue for tourism development in Africa.

Efforts have been strengthened ahead of **Rio+20**, the UN Conference on Sustainable Development (UNCSD), during which UNWTO organized, together with the Ministry of Tourism of Brazil, two side events:

- A joint event with OECD and UNEP on Green Innovation in Tourism (19 June 2012)
- An official side event on “Tourism for a Sustainable Future” (20 June 2012) in cooperation with the UN Steering Committee on Tourism for Development (SCTD).

More importantly, UNWTO has been lobbying for the recognition of tourism in the official Outcome Document of Rio+20. In this respect, and thank to the active contribution of several Members States (the Republic of Korea, Algeria, the EU, Honduras and the members of the G77), tourism is part of the draft Outcome Document of Rio+20, of the UN Chief Executive Board Statement for Rio+20 and of the Ocean Pact, a major initiative within the Rio+20.

16. UNWTO was also the main contributor to the Chapter on **Tourism of the Green Economy** Report by the United Nations Environment Programme (UNEP) published in 2011.

C. Implementation of the Programmes of Work 2010-2011 and 2012-2013

C.1 Programmes of Work 2010-2011 and 2012-2013

17. An important number of activities has been implemented since the fifty-second meeting of the Commission for Africa and since the report prepared by the Secretariat to the 19th session of the General Assembly covering the period up to June 2011.
18. Detailed information on the activities carried out is provided in documents CAF/53/5.1 and CAF/53/5.2. Some of the activities are as follows:
- a. **Events:** Major global events held include:
 - the Donors' Conference on the Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa, Dakar, Senegal (May 2011);
 - the World Tourism Day High Level Dialogue on Tourism, Linking Cultures in the framework of the celebrations of World Tourism Day 2011 in Aswan, Egypt (September 2011);
 - the 1st UNWTO International Conference on Tourism and the Media in Zagreb, Croatia (September 2011);
 - the 1st International Congress on Ethics and Tourism in Madrid, Spain (September 2011);
 - Special International Symposium on the Revitalization of Japan's Tourism Sector and Quake Affected Regions, Sendai, Japan (October 2011);
 - the 2nd International Conference on the Measurement and Economic Analysis of Regional Tourism, in Bilbao, Spain (October 2011);
 - the UNWTO & WTM Ministers' Summit on *How Tourism Can Prosper in Times of Uncertainty* at the World Travel Market in London, UK (November 2011);
 - Sixth EXCELTUR Tourism Leadership Forum, Madrid, Spain (January 2012);

- a Panel Discussion on Women's Empowerment in the Tourism Sector - an Engine for Development, at FITUR, in Madrid, Spain (January 2012);
- the 3rd edition of INVESTOUR Africa held in FITUR, Madrid, Spain (2012); and
- the 1st Meeting of the Global NTO Think Tank – Creating value through collaboration, a joint initiative of UNWTO and the European Travel Commission (ETC), at ITB Berlin, Germany (March 2012);
- the 7th World Congress on Snow and Mountain Tourism in La Massana, Andorra (April 2012);
- the Conference on The Future of Mediterranean Tourism, Djerba, Tunisia (April 2012)
- the 2nd Tourism and the Media Conference in Marsa Alam, Egypt (April 2012);
- a Joint Tourism Side Event at the 13th session of the United Nations Conference on Trade and Development (UNCTAD XIII), in Doha, Qatar (April 2012);
- The 4th T.20 Ministers Meeting, a Members Driven Initiative, in Merida, Mexico (May 2012);
- UNWTO High-level Regional Conference on Green Tourism in the framework of the 24th Joint Meeting of the UNWTO Commission for South Asia and the UNWTO Commission for East Asia and the Pacific, in Chiang Mai, Thailand (May 2012);
- Seminar on Branding Tourism Destinations in a Connected World in the framework of the 54th Meeting of the UNWTO Commission for Europe, in Batumi, Georgia (May 2012);
- The International Conference on Seizing Market Opportunities in Times of Rapid Change, in the Dead Sea, Jordan (June 2012); and
- the Regional Seminar on Responsible Tourism: Opportunities for Women and Youth taking place in the framework of the 53rd Meeting of the UNWTO Commission for Africa, in Calabar, Nigeria (June 2012).

Several other technical and regional seminars and workshops took place during this period, the detail of which is presented in the corresponding reports.

- b. **Publications:** Among the outputs of UNWTO's extensive research programme during the period under review it is worth highlighting the publication of the following reports:
- The UNWTO long-term forecast ***Tourism Towards 2030 – Global Overview*** presented at the 19th Session of the General Assembly;
 - The ***Tourism Chapter of the Green Economy Report: Investing in Energy and Resource Efficiency***, jointly produced with UNEP;
 - The ***Toolbox for Crisis Communications in Tourism***;
 - A series of reports on outbound travel including *The Chinese Outbound Travel to Africa*, *The Spanish Outbound Travel Market to Africa and the Middle East*, and *The Middle East Outbound Market with Special Insight into the Image of Europe as a Destination* done in cooperation with ETC;
 - The 2012 Editions of the **UNWTO Yearbook** and **Compendium of Tourism Statistics**;
 - The 2012 Edition of the **UNWTO Tourism Highlights**; and
 - The Affiliate Members **Report on LGBT Tourism**.

Moreover, the Secretariat has during 2011-2012 increased the frequency of the ***UNWTO World Tourism Barometer*** to a total of three full issues, two interim updates and one advance release allowing Members a more effective monitoring of short-term tourism trends;

- c. **Technical Cooperation and Development Assistance:** By the end of 2011, a total of 38 ST-EP projects were under implementation in 29 countries; four new projects have started in 2012 (Bolivia, Burundi, Jordan and Timor-Leste). Furthermore, several technical cooperation projects are currently underway, including eight MDG-F Achievement Fund (MDG-F) projects in Ecuador, Egypt, Nicaragua, Panama, Peru, Serbia and Turkey. MDG-F project was concluded during 2011 in Honduras and the one in Senegal will be in September 2012.
- d. **Education and Capacity Building:** Through the UNWTO Themis Foundation, UNWTO's executive arm for education, several training courses were held in the various regions covering areas such as statistics and Tourism Satellite Account (TSA), marketing and promotion, tourism and development, risk and crisis management and sustainable development.
- e. **Special Initiatives and Projects:** Four special initiatives and projects have been further advanced during the period under review:
- **Hotel Energy Solutions:** Following three years of testing and research, the Hotel Energy Solutions online toolkit was officially launched in August 2011. The e-toolkit created to help hotels evaluate their energy consumption and assist in improving their energy management and cutting costs. Though it was developed for European Union Member States in line with EU Energy Policies, it is expected to be rolled out globally. (Discussions on the adaptation and/or translation of the online tool to other languages and regions are on-going). The online toolkit, alongside other web-based resources – 'Energy School', a series of research reports to better understand energy efficiency and renewable energy technologies and promotional materials for hotels to sensitize their guests on energy saving – are available free of charge to all accommodation establishments registered with the project at <http://www.hotelenergysolutions.net>.
 - **Knowledge Network:** The UNWTO Knowledge Network, an important part of the Affiliate Members programme, currently counts 122 knowledge-based tourism-related institutions, organizations and universities from the public and private sectors. UNWTO is strengthening the capacity of the Knowledge Network as an extensive research body of UNWTO to support innovation in policy, governance and other areas of tourism, closely connecting with its Member States and the global tourism community. Some of the planned activities for 2012 include the launch of an interactive virtual home of the UNWTO Knowledge Network and the 2012 edition of the UNWTO Ulysses Prize and Awards (4th quarter of 2012).
 - **Legal instrument on tourist/consumer protection:** In response, and mandated by the 19th session of the General Assembly, the Secretariat has set up a Working Group on the Protection of Tourists/Consumers and Travel Organizations to draft an international convention for the protection of both parties. The convention will be the first legally-binding instrument to be proposed by UNWTO, highlighting the growing relevance and recognition of the tourism sector. In 2011, the Working Group met twice to discuss the content of the legal instrument, as well as to define its scope and level of application. The convention, it was decided, will cover issues including providing assistance to, and ensuring the repatriation of, consumers, particularly in cases of force majeure; the supply of accurate and timely information to tourists including how to handle bankruptcy situations of travel organizers; and issues related to accommodation. In 2012, the Working Group met twice

(in February in Milan, Italy and last week at UNWTO HQ in Madrid, Spain) advancing substantially this process.

- **DEVCO Project:** The European Commission (Directorate General Development and Cooperation – DG DEVCO/EuropeAid) has requested UNWTO to assist in the creation of a Guidebook on Sustainable Development as an engine for development, trade in services, job creation and poverty reduction. The project will deliver a *Sustainable Tourism for Development Study* - an instrument that will enable EU services and other development institutions to include sustainable tourism development projects in their programme cycles.

C.2 Specific UNWTO Activities in Africa

19. In line with the Organization's Programme of Work and strategic objectives, the primary focus of the activities carried out in Africa has been on improving competitiveness and sustainability. This has been done through a series of initiatives, including capacity building, research and technical assistance projects.

a. Capacity-building

- **Regional Training Seminar on Tourism Policy and Strategy for East Africa** (Dar es Salaam, Tanzania, September 2011): Organized by UNWTO and the Ministry of Natural Resources and Tourism of Tanzania, the initiative aimed at providing participants with knowledge, skills, tools and a forum for discussion and reflection on tourism development and planning, destination management, strategic tourism policy, and real solutions to the gaps and problems tourism officials may face. It also promoted the international concepts of sustainable tourism and the principles of the Global Code of Ethics for Tourism.
- **National Statistical Capacity-Building Programme in RETOSA Member States** (October 2010-May 2012): With the purpose of providing technical assistance to the Member States of the Regional Tourism Organization of Southern Africa (RETOSA) in the strengthening their systems of collection and analysis of tourism statistics, UNWTO and RETOSA have embarked upon a project to implement the UNWTO National Statistical Capacity-Building Programme (NSCBP) to all RETOSA Member States.

b. Technical Assistance

- **Botswana:** In 2007, UNWTO completed a tourism statistics project for Botswana which culminated in the formulation of the first preliminary TSA for the country. Given the interest raised by all stakeholders in the TSA exercise and understanding that TSA is a continually evolving tool with data that can be improved in terms of range, scope and accuracy, the Ministry of Environment, Wildlife and Tourism of Botswana decided to engage UNWTO's technical assistance in a new project with particular emphasis on developing staff skills for implementing the TSA and in continuing the compilation and dissemination of a wide range of statistics to all stakeholders.
- **Burundi:** After the signing of the Arusha Agreement for Peace and Reconciliation in August 2000, the Government of Burundi has taken great steps towards the socio-economic development of the country. In this regard, the Government has identified tourism as a priority sector for development given its potential to create sustainable livelihoods for the Burundais people. Since tourism is still in an initial stage of development and aware of the country's diverse quality tourism resources such as Lake Tanganyika, the Government decided, with the support of the United Nations

Development Programme (UNDP), to avail UNWTO's technical assistance in the formulation of a long-term (10-year) Strategic Tourism Development Plan which will guide the sustainable development and promotion of the tourism sector in the country.

- **Burundi:** Based on the successful launch of the National Strategy for the Sustainable Development of Tourism in 2011, the Government decided to advance the implementation of the strategy and requested UNWTO's assistance in the formulation of a detailed Action Plan which would identify priority actions for the first three years, possible sources of funding, lead implementation agencies, and, a coordination, monitoring and evaluation framework for the implementation process.
- **Mali:** The project aims to develop an Ecotourism Plan that will provide guidance to the National Tourism Office (OMATHO) to position Gourma as an ecotourism destination within Mali's main tourism circuit by enhancing and diversifying the existing offer while contributing to the conservation of the last population of elephants in Mali.
- **RETOSA:** A second training workshop on tourism statistics and TSA was held in Masvingo, Zimbabwe, in May 2012 for RETOSA Members. The workshop served as a follow up to the Victoria Falls workshop and delivered training to tourism and statistics officials on the processes towards developing a TSA. 60 participants from 11 countries took part in the training.

c. Events:

- The **Donors' Conference for the Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa** was held in Dakar, Senegal, on 27-28 May 2011. Organized by the Organization of Islamic Conference (OIC) and UNWTO, the event gathered the ten beneficiary countries of the project with donor agencies and international organizations to discuss possibilities for financing priority projects presented on this occasion ('Portfolio of Funding Opportunities'). The Conference expressed its unanimous support for this regional project whose potential is extremely rich and promising in terms of sustainable tourism development, biodiversity conservation, poverty reduction, job creation and infrastructure development.
- The **Third edition of the Tourism Investment Forum for Africa (INVESTOUR)** was held on 19 January 2012 at FITUR in Madrid. This joint initiative between the International Tourism Fair of Madrid (FITUR), Casa Africa, representing the Spanish Government, and UNWTO aims to promote sustainable tourism development in Africa by opening up its destinations to the Spanish outbound and investment markets, while fostering the growth of Africa's entrepreneurial fabric and job creation.
- The **First Pan-African conference on Sustainable Tourism Management in African National Parks and Protected Areas: Challenges and Opportunities** to be organized by the Tanzanian Government and UNWTO in Arusha, Tanzania (15-19 October 2012) is aimed at encouraging a professional approach in order to a) better position 'park tourism' as an essential an integrated component of overall national park management in Africa, b) acquire an overview of the current challenges in terms of demand and supply chain, c) discover how to re-engineer park management structures through new partnership and business models and d) provide insight into the necessary tools to maximize the economic and social benefits to the local communities.
- **20th session of the UNWTO General Assembly:** the General Assembly at its 19th session held in Gyeongju, Republic of Korea, unanimously decided in resolution AG/RES/610 (XIX) to hold its 20th session in Victoria Falls, on the border between

Zambia and Zimbabwe. The dates of 24 -29 August 2013 have been proposed and preparations are underway.

D. Administrative and Financial Matters

20. In 2010, the Secretariat undertook a review of its structure by moving towards a programme-based distribution of posts, more attuned to on-going and emerging needs of the Organization. In 2011, as part of this process and with the expertise of an external consultant, post profiles were reviewed and redefined to better meet the objectives of the various programmes. Subsequently, a professional growth plan was introduced during the second half of 2011. Based on factors such as updated post profiles, positive performance evaluation, objective eligibility criteria, and on-going training of staff, the professional growth plan opens new perspectives to staff members on board by providing them with career growth options and incentives. This is essential when, like in the case of the Organization, the workforce is very limited in numbers but entrusted with a very wide scope of activities and responsibilities. In addition, the professional growth plan is also expected to constitute an incentive to attract highly qualified candidates to fill future vacancies that may be issued as part of the Organization's business continuity scheme. The professional growth plan will be progressively carried out through annual review exercises.
21. The financial implementation for the biennium 2010-2011 has been made in accordance with the approved budget and as anticipated by Member States through the interim Financial Reports and as confirmed by the External Auditors' reports on the accounts for the years 2010 and 2011.
22. The main issue faced in this period has been the challenge of transforming a zero nominal growth into an opportunity to further rationalize expenditure and programme delivery. While the Organization has done well in this regard, a continuation of such policy into the current 2012-2013 biennium may jeopardise outputs or quality. The Secretariat remains actively engaged in avoiding negative impacts from such risk, as described in the following sections.
23. The Secretariat has noted with appreciation efforts made by the large majority of Member States to keep current on their financial obligations and, in some cases, to advance the payment of accumulated arrears, particularly in the current economic context. Without the continuous financial means provided by its Members, it would not be possible for the Organization to operate adequately.
24. Regarding the preliminary financial implementation for 2012, the Secretariat has elaborated a plan of expenditure based on prudent financial estimates and will continue monitoring its implementation as the year progresses. Member States will be kept abreast of any development in this regard.
25. The Secretariat continues highly committed to strengthening its efforts in raising extra-budgetary funds for technical cooperation activities as well as for other programmes. The establishment of a dedicated fund-raising programme within the Secretariat has been a milestone in this endeavour. This new programme is focused on tapping into extra source of funding which allow expanding the Organization's outreach and the service to Members without increasing the regular budget and the Members' contributions. Within the work of the Organization in this regard, and as reported to the 19th session of the General Assembly, UNWTO is now recognized as an ODA Eligible Organization for Bilateral Aid, which means that funds channelled through UNWTO for projects in ODA eligible countries can now be considered as an official development assistance amount. For the next programming period UNWTO would need to increase its extra-budgetary resources so as to meet the DAC's present minimum threshold of US\$ 20 million of overall resources annually directed at ODA recipient countries in order to become a fully-fledged ODA eligible international organization.