

## UNWTO East Africa Tourism Development Forum

Mombasa, Kenya

20-22 August 2015

### 1. OVERVIEW AND PURPOSE OF THIS DOCUMENT

Over the period of 20-22 August 2015, the UNWTO EAST AFRICA TOURISM DEVELOPMENT FORUM, organized by the World Tourism Organization (UNWTO) and the Ministry of East African Affairs, Commerce and Tourism, Kenya took place in Mombasa, Kenya, from at the kind invitation of the Government of Kenya.

This document provides a Summary of the **Purpose and Conclusions** emerging from the forum.

### 2. BACKGROUND

Travel & Tourism has proven to be a truly global phenomenon defining the 21st Century. An activity once reserved for the privileged few only some decades ago, with more than one billion people crossing international borders each year, Travel & Tourism today offers people across the world an unparalleled source of growth, development, opportunity and unity. Globalization of goods and services, more leisure time, the technological and transport revolutions and rising middle classes, firmly positions tourism as one of the world's leading growth engines.

The numbers speak for themselves: 25 million international arrivals in 1950, 674 million in 2000, and over 1.1 billion in 2014 – international tourism shows no signs of slowing down. In 2014, international tourism exceeded once again our expectations, rising by 4.7% and hitting a new record of 1,138 million tourists travelling the world in one single year.

This remarkable tourism sector growth has had an invaluable impact on economies worldwide. Providing nations with the basis for development, investment, earnings, job creation and vital social inclusion, at present tourism accounts for 9% of global GDP, generates more than US\$ 1.3 trillion in trade income or 30% of the world's services exports, and provides one in eleven jobs worldwide.

In 2015, UNWTO forecasts international tourist arrivals to grow between 3% and 4%. Maintaining an inspiring growth trajectory, UNWTO analysis estimates that by 2030, the number of international arrivals will reach 1.8 billion meaning that in two decades' time, 5 million people will cross international borders for leisure, business or other purposes such as visiting friends and family every day, not even including the four times as many tourists traveling domestically.

Nowhere is the value of Travel & Tourism more clearly evidenced than in Africa.

In 2014, the African region maintained a 5% share in worldwide arrivals and a 3% share in tourism receipts. In absolute terms, the region welcomed a total of 56 million international tourists representing an increase of 2% versus prior year. International tourism receipts (+3%) increased by US\$ 1 billion to reach US\$ 36 billion. These figures should, however, be interpreted with caution, as results are still based on the comparatively limited data available so far.

Examining the continent's performance on a sub-regional basis:

- In North Africa (+1%), international tourist arrivals in leading destination Morocco grew by a modest 2%, following a strong performance in 2013, while arrivals in Tunisia decreased by 3%.
- Sub-Saharan Africa grew by an estimated 3% in 2014, based on available information. Arrivals to the subregion's largest destination South Africa (+0%) were flat in 2014.
- Worth mentioning among the other destinations for which data is reported are Côte d'Ivoire (+24%), Madagascar (+13%), Mauritius (+5%), Zimbabwe (+3%) and the Seychelles (+1%).

The next 20 years show clear signs of continued growth in Travel & Tourism for the African continent.

Importantly, they also offer the opportunity to be years of leadership: tourism as the continent's leading sector for economic growth, social progress and environmental sustainability.

Continent-wide, to make this possible we need to make tourism a priority in national policy decisions, foster competitive and responsible business models and practices and increase cooperation between the public and private sectors.

In addition, it is critical that **sub-regional destinations look to cooperation to advance tourism growth** and development efforts, working together to be able to leverage traveller interest and mobility in their quest for unique, enriching African travel experiences. In so doing, the opportunity exists for sub-regions, and the continent as a whole, to maximise sustainable growth and competitiveness for the betterment of all nations.

In this spirit, Tourism leaders of the sub-region came together as a prelude to advancing growth opportunity for destinations of the sub-region individually, and collectively.

### 3. FORUM DAY 1 - OPPORTUNITY FOR EAST AFRICA TOURISM DEVELOPMENT

In an effort to accelerate the unlocking of greater potential of the East Africa sub-region, the forum brought together Tourism leaders of the East Africa and the Vanilla Islands to participate in the first EAST AFRICA TOURISM DEVELOPMENT FORUM

**Aims of the East Africa Tourism Development Forum were to:**

1. Unite the region's Tourism leaders to engage in interactive dialogue around the important theme of "CONNECTING OPPORTUNITY".
2. Engage a series of thoughtful, solutions-orientated discussions focused on advancing tourism growth in the East Africa region

3. Examine the East African regional *IMAGE*, the region's awareness, understanding, appeal and invitation as a lever for sustainable, equitable tourism activity into and around the region.
4. Look more closely at *INTEGRATION* – identifying approaches to cooperative development of the tourism offering as a prelude to enhanced positioning of East Africa and the Vanilla Islands within the highly competitive global tourism landscape, thereby directing tourism opportunity towards destinations within the greater region.
5. Address matters surrounding *FACILITATION*. Together, opportunities for collaboration around mobility for greater shared benefit.

The two-day forum (programme attached) explored the following key questions:

- What are the areas of cooperation that should be relooked to strengthen our collective tourism offering?
- What needs to occur for effective regional policy implementation?
- How best should we approach the role of governance and resource efficiency management in boosting the tourism sector in the East Africa Community?
- What are the policies and initiatives/innovative approach to be undertaken to promote domestic tourism?
- What is being done to overcome the challenge of transport infrastructure development of the region?
- What is being done about the advancement in travel facilitation (visa regulations, for example) and the impact on the tourism industry in the region?
- What are the potential constraints of African air transport that hinder its optimal performance? And in which ways they are affecting the tourism sector?

Members of the sub-regional tourism community came together in Mombasa for the first EAST AFRICA TOURISM DEVELOPMENT FORUM. The forum was officially opened by His Excellency, William Samoei Arap Ruto, Deputy President of Kenya.

Over the course of the day 1 of the forum, rich and rigorous discussion took place around the aforementioned areas of sub-regional cooperation. Through a series of insightful sub-regional presentations and panel discussions, the scope of the opportunity for sub-regional growth was examined, pushing theories around areas of growth facilitation to concrete actions required, and importantly, putting responsibility for growth firmly in the hands of the sub-regional tourism community.

At the conclusion of the day, collective commitment was to advancing sub-regional tourism development, directly addressing areas of:

- image advancement,
- shared innovation for enhanced competitiveness, and

- regional travel mobility promotion.

#### 4. FORUM DAY 2 - CLOSED DOOR MINISTERIAL DISCUSSION

The second day of the forum included a closed door Ministerial Discussion, specifically scheduled to review the outcomes of the themes addressed in the forum, with emphasis on:

- Agreed regional priorities for collective growth
- Actions for regional leadership going forward
- Mechanism(s) for momentum of progress and on-going cooperation

The Ministerial Dialogue proved an invaluable opportunity for direct discussion around how, both through cooperative principles and practices, sustainable sub-regional tourism growth could be achieved.

The following emerged as key take-outs from the Ministerial Discussion:

The **IMAGE** of the sub-region is vital to tourism development. Proactively sustaining a positive image for the sub-region must be adopted as an on-going process. This requires not only owning the narrative of the sub-region, being clear and consistent to ensure basic information around locations and natural/cultural offerings are understood, but working with leading opinion leaders, and leveraging all forms of media (traditional and new-media (ie social media)), to ensure messaging is accurate, aligned and inspiring of traveller activity.

Image was agreed to be inter-related with **SECURITY**. Therefore, the sub-region needs to be speaking with one voice the clear message that security challenges in East Africa are global challenges, demanding a global response. Sub-regional leaders need to possess and share factual information around security so that facts can be swiftly disseminated to ensure accuracy of messaging within the tourism community and amongst the media. When a crisis occurs within the sub-region, support of the sub-regional community is vital to recovery. In addition, sub-regional leaders need to dialogue more through African Union and heads of state to embed and adopt a coordinated approach. Activation of an *East Africa Tourism Security Forum*, establishment of an *East African Tourism Portal*, adoption of the UNWTO Crisis Toolbox for Crisis Communications in Tourism and creation of an East Africa Events Calendar for cross-regional promotion, were key proposals emerging from dialogue around the areas of Image and Security.

Furthermore, strong agreement emerged that **INNOVATION** in sub-regional product and promotion, and equitable business model development, is required to fuel opportunities for growth coming from traditional and emerging source markets, as well as the impact of new technologies to enhance traveller awareness building and experience delivery. Shared sub-regional resources would be required for research around innovation, and product development and promotion thereafter. When it comes to the growing all-inclusive approach to tourism product development, innovative practices are needed to enable all-inclusive businesses (hotels, cruise liners) to engage local SMEs in-country to allow for greater traveller interaction with the destination (which they seek) and greater commercial activity in-country. Across the innovation spectrum, the UNWTO

Knowledge Network was deemed an ideal platform for accessing sharing information, training and students for the benefit of the East Africa region, and staging competitions / granting of awards around young talent as a means of creating a momentum around talent utilisation and celebration.

The need for enhanced sub-regional travel **FACILITATION** was agreed as a shared priority for tourism leaders if growth and development of the sector is to be truly unlocked. Broad agreement emerged that facilitation was not only about visa regulations and taxation, but the optimization of the entire travel process. Once again, technology was identified as an invaluable enabler for addressing opportunities for unlocking facilitation barriers and leveraging enablers. It was proposed that UNWTO should consider to embark on a study of the visa situation in East Africa, In addition, leaders of the sub-region were encouraged to support ICAO's proposed African Aviation Forum targeted for 2016, and to be held in East Africa.

As final conclusions of the Ministerial Dialogue and a way forward for step-change sub-regional advancement, it was agreed that:

1. To enable sub-regional tourism development, the need exists to engage with African Union, calling for Commissioner of Tourism in AU. The upcoming October 2015 meeting with the AU Chairperson was deemed the ideal platform for presenting the case to the AU as to why tourism matters in Africa, and how the sector can be leveraged by the AU to advance its socio-economic goals.
2. The development of an East Africa Tourism Board is to be explored, creating a platform for collective advancement, with African leaders taking a lead, united role in African tourism development.
3. To elevate the message of the importance of Tourism in African development, a tourism side event is to be staged at the WTO MC10 World Congress in December 2015 in Kenya.

The East Africa Tourism Development Forum concluded with tourism leaders re-emphasizing the importance and value of sub-regional, and African, tourism leaders working together for shared ownership and championing of tourism development. The UNWTO is proud to work alongside leaders of the sub-region to enable fulfillment of collective tourism development potential for the benefit of all destinations across the region.