# Trends and Challenges in Tourism: Globally and in SADC

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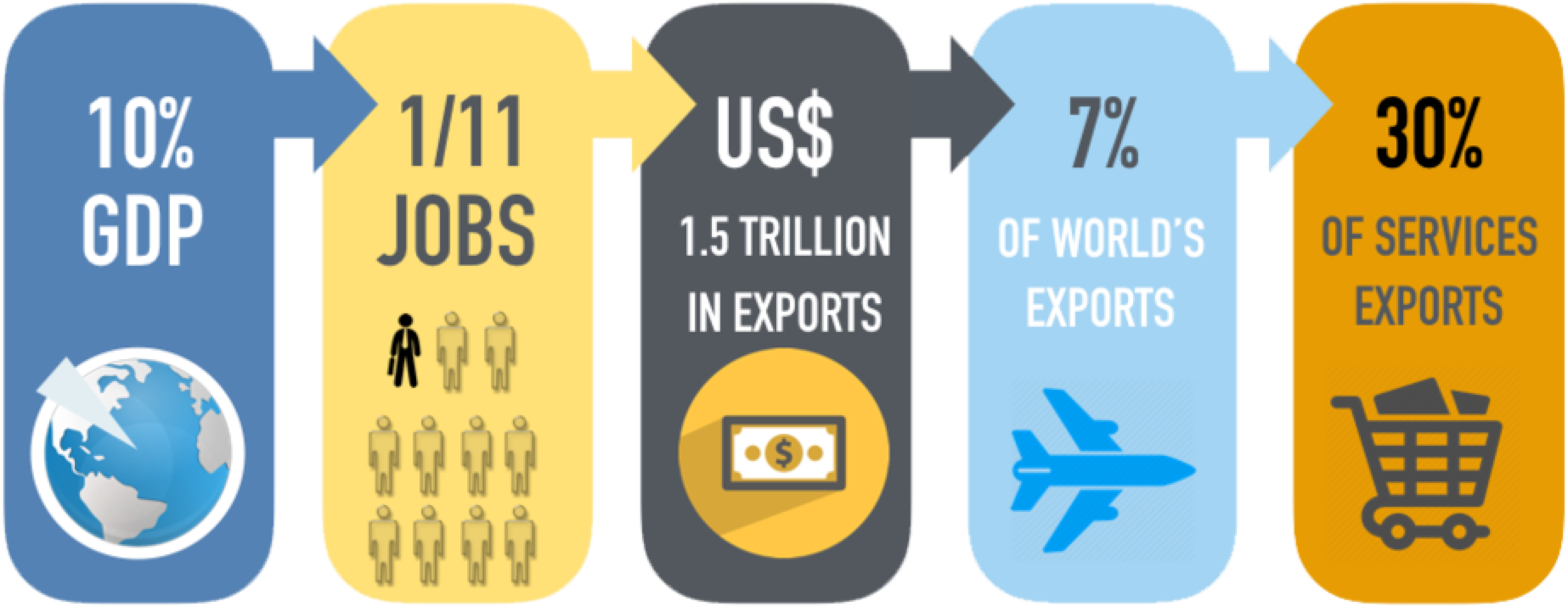
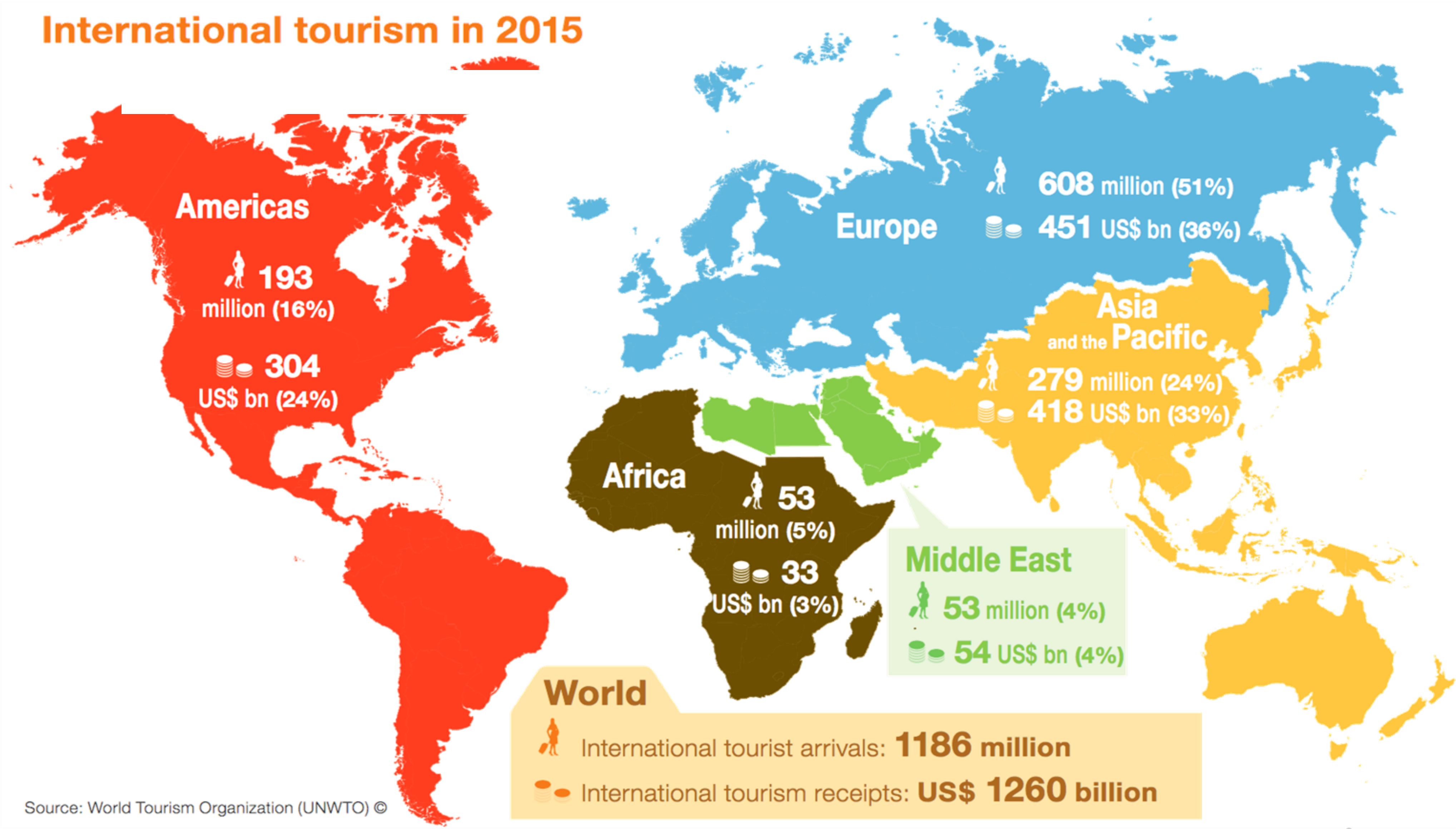
# Global Tourism: Key Figures



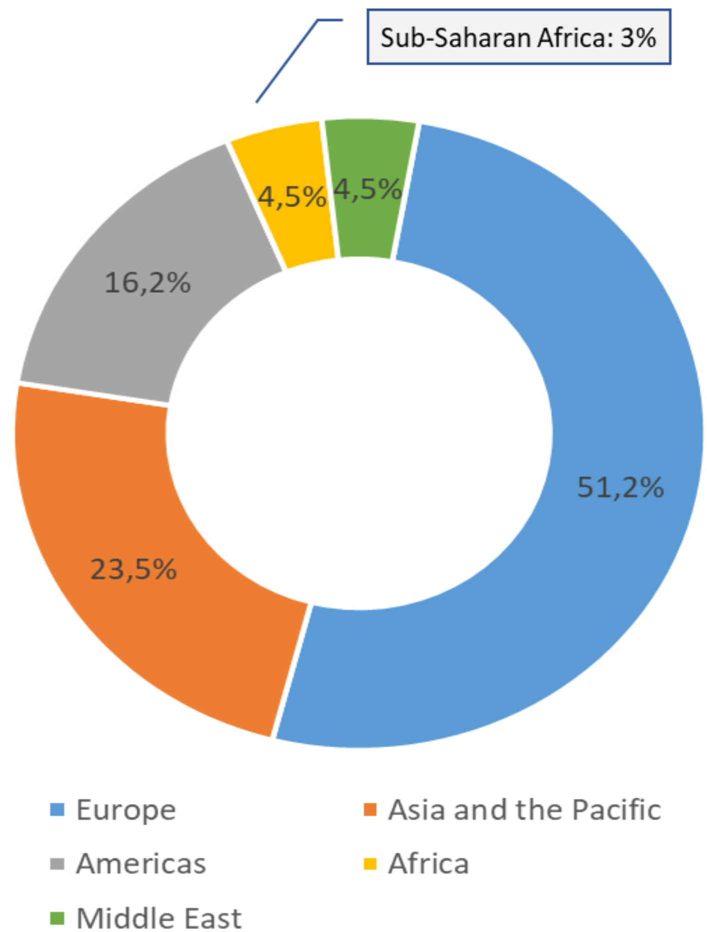
# International Tourism



1.235bn International tourist arrivals were recorded in 2016. A 3.9% increase from 2015 (1.189bn).

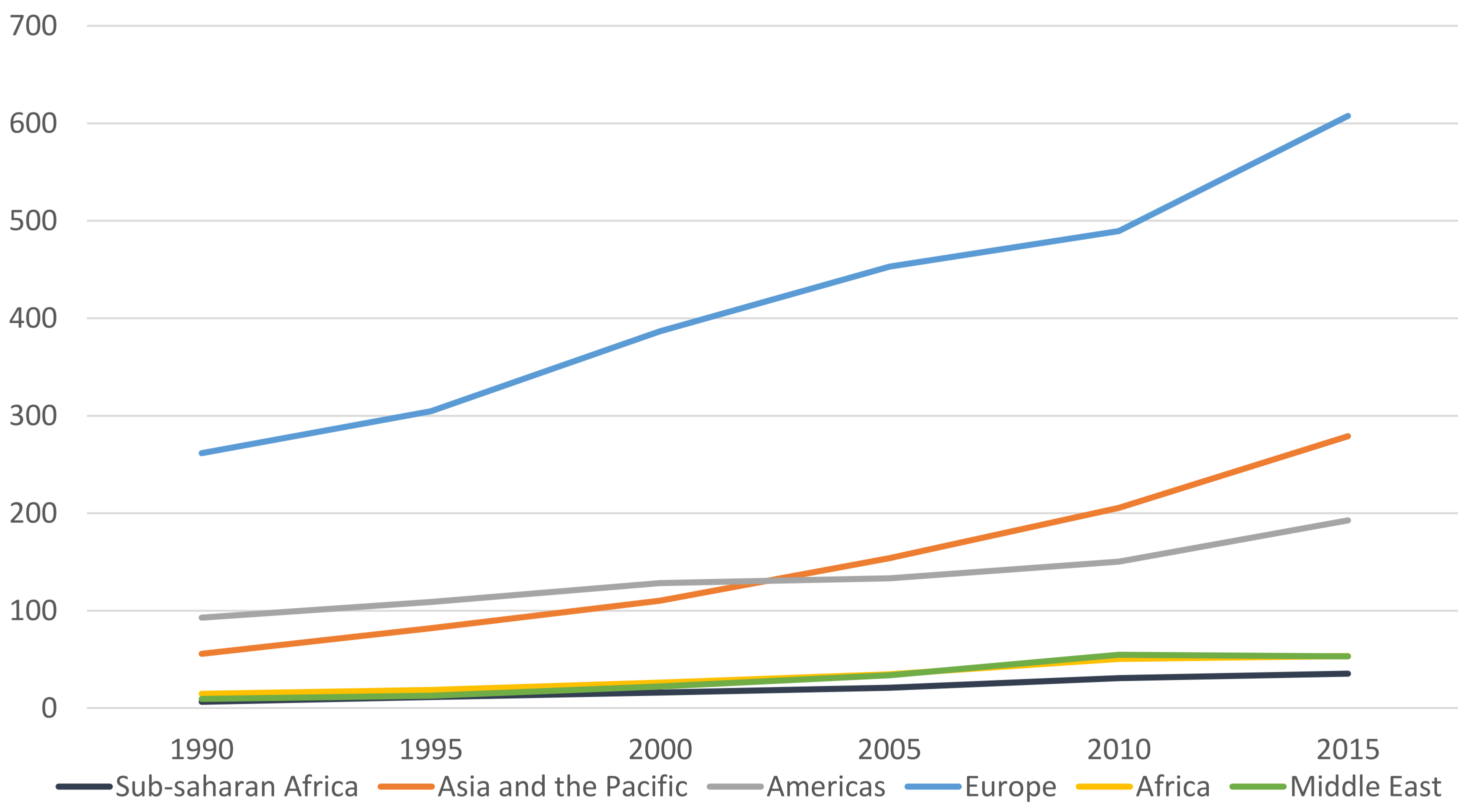
Africa recorded 57.8mn arrivals from 53.4mn during the same period. An 8% increase.

**Market Share, per region, 2015**



# International Tourist Arrivals

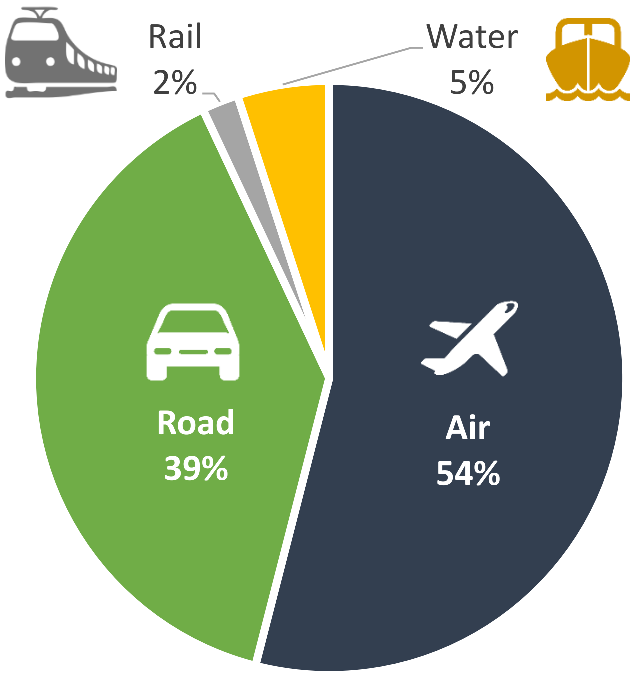
**Evolution of International tourist arrivals, per region, 1990-2015 (million)**



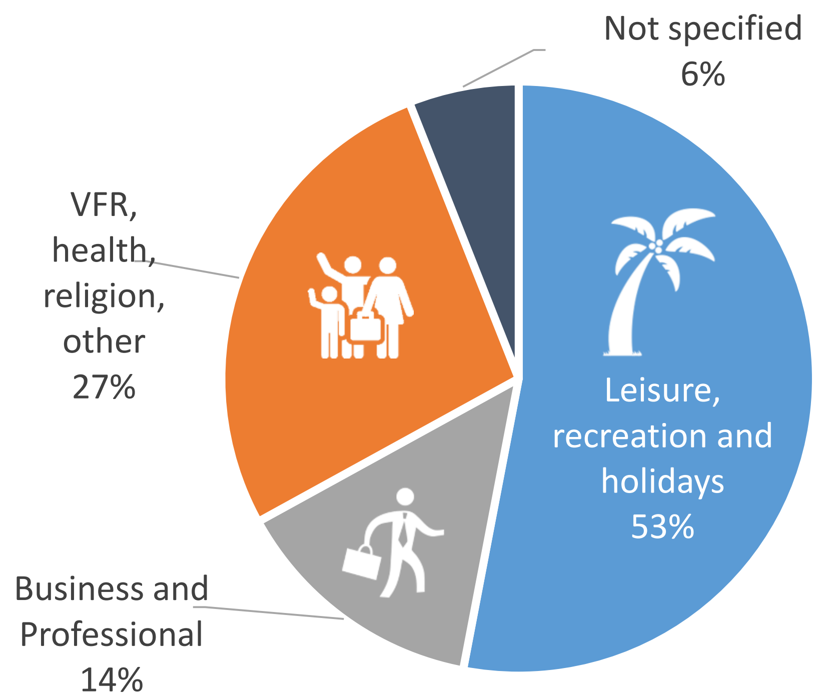

Source: UNWTO

# International Inbound Tourism

## By Mode of Transport, 2015




## By Purpose of Visit, 2015



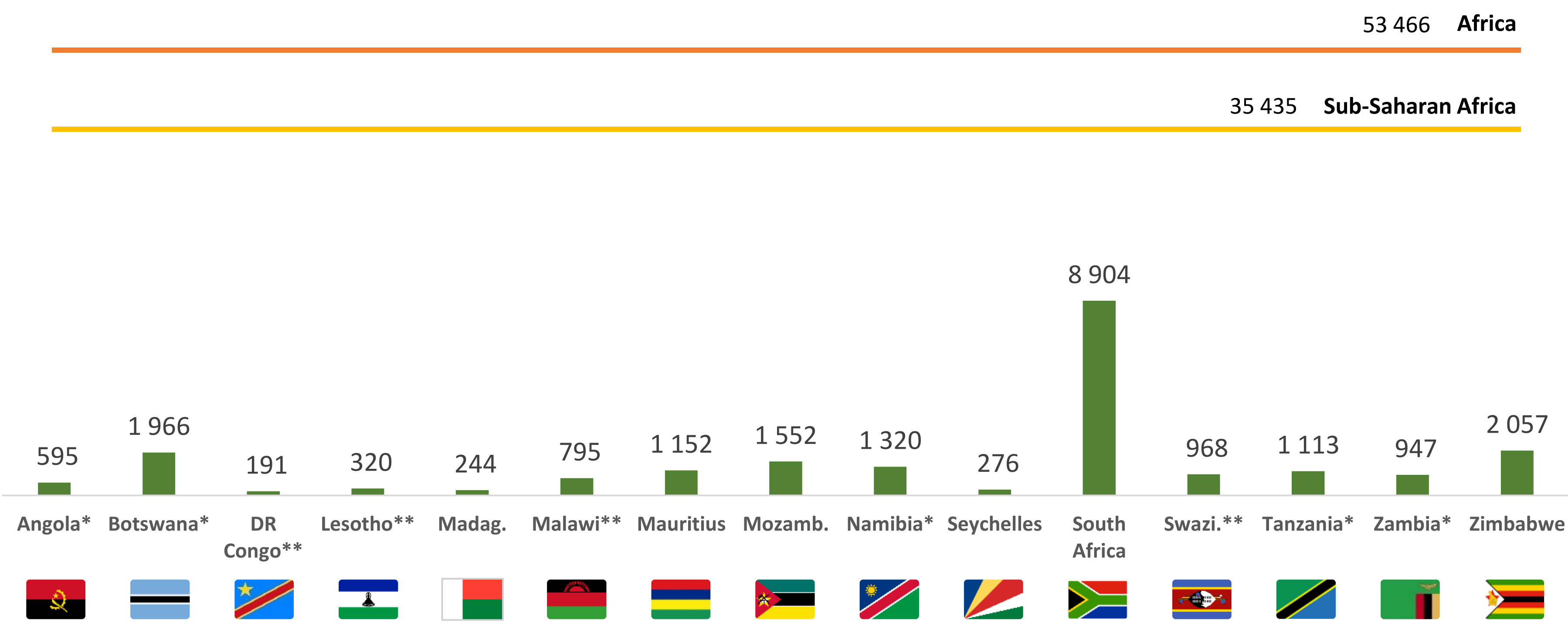

Source: UNWTO

VRF - Visiting Friends and Relatives

# International Tourist Arrivals

## *RETOSA members*

**International tourist arrivals, per country, 2015 (million)**




Source: UNWTO; * last data available 2014; ** last data available 2013

# Tourist Arrivals (000) RETOSA Member states

| COUNTRY | 1990 | 2000 | 2010 | 2015 | 2016 |
|---|---|---|---|---|---|
| **Angola** | 67 | 51 | 430 | 592 | - |
| **Botswana** | 543 | 1 104 | 2.145 | 1528 | - |
| **D R C** | 56 | 103 | 81 | - | - |
| **Lesotho** | 242 | 302 | 414 | - | - |
| **Madagascar** | | | 196 | 244 | 293 |
| **Malawi** | 130 | 228 | 746 | 805 | - |
| **Mozambique** | | 55 | 1 718 | 1552 | 1639 |
| **Namibia** | 272 | 861 | 984 | 1388 | - |
| **Seychelles** | 104 | 130 | 175 | 276 | 303 |
| **South Africa** | | 5 872 | 8 074 | 8904 | 10.044 |
| **Swaziland** | 263 | 281 | 868 | 873 | 947 |
| **Tanzania** | | 459 | 783 | 1104 | - |
| **Zambia** | 141 | 457 | 815 | 932 | 956 |
| **Zimbabwe*** | 552 | 1 967 | 2 239 | 2057 | 2.168 |
| **SADC (million)** | **2. 6** | **12. 6** | **20.378** | **21162** | |
| **Africa (million)** | 14.8 | 26.5 | 49 | 53.4 | 57.8 |
| **World (million)** | **438** | **674** | **953** | **1.189mn** | **1.235mn** |
| | | | | | |

Source UNWTO June 2017 report

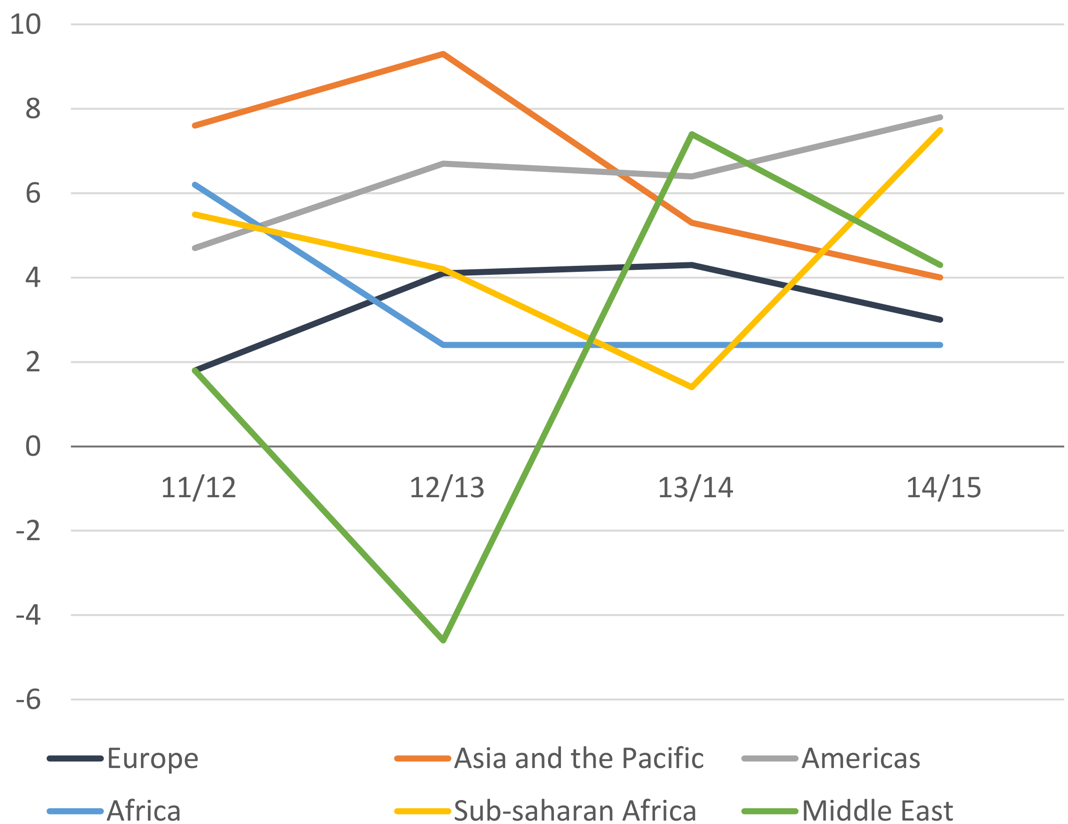
# RETOSA Member States % Market Share of Tourist Arrivals into Southern Africa

| COUNTRY | 1990 | 2000 | 2010 | 2015 |
|---|---|---|---|---|
| Angola | 1.3 | - | 2.1 | 2.8 |
| Botswana | 9.4 | 8.1 | 7.9 | 7.2 |
| D R C | 0.4 | - | 2.7 | - |
| Lesotho | 1.9 | 1.9 | 2.1 | - |
| Malawi | 2.8 | - | 3.8 | 3.8 |
| Mauritius | 4.8 | - | 4.6 | 11.5 |
| Mozambique | 3.7 | | 9.0 | 7.3 |
| Namibia | 4.9 | | 4.9 | 6.6 |
| Seychelles | 0.8 | | 0.9 | 1.3 |
| South Africa | 46. 8 | 44.3 | 41.0 | 42 |
| Swaziland | 5.3 | - | 6.5 | 4.1 |
| Tanzania | 3.7 | - | 3.8 | 5.2 |
| Zambia | 4.2 | - | 4.0 | 4.4 |
| Zimbabwe | 9.9 | - | 10.9 | 9.7 |

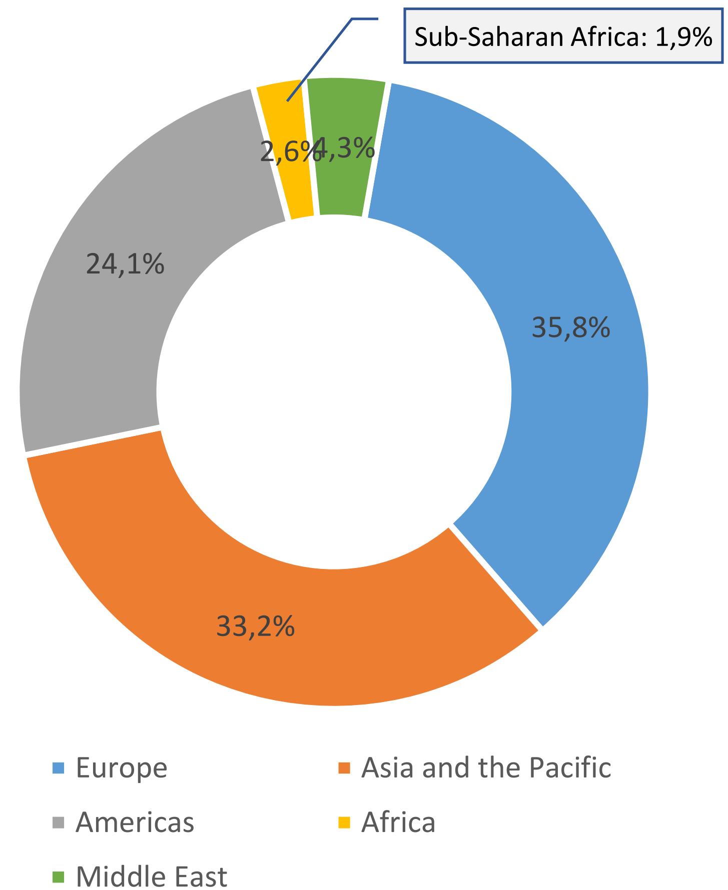
Source  RETOSA 2011

# International Tourism Receipts

**Evolution of International tourism receipts, per region, 1990-2015 (billion USD)**




**Market Share, per region, 2015**




Source: UNWTO

# Tourism receipts(million) by RETOSA Member states

| COUNTRY | 1990 | 2000 | 2010 | 2015 | 2016 |
|---|---|---|---|---|---|
| Angola | 98 | 143 | 719* | 1163 | - |
| Botswana | 117 | 222 | 218* | 948 | 1101 |
| D R C | 7 | - | 11 | 0.1 | - |
| Lesotho | 17 | 24 | 34 | 34 | 34 |
| Madagascar | | | 307 | | - |
| Malawi | 16 | 25 | 31 | 37 | - |
| Mozambique | | 74 | 108 | 193 | 108 |
| Namibia | 85 | 160 | 438 | 375 | 295 |
| Seychelles | | 139 | 343 | 392 | 414 |
| South Africa | 1 832 | 2 675 | 9 070 | 8235 | 7910 |
| Swaziland | 30 | 37 | 51 | 14 | - |
| Tanzania | 65 | 377 | 1 255 | 2006 | 2135 |
| Zambia | 41 | 67 | 492 | 660 | - |
| Zimbabwe | 60 | 125 | 634 | 886 | - |
| **SADC** | **2 597*** | **4 610*** | **14 405** | **14 943.1** | **11 997** |
| **Africa** | | **10 333** | **31 193** | **32 784** | **34 760** |

Source UNWTO June 2017 report

# Length of stay, accommodation, capacity and usage , tourism employment: 2015

| Country | Length of Stay | No of Rooms Available | Room Occupancy Rate(%) | Number of beds available | Bed Occupancy Rate | Number of Employed Directly |
|---|---|---|---|---|---|---|
| Angola | 7 | 9 593 | - | 40 072 | 76 | - |
| Botswana | 5.3 | 6 511 | 48.1 | 12 686 | 44.2 | 17 100 |
| DRC | 4.5 | - | - | - | - | - |
| Lesotho | 4 | 2 727 | - | 5 001 | 19.4 | 1 500 |
| Malawi | 9.5 | 6 500 | 62. 3 | - | 55.1 | - |
| Mauritius | 11.5 | 12 263 | 65 | 25 789 | 54 | 29 520 |
| Mozambique | 5.4 | 21 061 | 31.5 | 38 461 | 31.5 | 40 000 |
| Namibia | 17 | 7 116 | 29 | 46 093 | 29 | 81 00 |
| Seychelles | 11 | 10 512 | 61 | 2 204 | 61 | 15 250 |
| South Africa | 8.4 | 63 000 | 60 | - | - | 919 800 |
| Swaziland | 1.5 | 20 596 | 51.4 | 2 889 | 37.7 | - |
| Tanzania | 12 | 38 950 | 55.5 | 56 006 | - | 260 000 |
| Zambia | 6 | - | - | 19 345 | 47 | - |
| Zimbabwe | 3 | 12 263 | 52 | 21 158 | 59 | 105 000 |

Source Member States

# VISA Openness in SADC/AFRICA: Country Rank

| COUNTRY | VISA REQUIRED | VISA ON ARRIVAL | NO VISA REQUIRED | RANK IN SADC | RANK IN AFRICA |
|---|---|---|---|---|---|
| Angola | 52 | 1 | 1 | 15 | 52 |
| Botswana | 36 | 0 | 18 | 9 | 27 |
| D R C | 47 | 3 | 4 | 14 | 43 |
| Lesotho | 38 | 0 | 16 | 11 | 32 |
| Madagascar | 0 | 54 | 0 | 4 | 11 |
| Malawi | 27 | 13 | 14 | 6 | 19 |
| Mauritius | 6 | 22 | 26 | 3 | 9 |
| Mozambique | 0 | 46 | 8 | 2 | 7 |
| Namibia | 41 | 0 | 13 | 13 | 36 |
| Seychelles | 0 | 00 | 54 | 1 | 1 |
| South Africa | 40 | 0 | 14 | 12 | 34 |
| Swaziland | 37 | 0 | 17 | 10 | 31 |
| Tanzania | 11 | 37 | 6 | 5 | 17 |
| Zambia | 28 | 13 | 13 | 7 | 21 |
| Zimbabwe | t29 | 8 | 17 | 7 | 21 |

# AFRICA's VISA OPENNESS INDEX

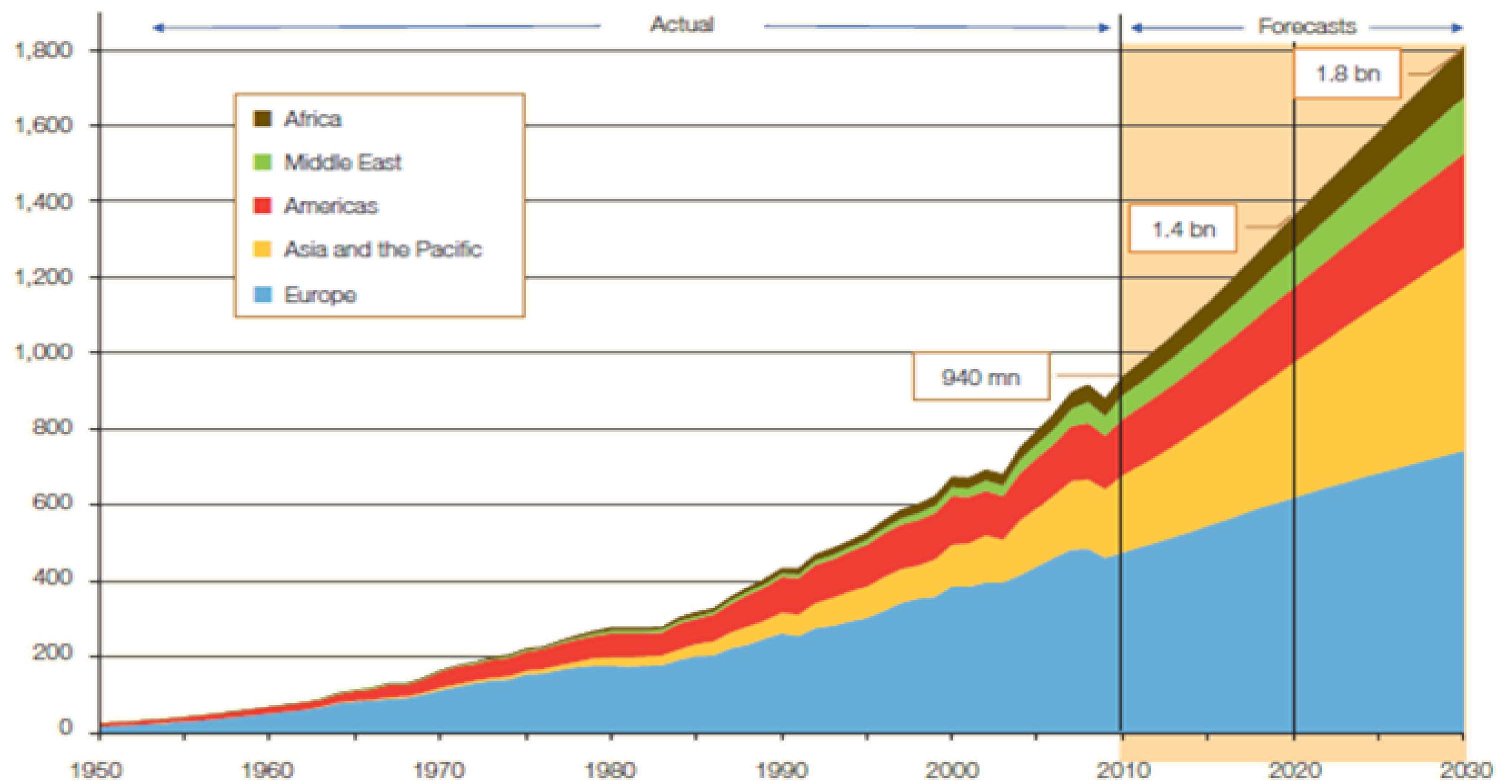
| COUNTRY | RECs RECIPROCAL OPEN VISA POLICY |
|---|---|
| ECOWAS | 100% |
| EAC | 100% |
| UMA (Arab Maghreb Union) | 60% |
| SADC | 52% |
| COMESA | 21% |
| ECCAS | 11% |
| ALL AFRICA | 17% |

**SOURCE: ADB 2017 REPORT**

# Tourism Towards 2030

The number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. Asia and the Pacific will gain most of the new arrivals

**International tourist arrivals, per region, actual trend and forecast 2950-2030 (million)**




Source: UNWTO

# Population sizes by region

| Region | 2010 (000s) | 2025 (000s) | % Increase |
|---|---|---|---|
| Africa | 1 033 043 | 1 417 057 | 37.2 |
| Europe | 732 759 | 743 890 | 15.2 |
| Latin Americans | 588 649 | 678 788 | 15.3 |
| North America | 351 659 | 388 472 | 10.5 |
| Asia | 4 166 410 | 4 730 130 | 13.5 |

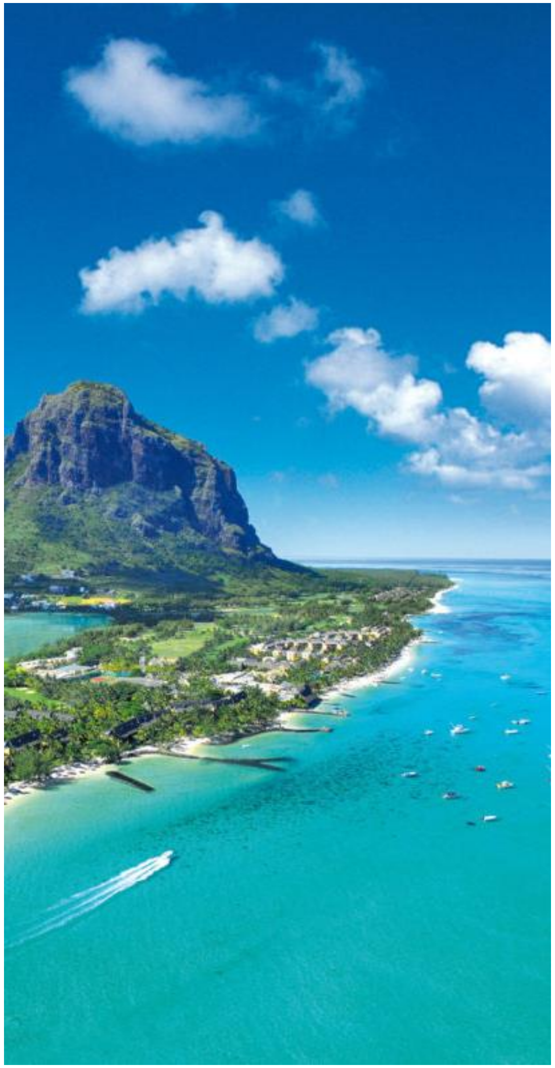
The WB estimates that by 2025 more than half of the World's middle class will be from Asia with China and Indian accounting for two thirds of changing demographics and increasing global population. During the period Africa will experience the highest increase 0f 37.5%.

Ceteris paribus: The larger the population the larger the travelling market. This has to be read together with income levels (disposable incomes)

Source UN population division 2011

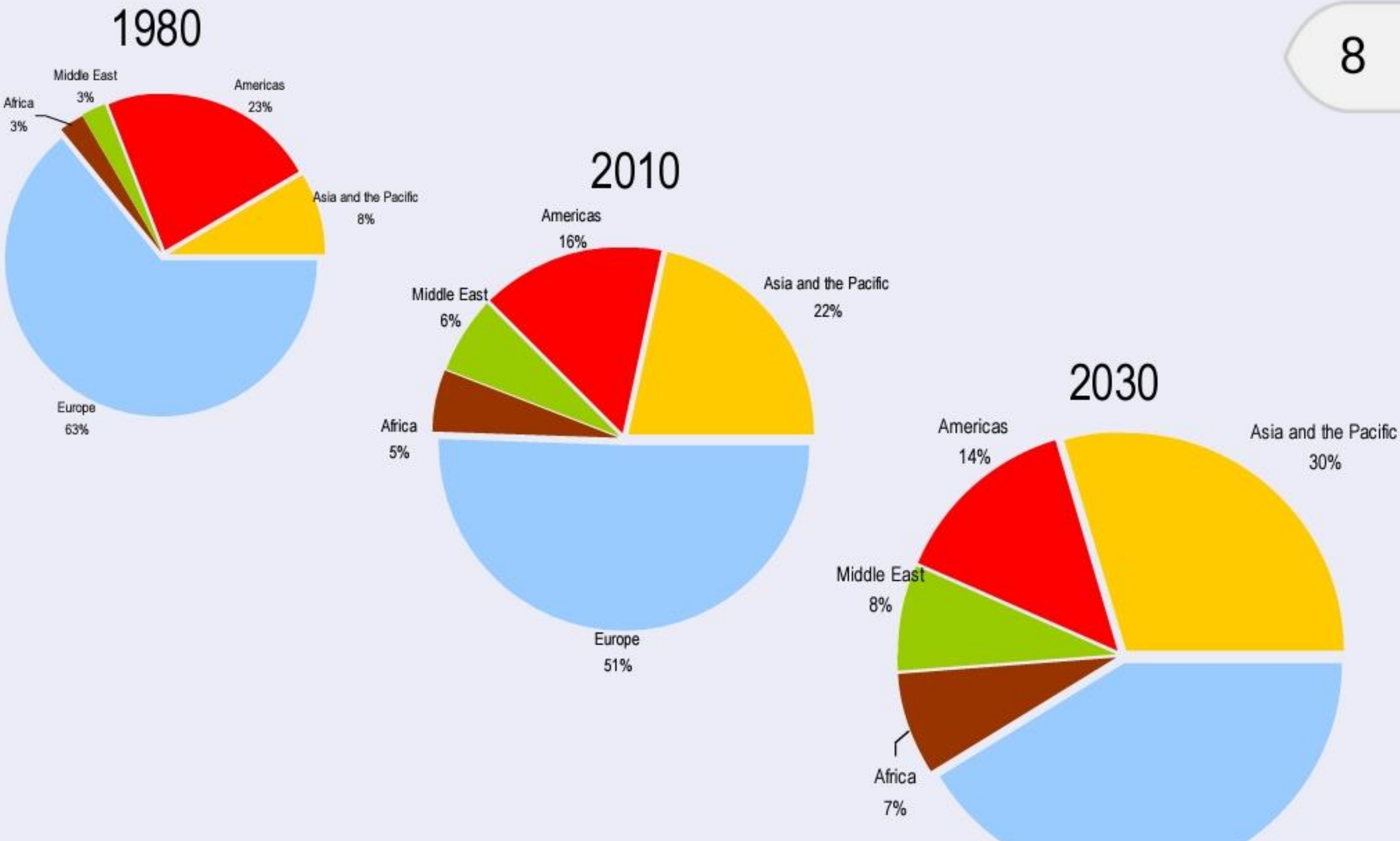
# Tourism Towards 2030

- Global growth in international tourist arrivals to continue, but at a more moderate pace, from 4.2% per year (1980–2020) to 3.3% (2010–2030), as a result of four factors:
    - The base volumes are higher, so smaller increases still add substantial numbers
    - Lower GDP growth, as economies mature
    - A shift from falling transport costs to increasing ones
- New destinations can enjoy higher growth levels provided they do shape the adequate conditions and policies with regard to business environment, infrastructure, facilitation, marketing and human resources.
- Challenges will arise in maximising social and economic benefits and minimising negative impacts
- Long-term tourism growth pattern: more moderate, sustainable and inclusive



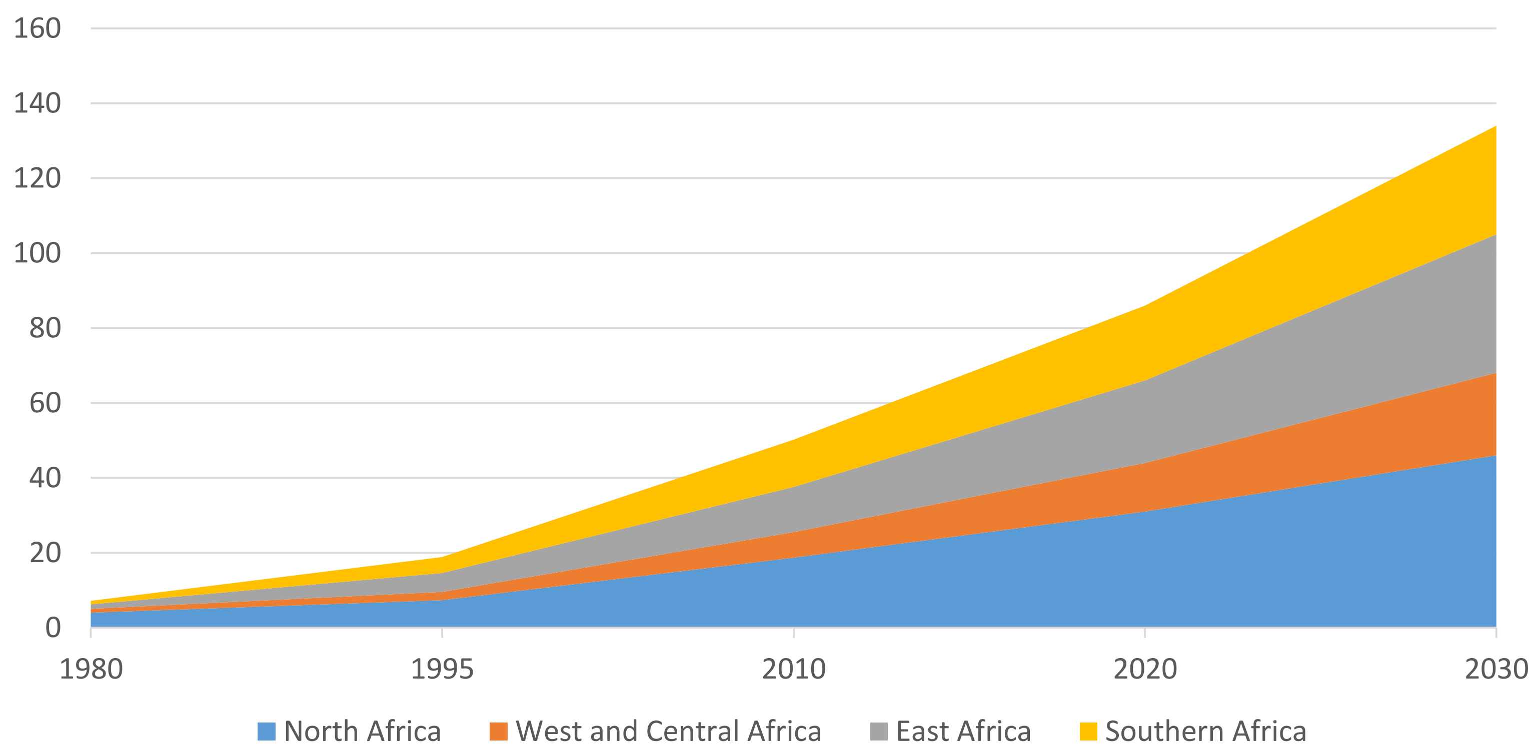
# Asia and the Pacific, the Middle East and Africa to increase their shares





# Tourism Towards 2030

**International tourist arrivals in Africa, actual trend and forecast 1980 – 2010 - 2030 (million)**



# Future Trends in Tourism

**DEMAND SIDE**

- SILVER HAIR TOURISTS
- GENERATION Y & Z
- GROWING MIDDLE CLASS
- EMERGING DESTINATIONS
- POLITICAL ISSUES AND TERRORISM

**SUPPLY SIDE**

- TECHNOLOGICAL (R) EVOLUITON
- DIGITAL CHANNELS
- LOYALTY v.X.0.
- HEALTHY LIFESTYLE
- SUSTAINABILITY

# SOUTHERN AFRICA UP TO 2030

Southern Africa's global tourism market share has not changed much over the last 2 decades, with both tourism arrivals and tourist receipts at around 2%.

With out a serious paradigm shift our global market share may not increase much in the period up to 2030.

Some of the challenges to be addressed will include the following:

# Challenges for Southern Africa

1. **Underdeveloped Tourism Infrastructure**
    - Natural and cultural resources protection
    - Air transport system
    - Quality of roads and ports
    - Electricity access
    - Digital/Internet communication

2. **Poor Intra-African Air Connectivity**
    - Few flights connecting major cities in Africa
    - Failing in meeting international quality standards

# Challenges for Southern Africa

3. **Absence of Strategically-Integrated Product Development and Marketing**
    - Quality/ Value for Money/ Sustainably Produced and Supplied

4. **Visa Restrictions**
    - Pan-African passport
    - Ensure there's adequate supply of security

5. **Inadequate Resources to Support to Tourism**

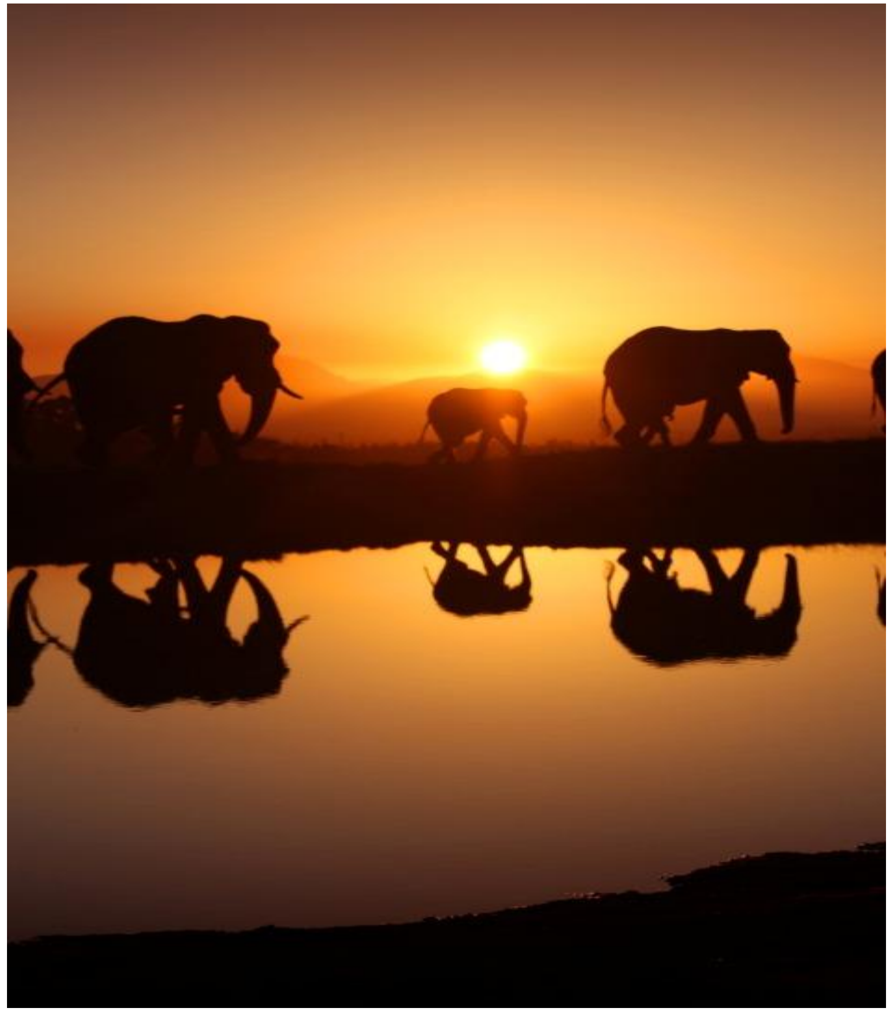
6. **Brand Africa**
    - Poor representation and negative perceptions (poverty, strife, hunger, war, starvation, diseases ...)

# Challenges for Southern Africa

7. **Inadequate skills**
   - Lack of qualified human resources

8. **Regional Investment Promotion**
   - Lack of effective mechanisms to present investment opportunities
   - Bureaucracy

# INTRA-REGIONAL AND INTER-REGIONAL TRADE IN TOURISM SERVICES WILL BE KEY IN DETERMINING AFRICA AND SOUTHERN AFRICA's GROWTH TRAJECTORY.



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## THANK YOU