5. Implementation of the General Programme of Work:

   c) Targeting emerging markets

1. Recent tourism trends in the region suggest that there may be a number of untapped development opportunities in major emerging markets that require the attention of National Tourism Administrations in the region. These include, in particular, the rapidly growing Chinese outbound market, sub-Saharan Africa and the intraregional Arab market.

   A. Unleashing Tourism’s potential between China and the Arab world

2. China, which became the top tourism market by expenditure in 2012 taking over from Germany and the United States, increased the number of Chinese travelling abroad to 98 million in 2013 up from 83 million in 2012 (+18%). Together they spent a record US$ 129 billion in destinations around the world, a 26% surge over 2012 when expenditure amounted to US$ 102 billion. Boosted by rising disposable incomes, fewer restrictions on foreign travel and an appreciating currency, Chinese tourism spending abroad has increased almost tenfold in 13 years, from US$ 13 billion in 2000 to US$ 129 billion in 2013, equivalent to an average growth rate of 19% per year.

3. A study of Chinese Outbound Travel to the Middle East and North Africa, published by UNWTO earlier this year, indicates that the number of Chinese tourist arrivals in the MENA countries is still very modest, representing less than 1% of total arrivals in that region. However, in percentage terms, the growth over the past 12 years has been impressive. Between 2000 and 2012 tourist arrivals from China increased more than fivefold, growing an average 19% annually.

4. The study outlines the main characteristics of Chinese travellers to MENA countries, identifies factors constraining Chinese outbound travel to the region, assesses future prospects and formulates recommendations on measures to be taken, particularly in raising awareness on destinations products and programmes, cooperating with Chinese tour operators, creating and reinforcing destination brands and communicating to potential customers and the travel trade.

5. A roundtable including NTA officials and private stakeholders from the Africa/Middle East regions and China will be organized by the China National Tourism Administration, jointly with
UNWTO, in the framework of the China International Travel Mart (CITM) on 13 November 2014, in Shanghai. It will consider ways and means of implementing these recommendations with a view to unleashing tourism’s potential between China and the Arab World. The provisional programme of this event is attached as Annex I.

6. Members of the Commission are invited to consider their participation in this important event and take, in due course, the necessary measures to this end. Additional information on the event will be provided shortly by the Secretariat.

B. Seizing Tourism development opportunities between Africa and the Arab world

7. The Middle East and Africa have been among the world’s fastest growing regions over the past decade. Moreover, tourism flows and investments between the two regions have increased significantly in the past few years. Tourist arrivals from the Middle East to Africa, in particular North Africa, have grown from 0.8 million to 3.1 million between 1995 and 2013, an annual growth rate of 8% and corresponding to a market share of 9%. Tourism flows from Africa to the Middle East have also increased by 8% annually between 1995 and 2013, growing from 0.6 million to 2.3 million and corresponding to a market share of 9%.

8. Along the lines of the Chinese outbound market project, UNWTO plans to produce a snapshot report that analyses tourism trends and prospects between Africa and the Arab World and identifies main constraining factors, as well as development opportunities. The Organization also plans to convene a Ministerial Conference to consider the findings of this report and take the necessary policy decisions, particularly on key issues such as visa facilitation, air connectivity, product development, quality assurance, consumer protection and investment promotion. The conference is tentatively scheduled for March 2015.

9. Members of the Commission are invited to express their interest in the abovementioned preliminary proposal.

C. Developing and promoting intraregional tourism

10. At a recent meeting of the League of Arab States Expert Group on the Arab Tourism Strategy, UNWTO suggested that the implementation of the strategy should focus, over the coming five years (2015-2019), on the development and promotion of intraregional tourism, due to its low share (42% of total international arrivals) in comparison to that experienced in other regions such as Europe, Asia and the Americas (which accounts for over 70% of total arrivals). The main factors constraining the development of intraregional tourism in the Arab world were identified as follows:

   a. Poor cross border access and transportation connectivity
   b. Narrow and poorly adapted tourism product base designed to meet the needs of the intraregional market
   c. Inadequate marketing and promotions at the country and regional level
   d. Poor quality of tourism facilities and services, compared to that offered by competing destinations in other regions
   e. Lack of comprehensive, reliable, comparable and timely tourism statistics and economic impact data
   f. Limited tourism investment promotion
   g. Tourism education and training institutional policies and programmes that do not meet
the industry’s need for qualified staff
h. Limited skills of NTA officials to effectively implement programmes and projects to address the above constraints

11. The Secretariat plans to organize a Ministerial roundtable on the development of intraregional tourism, in the framework of the Arabian Travel Market (ATM) scheduled for 4-7 May 2015 at Dubai. The roundtable may focus on the following three immediate objectives identified in the project proposal for the implementation of the Arab Tourism Strategy, prepared by UNWTO, in consultation with the Ministry of Tourism of Egypt and the Secretariats of the League of Arab States and the Arab Tourism Organization:

a. Increasing access and connectivity between tourism generating markets and destinations in Arab countries
b. Developing and marketing more inclusive intra-Arab destinations, products, facilities and services
c. Enhancing institutional capacities to monitor and evaluate regional tourism cooperation strategies and initiatives

12. Members of the Commission are invited to decide on the abovementioned proposal.

Paragraphs for decision: 6, 9 and 12