

European air travel in developing countries

Focus on CBI Priority countries

May 2019

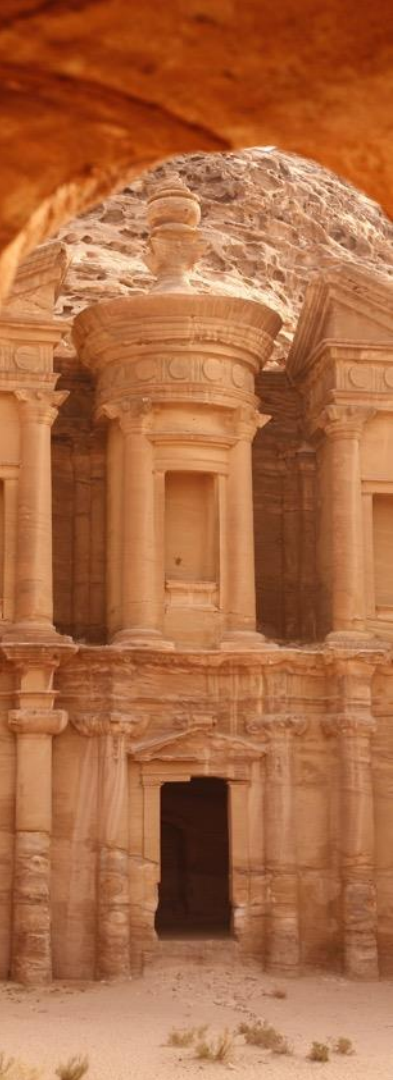


CBI
Ministry of Foreign Affairs



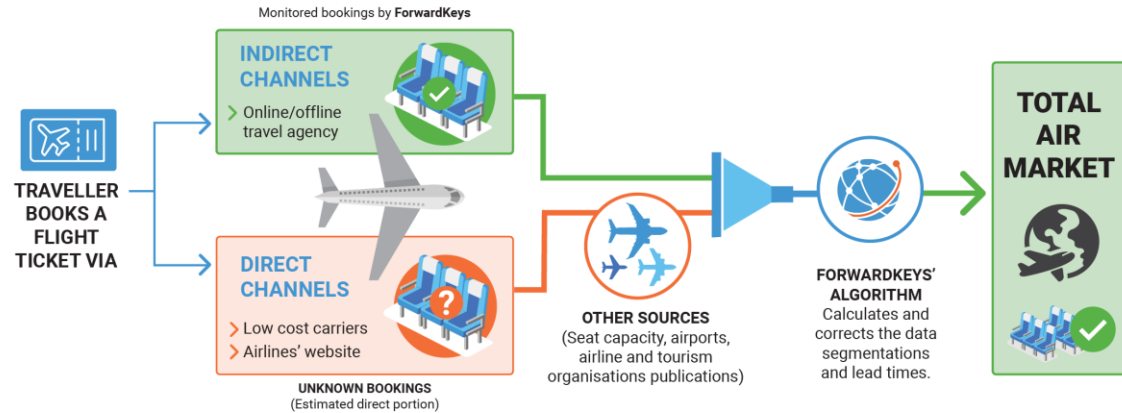
INDEX

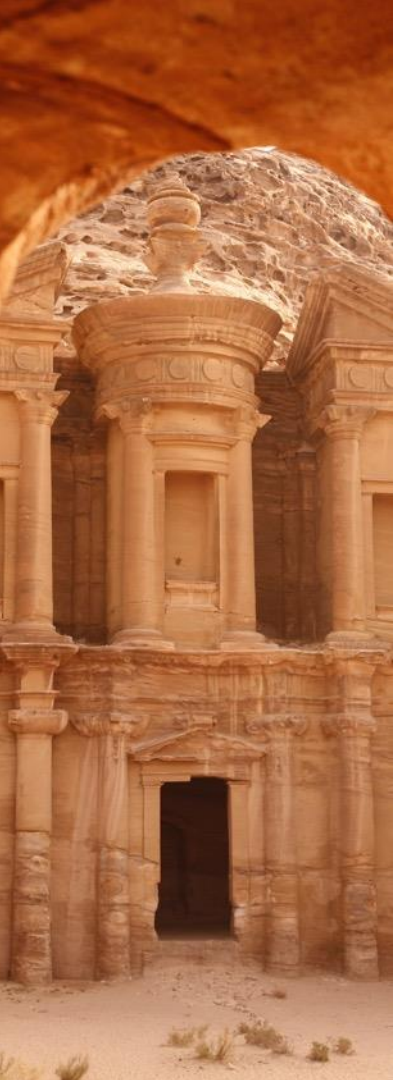
1. Methodology.
2. European travel to CBI priority countries.
3. Focus on top 10 CBI priority countries.
4. European travel: DAC list of ODA recipients.



METHODOLOGY

- The total volume of travellers is an estimation based on the bookings processed by the major GDS (Global Distribution Systems), flight routes and other data sources, including official air traffic statistics from key players (airports, airlines, border control and immigration offices).





METHODOLOGY

- The information contained in this report refers to air travel on scheduled flights. The total traveller estimation does not include travellers arriving by means of transport other than regular flights; this includes charter flights and surface transports (car, train, cruise, etc.).
- Analysis carried out based on 2019MY (May 2018 to April 2019).
- The air travel forecast for 2020MY (May 2019 to April 2020) is based on current market information, considering booking and arrival patterns from the three previous years and current forward bookings to travel in the following months, and it has been adjusted with scheduled air capacity data.
- Developing countries: as per DAC list of ODA recipients (146); CBI priority country list (24 of ODA-recipient destinations); Europe: EU-28 (28) + EFTA (4).
- Arrivals considering visitors staying at least 1 night at the destination.



European travel to CBI Priority Countries

May 2018 to April 2019, forecast until April 2020

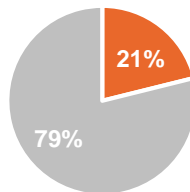


Overview: European air arrivals in CBI and ODA countries

OECD category	No. of countries	European arrivals in 2018MY (thousands)	European arrivals in 2019MY (thousands)	Forecast for arrivals in 2020MY (thousands)	YOY variation
ODA recipients	143	58,503.9	64,615.6	66,673.0	
CBI countries	24	11,946.4	13,650.4	14,070.4	

Distribution of arrivals in 2019MY

- CBI countries
- Rest of ODA recipients



■ 2019MY

■ Forecast 2020MY

2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.


Visitors staying at least 1 night at destination


Ranking based on total regular air transportation estimation; non-regular flights not included.


CBI priority countries: Ranking of European tourist arrivals (I)

Top 1 to Top 10 destinations by European air arrivals

Share of leisure travel	Arrivals in 2019MY (thousands)	YOY	Share of CBI	Forecast of arrivals in 2020MY (thousands)	YOY	Share of CBI Forecast
79%	1. Morocco 4.697,1	10.1%	34.4%	1. Morocco 4.934,4	5.1%	35.1%
83%	2. Egypt 2.921,8	40.1%	21.4%	2. Egypt 2.952,1	1.0%	21.0%
76%	3. Tunisia 1.350,7	22.0%	9.9%	3. Tunisia 1.444,4	6.9%	10.3%
59%	4. Algeria 1.325,3	-7.2%	9.7%	4. Algeria 1.304,0	-1.6%	9.3%
59%	5. Kenya 558,0	23.0%	4.1%	5. Kenya 567,3	1.7%	4.0%
62%	6. Lebanon 487,5	7.6%	3.6%	6. Lebanon 497,9	2.1%	3.5%
41%	7. Senegal 445,4	-2.3%	3.3%	7. Senegal 462,7	3.9%	3.3%
72%	8. Jordan 415,2	42.6%	3.0%	8. Jordan 428,6	3.2%	3.0%
32%	9. Nigeria 364,4	1.0%	2.7%	9. Nigeria 360,6	-1.0%	2.6%
28%	10. Ghana 287,8	-0.9%	2.1%	10. Ghana 297,7	3.4%	2.1%

 2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.

 Visitors staying at least 1 night at destination

 Ranking based on total regular air transportation estimation; non-regular flights not included.

CBI priority countries: Ranking of European tourist arrivals (II)

Top 11 to Top 24 destinations by European air arrivals

Share of leisure travel	Arrivals in 2019MY (thousands)		YOY		Share of CBI		Forecast of arrivals in 2020MY (thousands)		YOY		Share of CBI Forecast	
	Rank	Country	Arrivals	YOY	Share of CBI	Rank	Country	Arrivals	YOY	Share of CBI Forecast		
34%	11.	Ethiopia	218,1	24.4%	1.6%	11.	Ethiopia	230,9	5.9%	1.6%		
26%	12.	Ivory Coast	143,7	0.0%	1.1%	12.	Ivory Coast	144,4	0.5%	1.0%		
18%	13.	Mali	100,7	4.2%	0.7%	13.	Mali	103,5	2.7%	0.7%		
41%	14.	Uganda	98,8	2.1%	0.7%	14.	Uganda	102,7	4.0%	0.7%		
33%	15.	Rwanda	59,3	2.8%	0.4%	15.	Rwanda	60,6	2.2%	0.4%		
26%	16.	Burkina Faso	51,6	-8.1%	0.4%	16.	Burkina Faso	52,5	1.7%	0.4%		
22%	17.	Guinea	39,3	3.6%	0.3%	17.	Guinea	41,4	5.4%	0.3%		
33%	18.	Sierra Leone	27,4	-15.6%	0.2%	18.	Sierra Leone	26,7	-2.8%	0.2%		
33%	19.	Mauritania	24,2	1.5%	0.2%	19.	Mauritania	24,0	-0.7%	0.2%		
27%	20.	Niger	15,0	14.1%	0.1%	20.	Niger	14,7	-1.8%	0.1%		
22%	21.	Chad	11,8	3.7%	0.1%	21.	Chad	11,9	0.9%	0.1%		
20%	22.	Liberia	6,3	-11.8%	0.0%	22.	Liberia	6,4	1.0%	0.0%		
55%	23.	Libya	0,9	-13.5%	0.0%	23.	Libya	0,9	0.4%	0.0%		
0%	24.	Palestine	-	0.0%	0.0%	24.	Palestine	-	0.0%	0.0%		

2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.



Focus on top 10 CBI priority countries



Top 10 CBI Priority countries by European tourist arrivals

1



Morocco

34%

2



Egypt

21%

3



Tunisia

10%

4



Algeria

10%

5



Kenya

4%

6



Lebanon

4%

7



Senegal

3%

8



Jordan

3%

9



Nigeria

3%

10



Ghana

2%

*Share of European arrivals
in CBI priority countries*

*Share of European arrivals
in CBI priority countries*

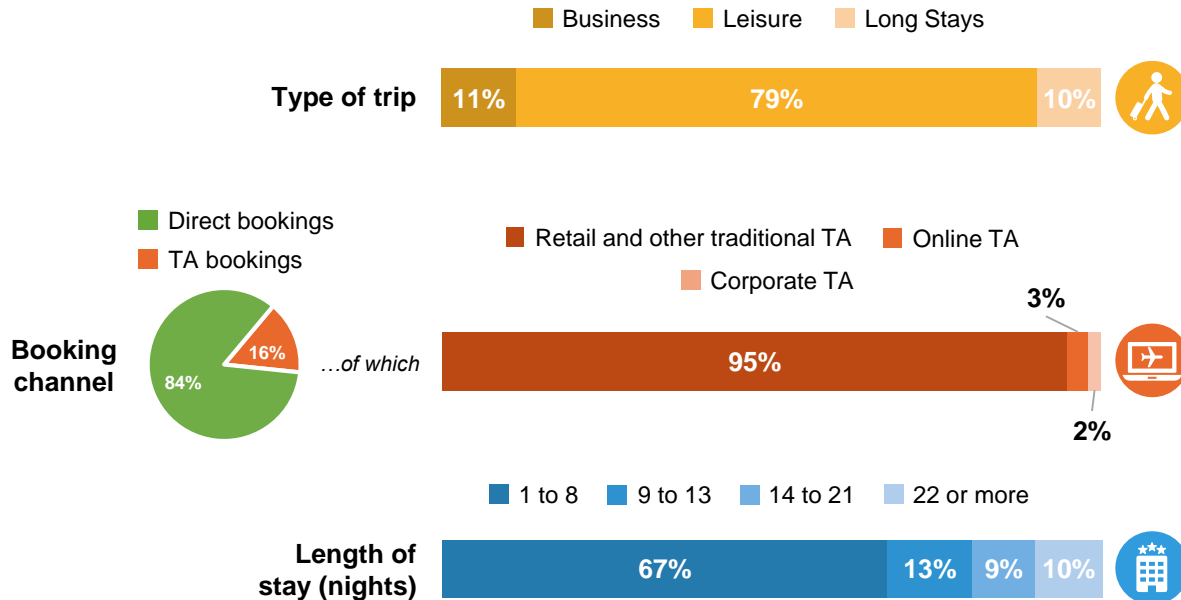


1. Morocco: Top source markets and traveller profile

Top origin countries

	Share
France	38%
Germany	11%
United Kingdom	10%
Spain	9%
Belgium	8%

Traveller profile (shares)



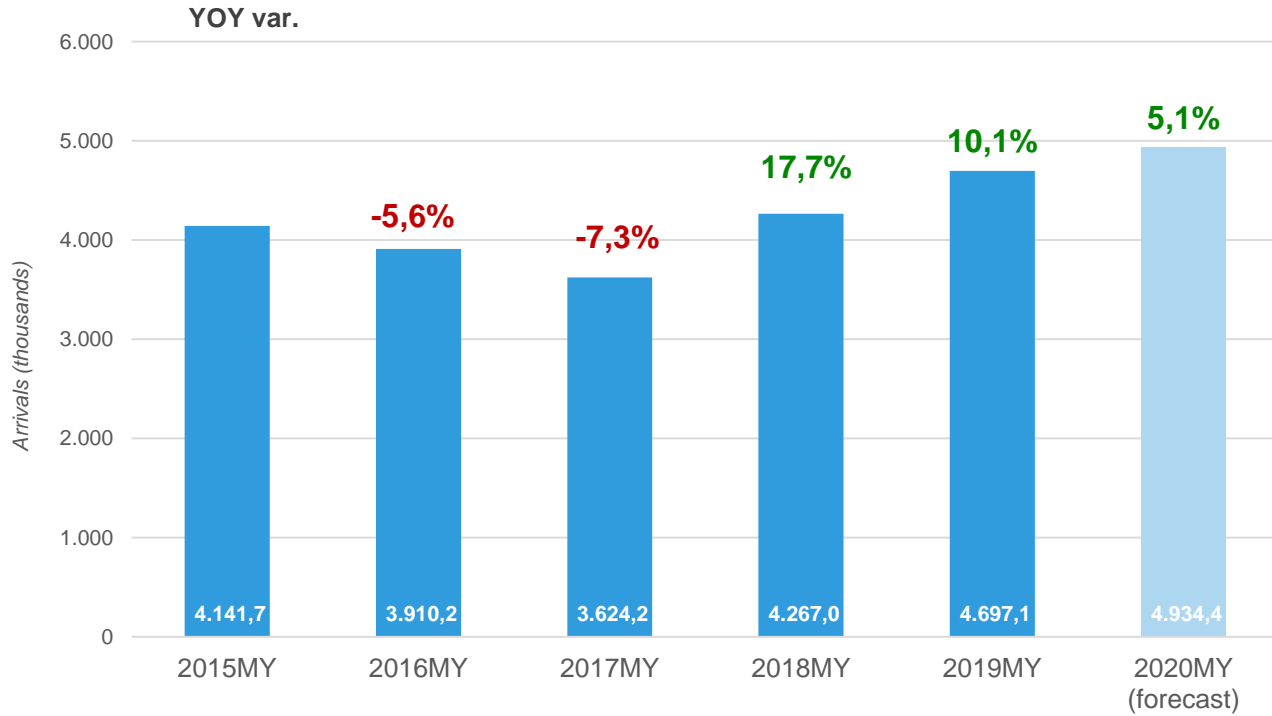
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



1. Morocco: Evolution of European visitor arrivals



European travellers share in 2019MY

34.4% of CBI Recipients

 Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.
  Visitors staying at least 1 night at destination.

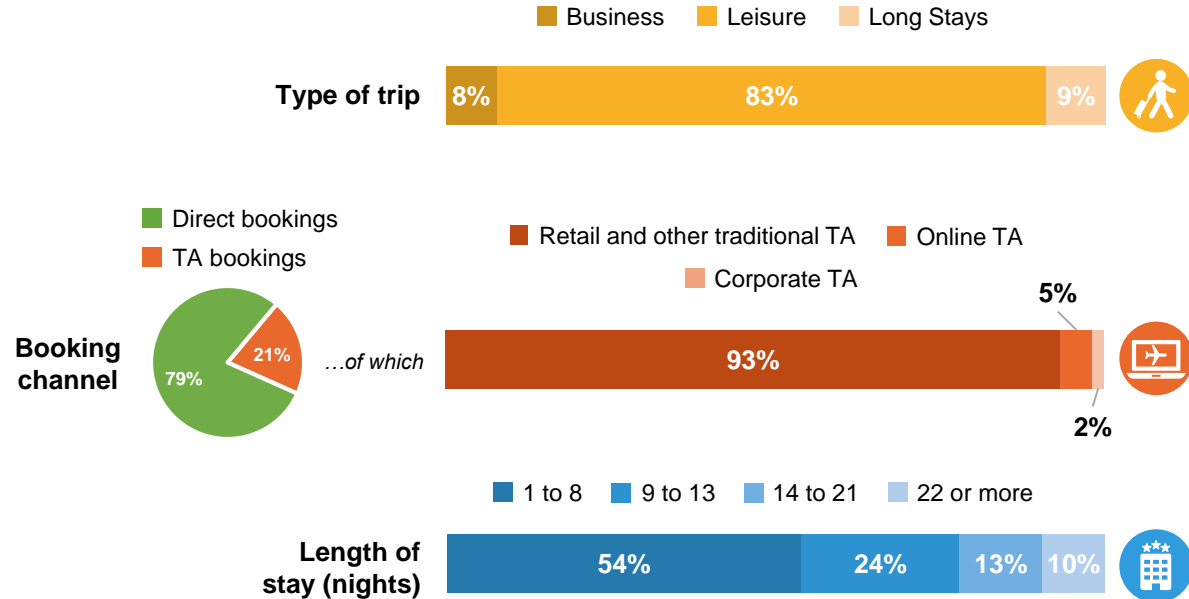


2. Egypt: Top source markets and traveller profile

Top origin countries

	Share
Germany	40%
United Kingdom	14%
Italy	12%
Czech Republic	5%
Poland	4%

Traveller profile (shares)



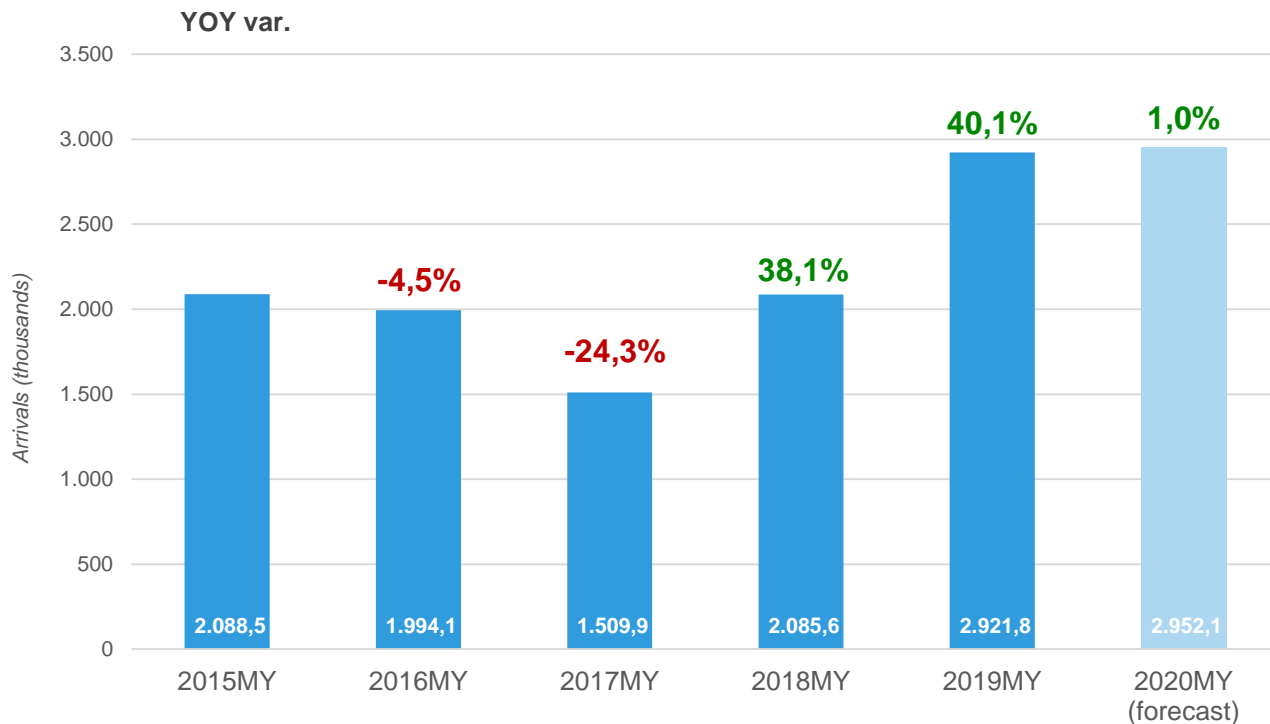
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



2. Egypt: Evolution of European visitor arrivals



European travellers share
in 2019MY

21.4% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

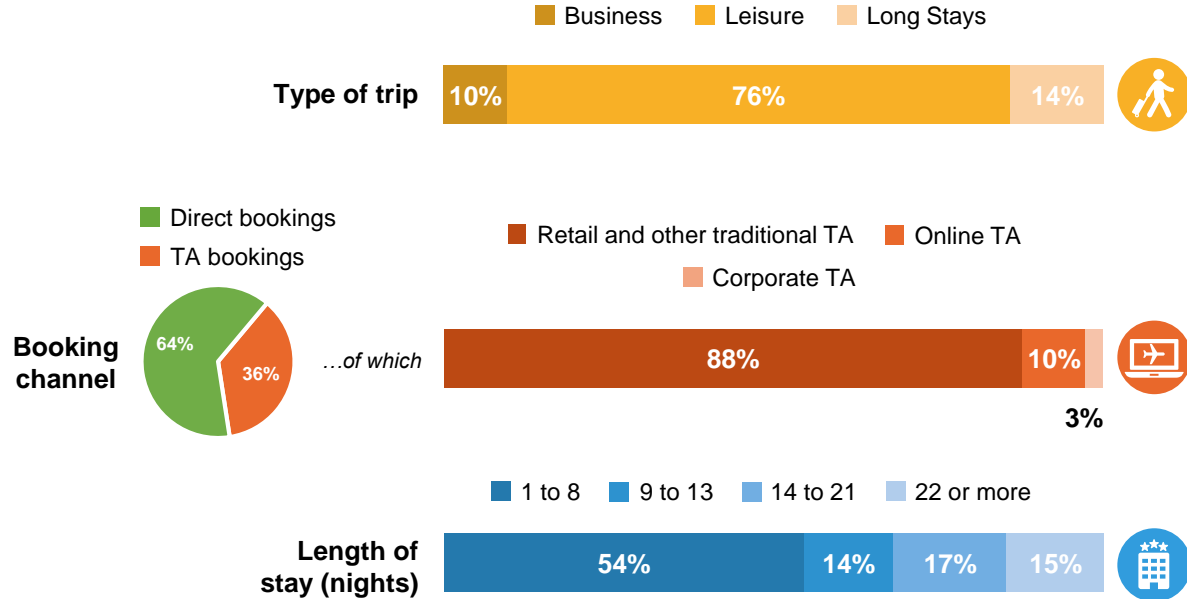


3. Tunisia: Top source markets and traveller profile

Top origin countries

	Share
France	53%
Germany	16%
Belgium	6%
Italy	6%
United Kingdom	6%

Traveller profile (shares)



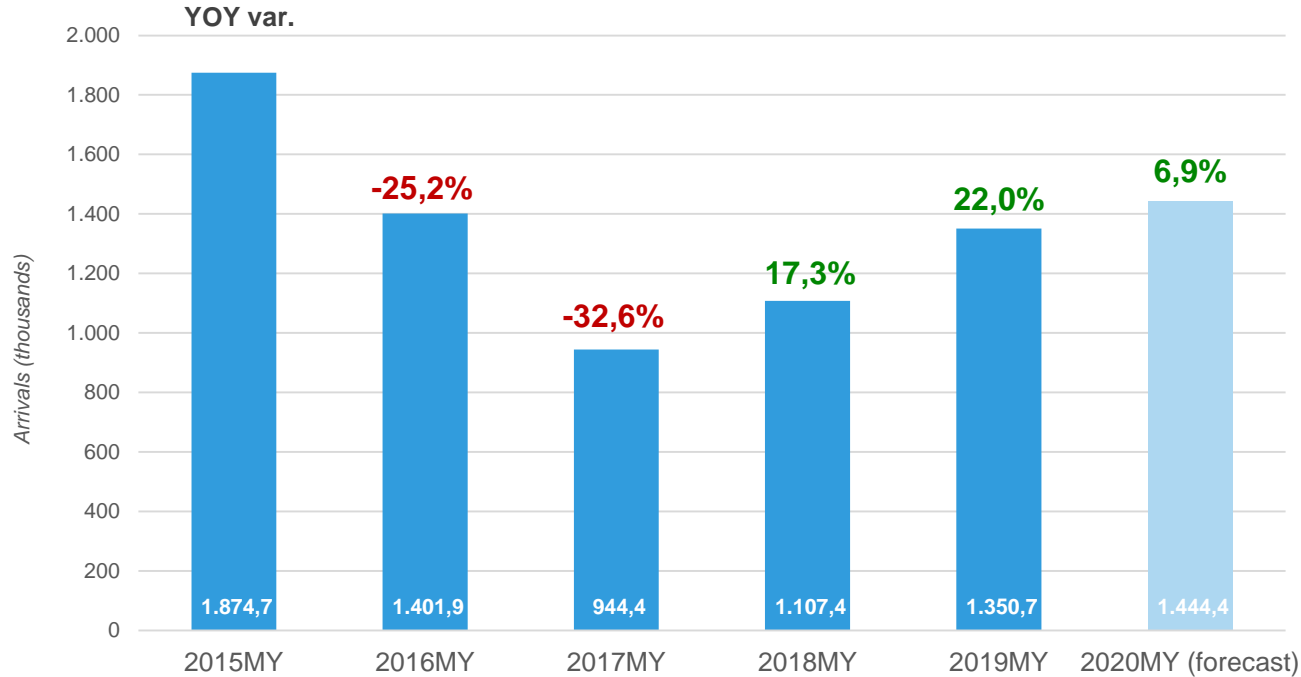
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



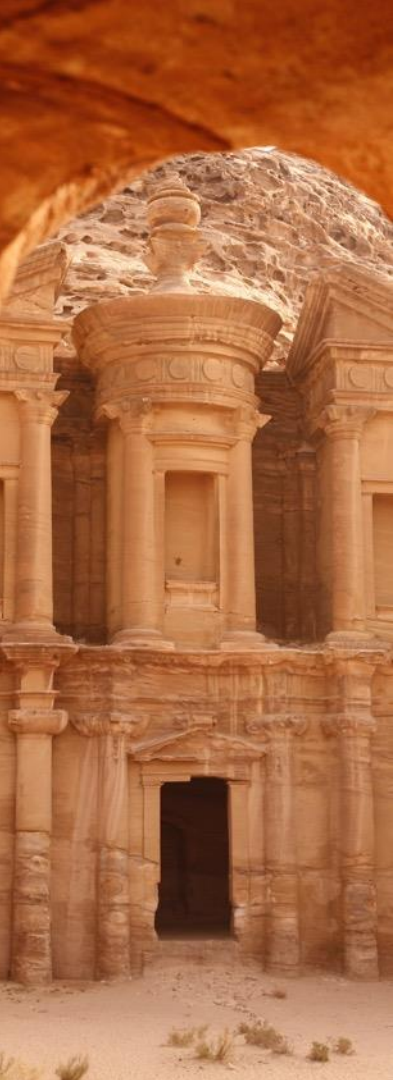
3. Tunisia: Evolution of European visitor arrivals



European travellers share
in 2019MY

9.9% of CBI Recipients

 Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.
  Visitors staying at least 1 night at destination.



Top 3 destinations: shared characteristics

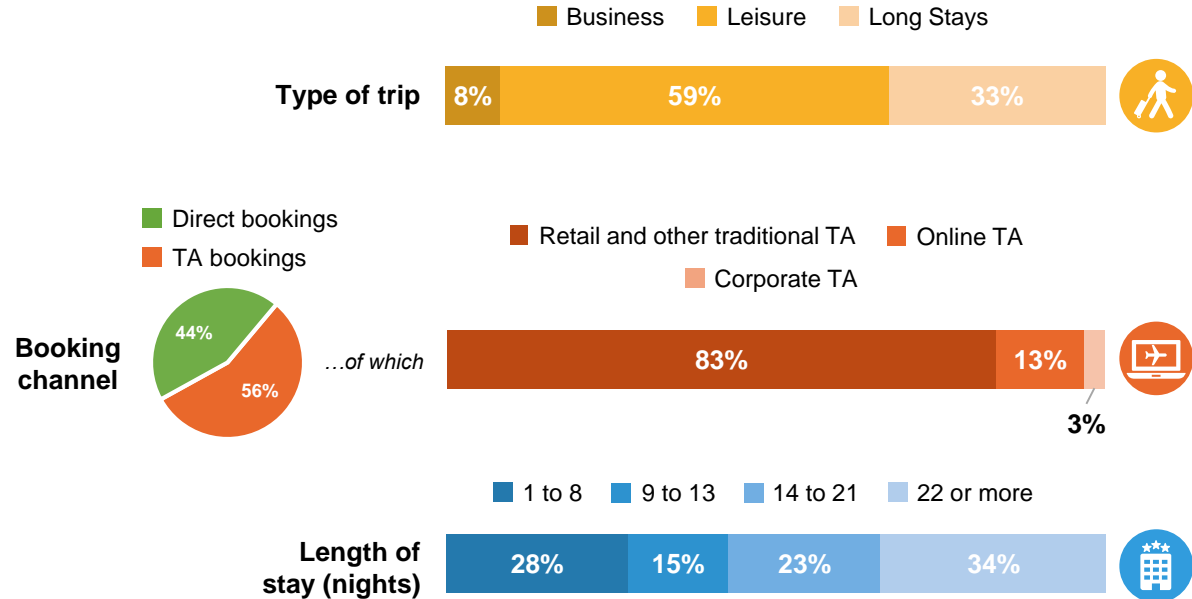
1. Leisure driven destinations.
2. Dependent on one major European source market.
3. Experienced a rebound in tourism in the last couple of years.
4. Their growth is expected to decelerate.

4. Algeria: Top source markets and traveller profile

Top origin countries

	Share
France	84%
United Kingdom	4%
Spain	3%
Belgium	3%
Germany	2%

Traveller profile (shares)

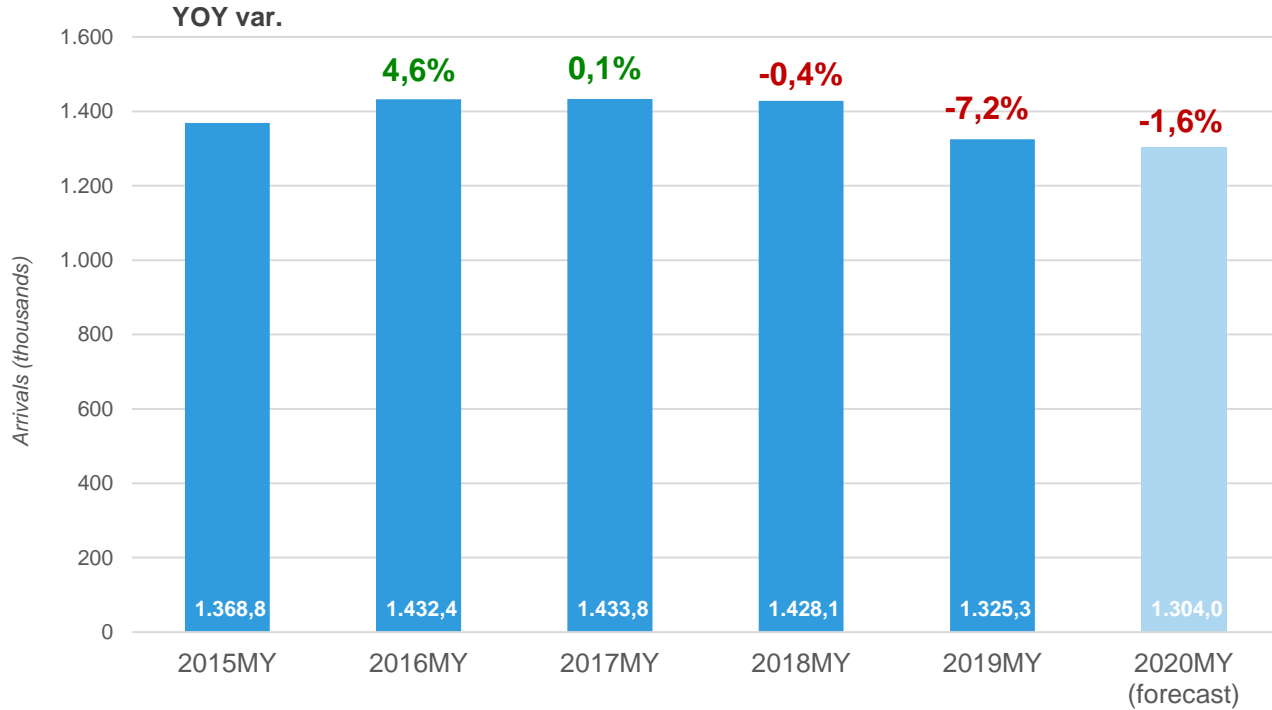


Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.

4. Algeria: Evolution of European visitor arrivals



European travellers share
in 2019MY

9.7% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

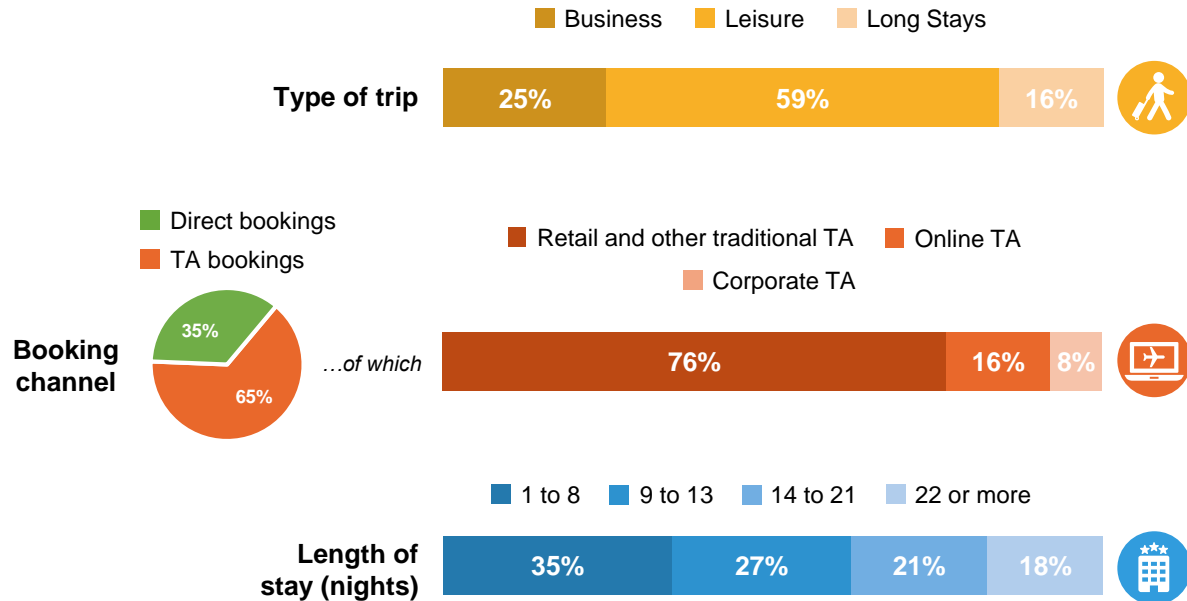


5. Kenya: Top source markets and traveller profile

Top origin countries

	Share
United Kingdom	30%
Germany	17%
Italy	10%
France	8%
Netherlands	7%

Traveller profile (shares)



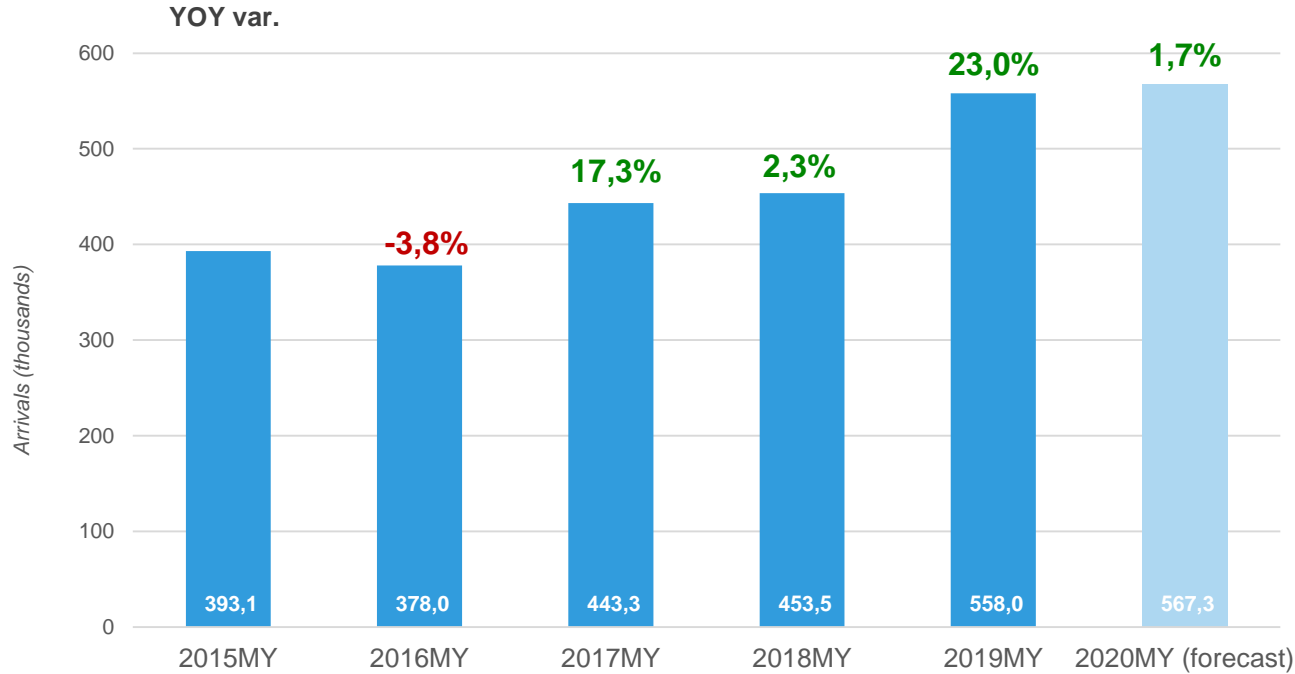
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



5. Kenya: Evolution of European visitor arrivals



European travellers share
in 2019MY

4.1% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

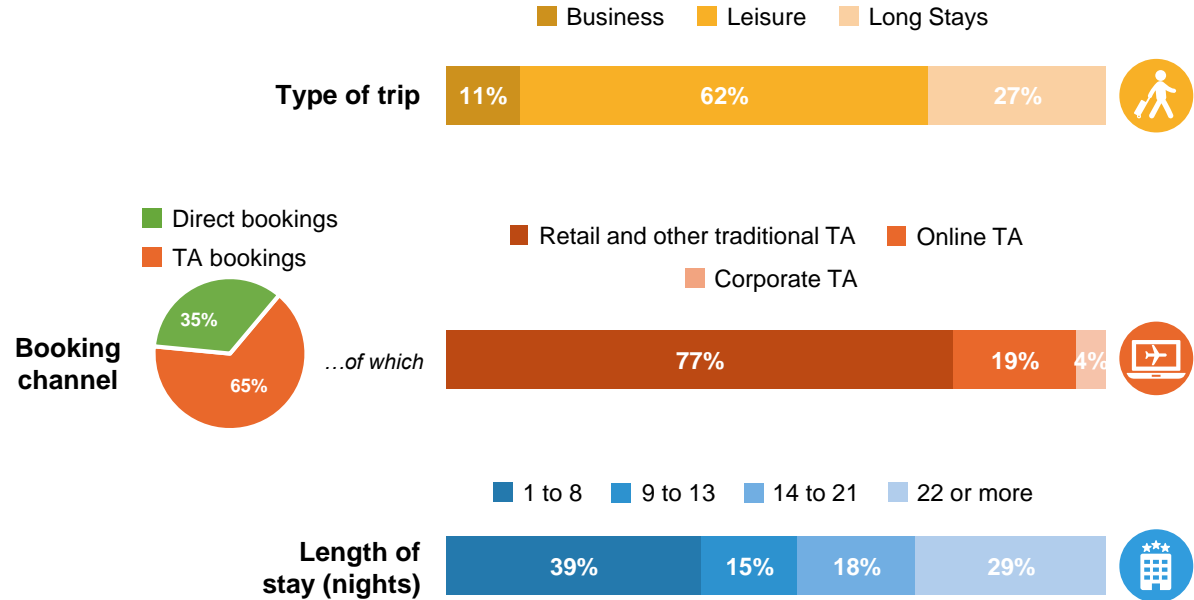


6. Lebanon: Top source markets and traveller profile

Top origin countries

	Share
Germany	22%
France	22%
United Kingdom	12%
Denmark	6%
Sweden	6%

Traveller profile (shares)



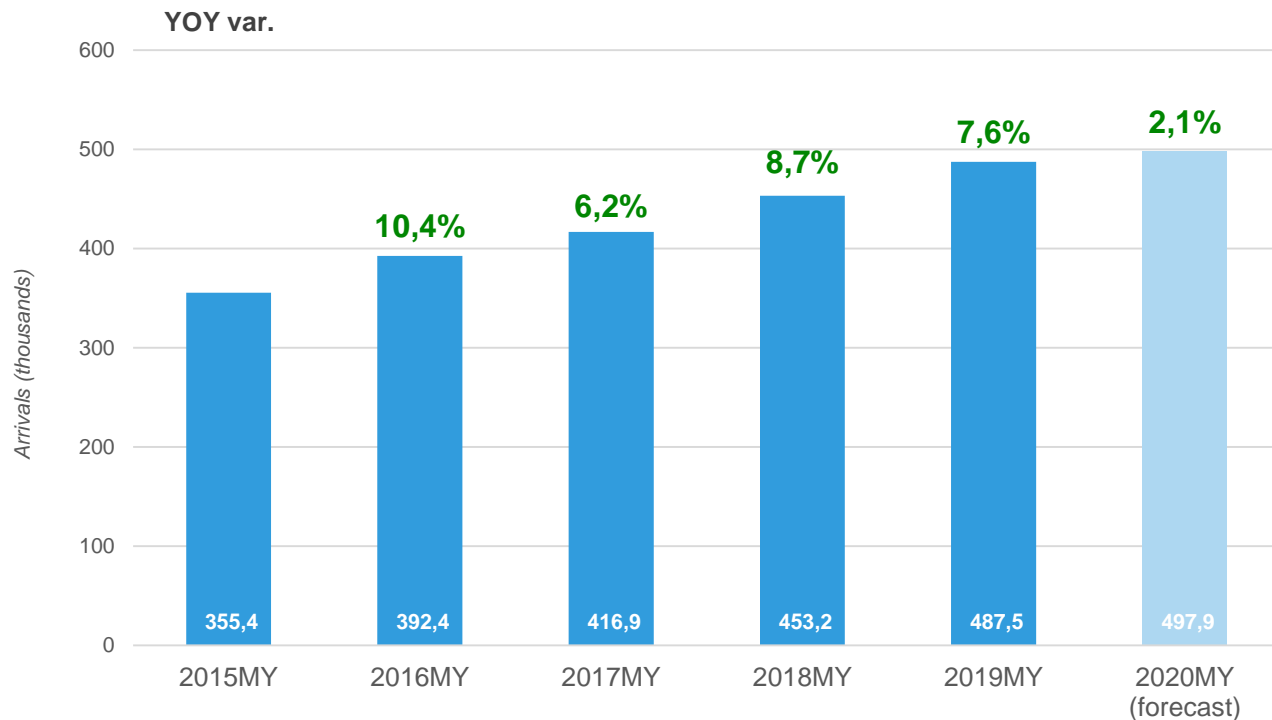
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



6. Lebanon: Evolution of European visitor arrivals



European travellers share
in 2019MY

3.6% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

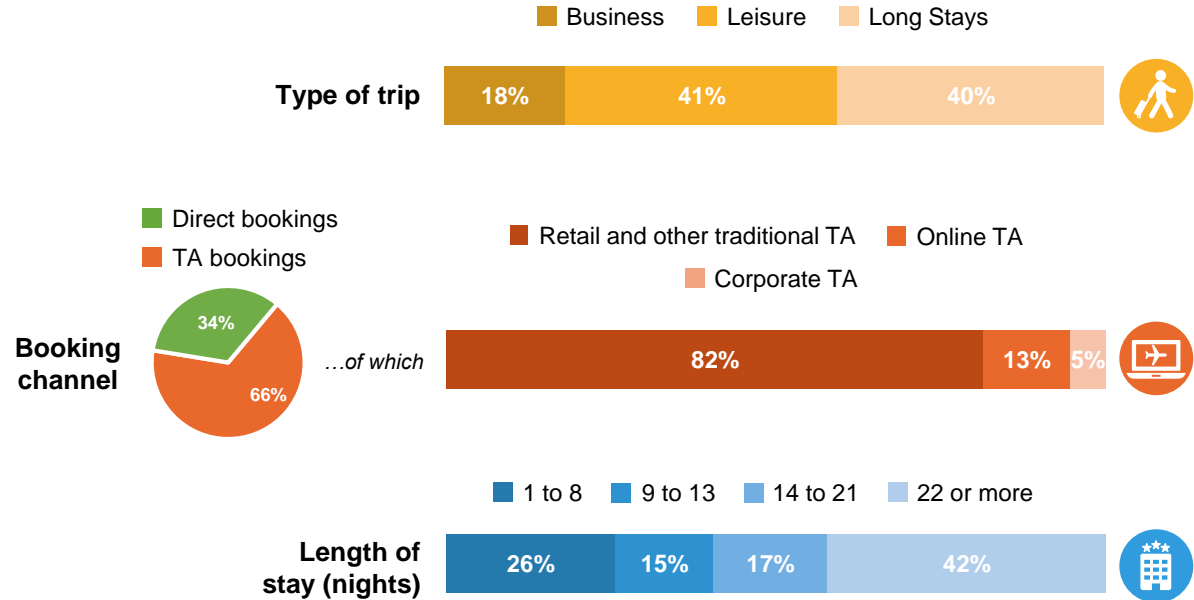


7. Senegal: Top source markets and traveller profile

Top origin countries

	Share
France	56%
Italy	16%
Spain	11%
Belgium	6%
Germany	3%

Traveller profile (shares)



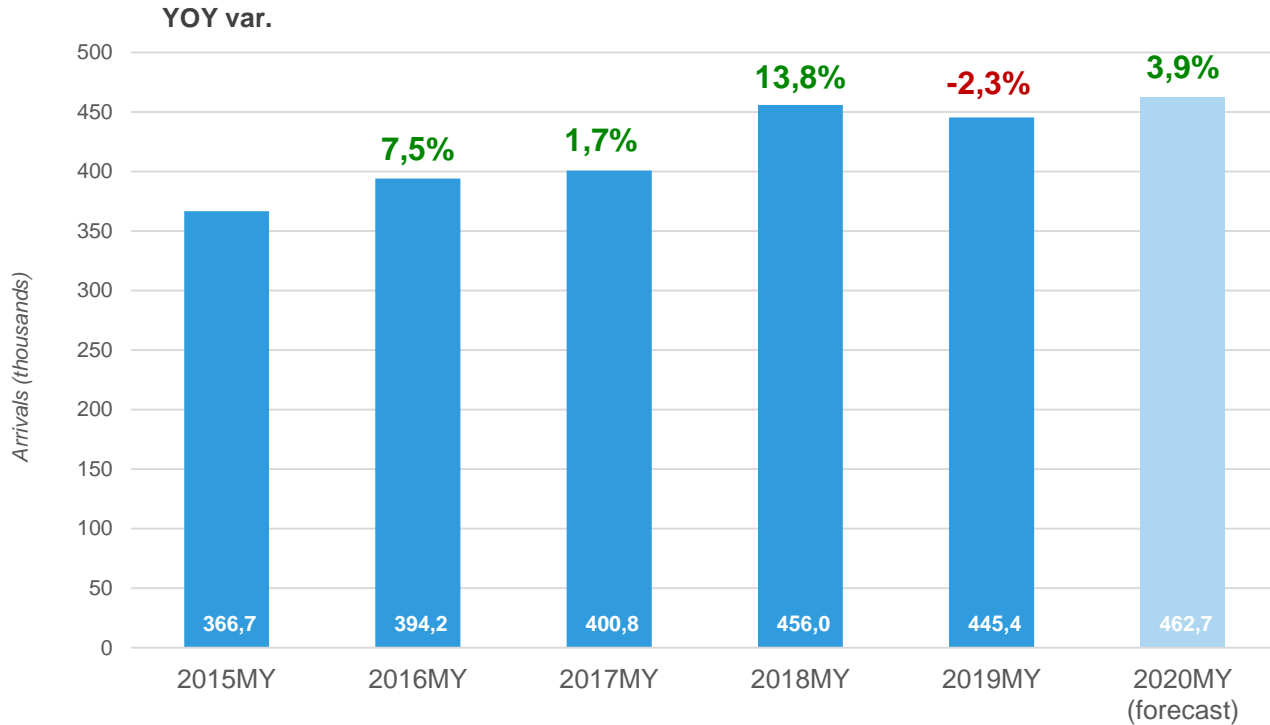
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



7. Senegal: Evolution of European visitor arrivals



European travellers share
in 2019MY

3.3% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

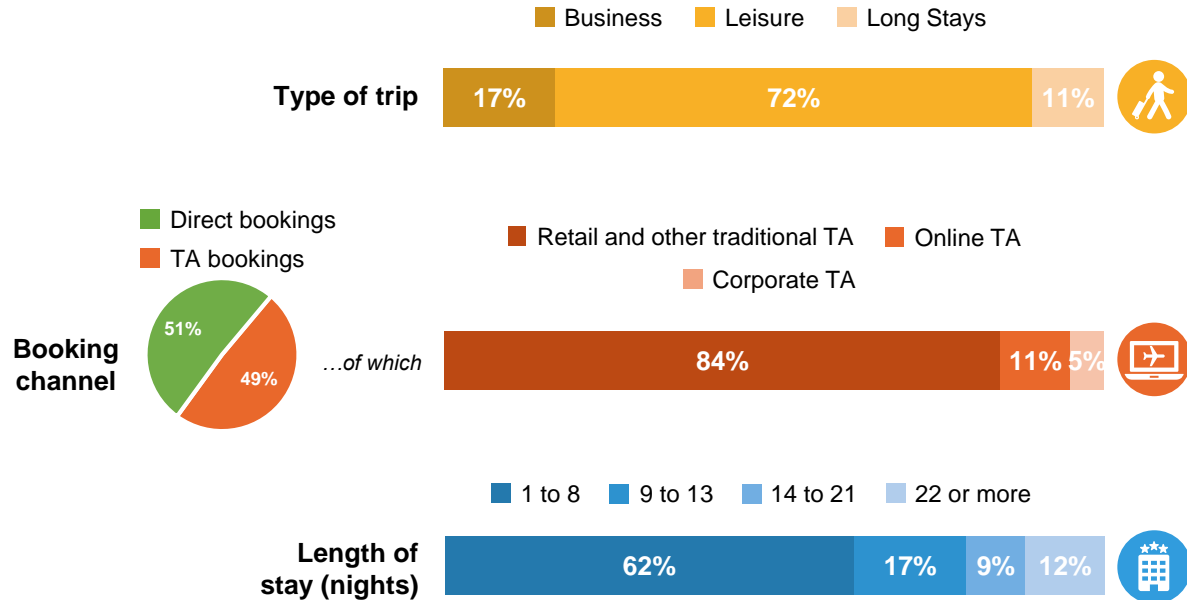


8. Jordan: Top source markets and traveller profile

Top origin countries

	Share
Germany	16%
United Kingdom	15%
Italy	11%
France	11%
Spain	8%

Traveller profile (shares)



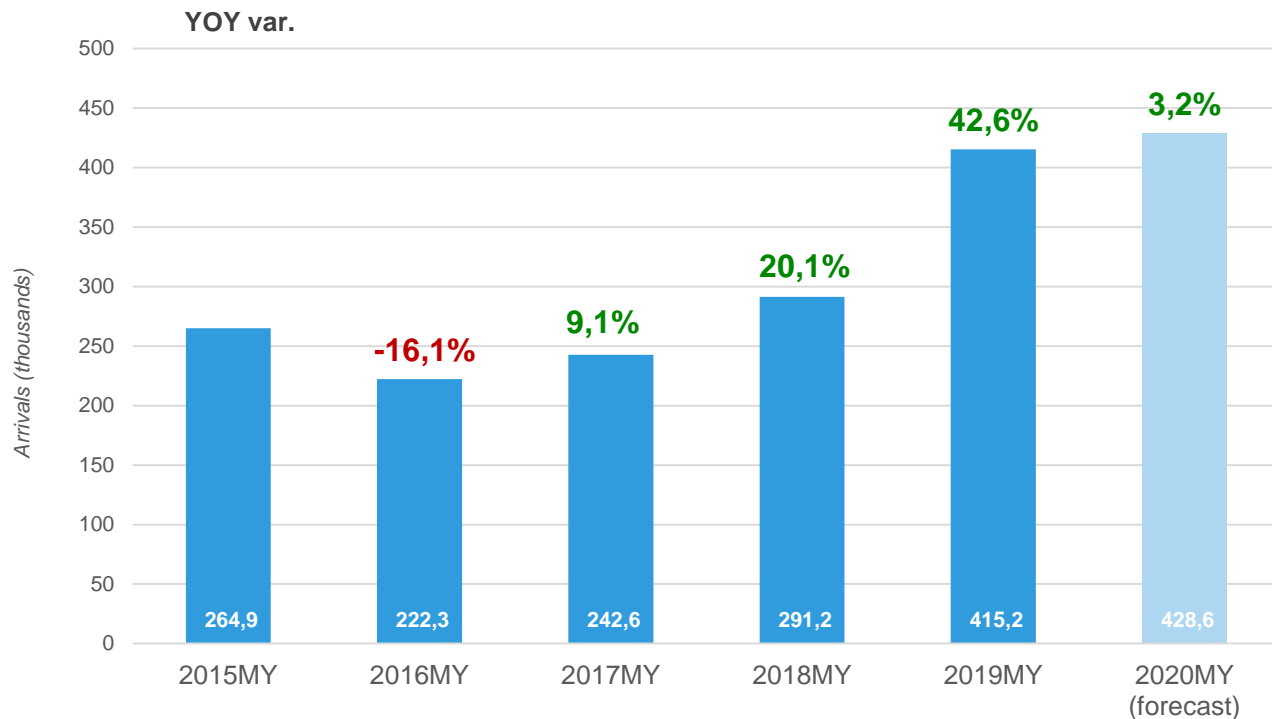
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



8. Jordan: Evolution of European visitor arrivals



European travellers share
in 2019MY

3.0% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



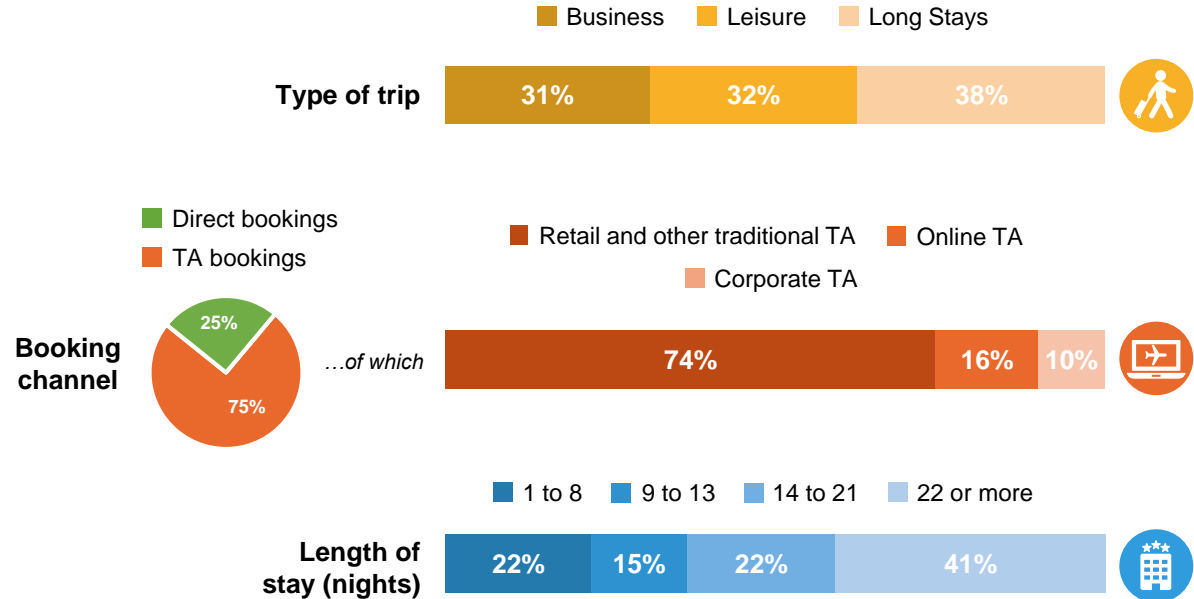
Visitors staying at least 1 night at destination.

9. Nigeria: Top source markets and traveller profile

Top origin countries

	Share
United Kingdom	49%
Italy	13%
Germany	11%
Spain	5%
Ireland	4%

Traveller profile (shares)

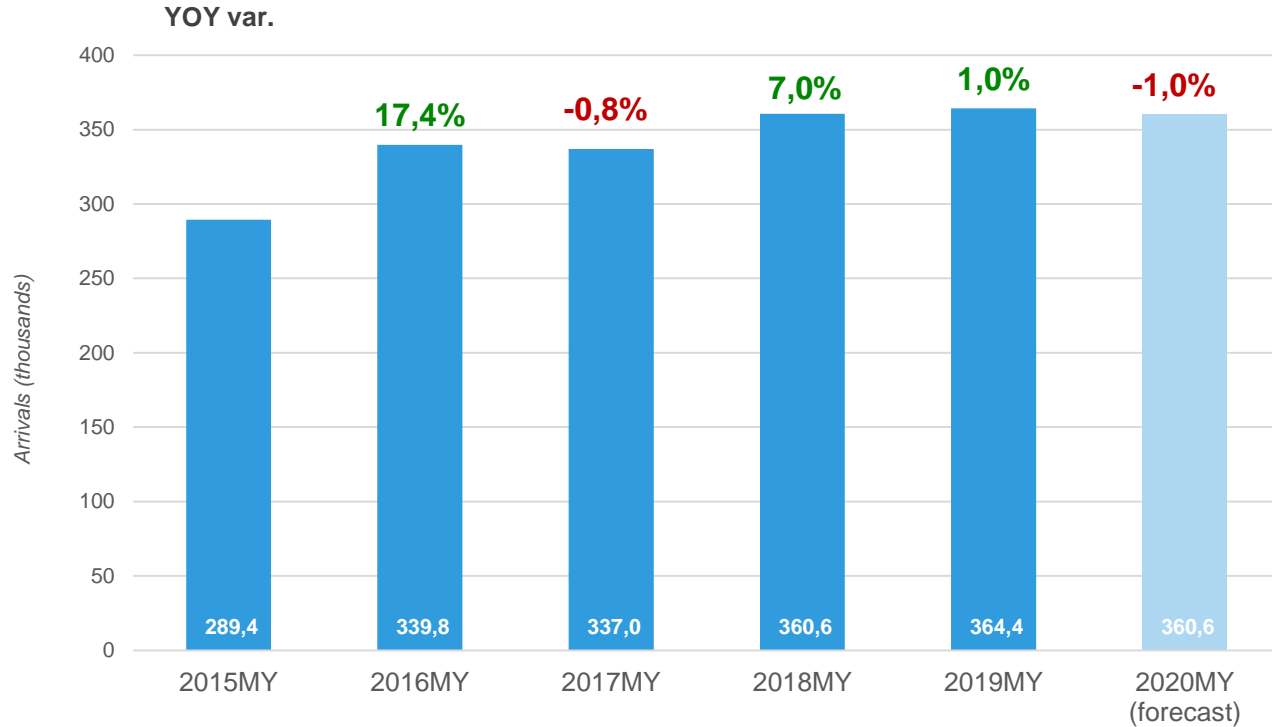


Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.

9. Nigeria: Evolution of European visitor arrivals



European travellers share
in 2019MY

2.7% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

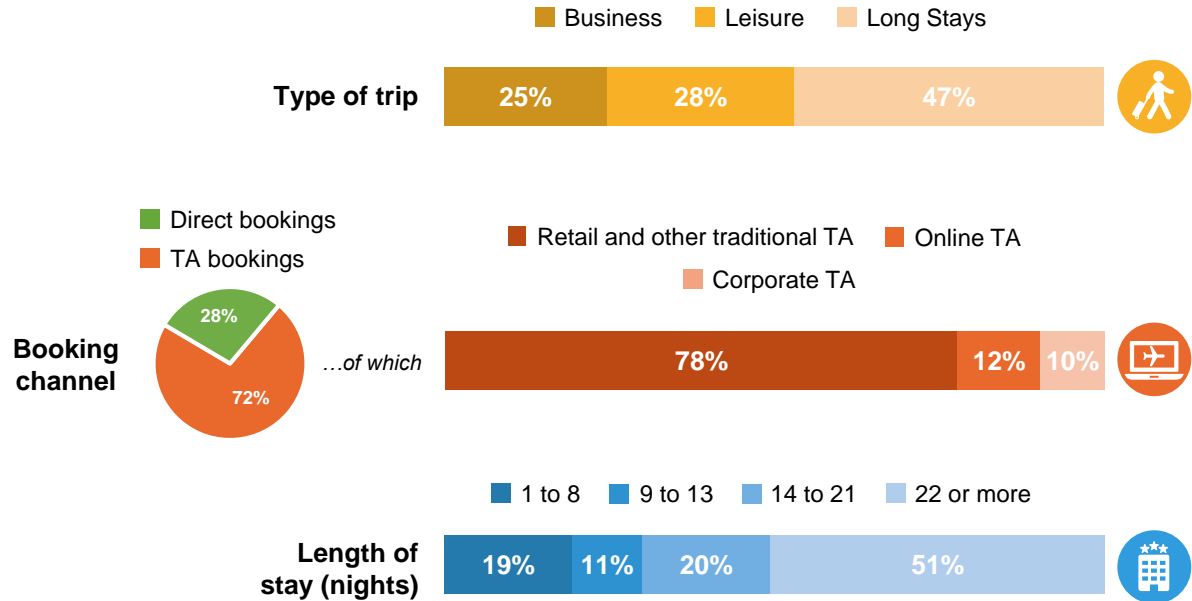


10. Ghana: Top source markets and traveller profile

Top origin countries

	Share
United Kingdom	39%
Germany	16%
Italy	9%
Netherlands	9%
France	7%

Traveller profile (shares)



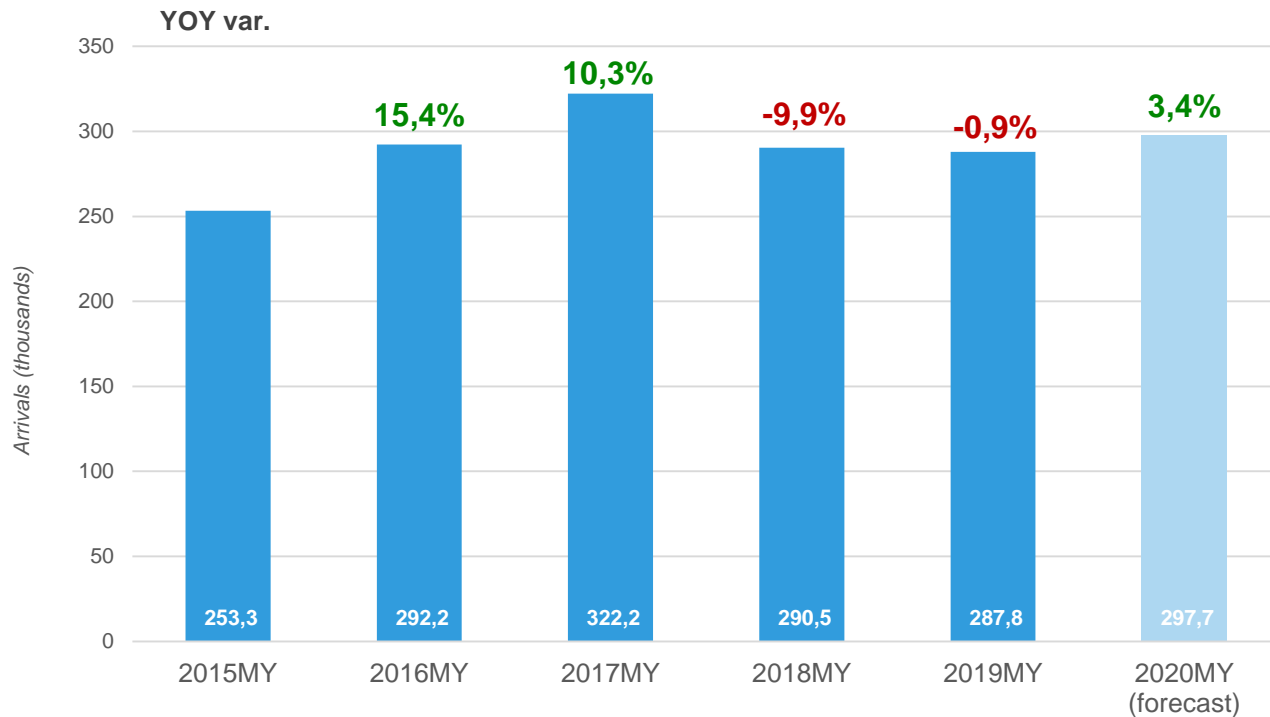
Arrivals from European countries between 1st May 2018 and 31st April 2019.



Visitors staying at least 1 night at destination.



10. Ghana: Evolution of European visitor arrivals



European travellers share
in 2019MY

2.1% of CBI Recipients



Arrivals from European countries from 1st May 2014 to 31st April 2019 and 1st May 2019 to 31st April 2020 forecast.



Visitors staying at least 1 night at destination.

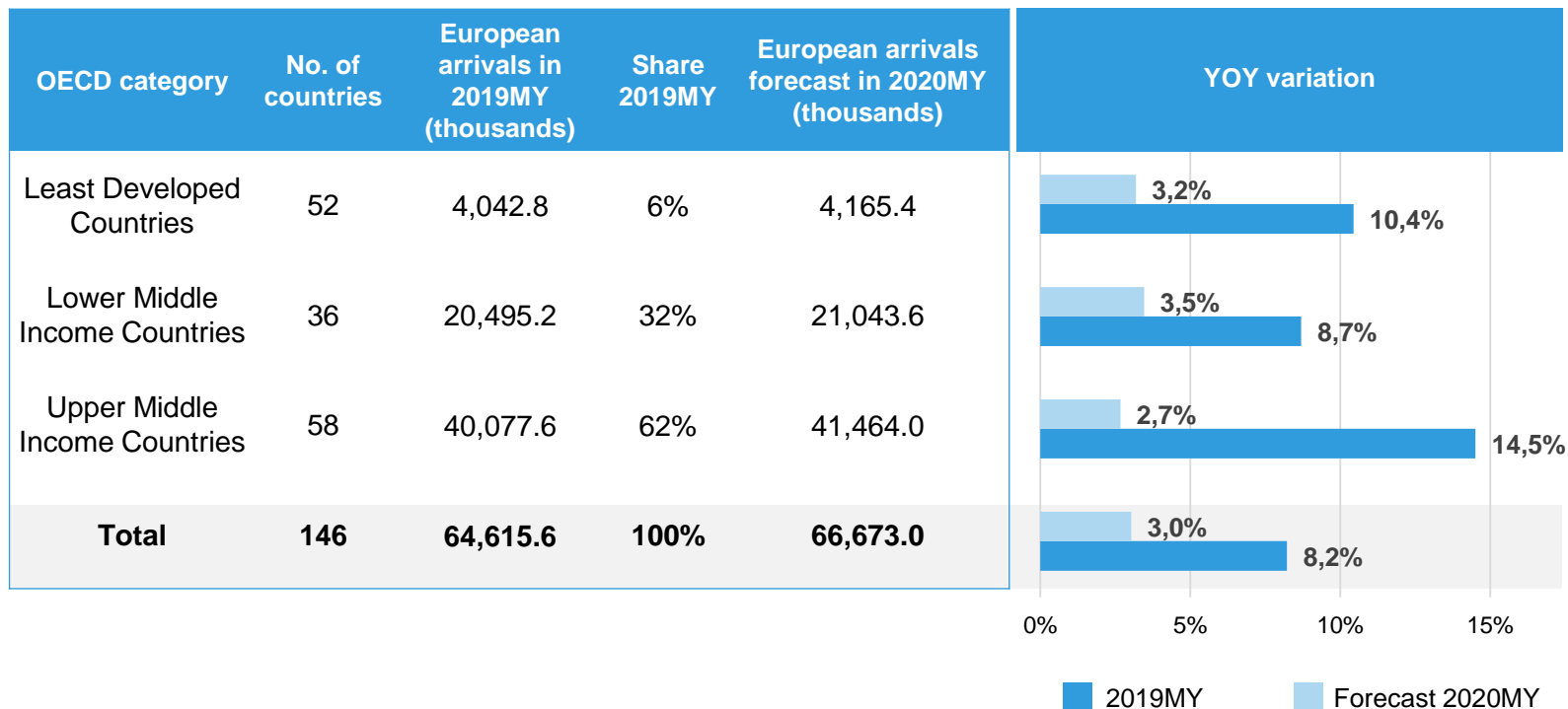


European travel: DAC List of ODA Recipients

May 2018 to April 2019, forecast until April 2020



European arrivals in OECD DAC list of ODA recipients



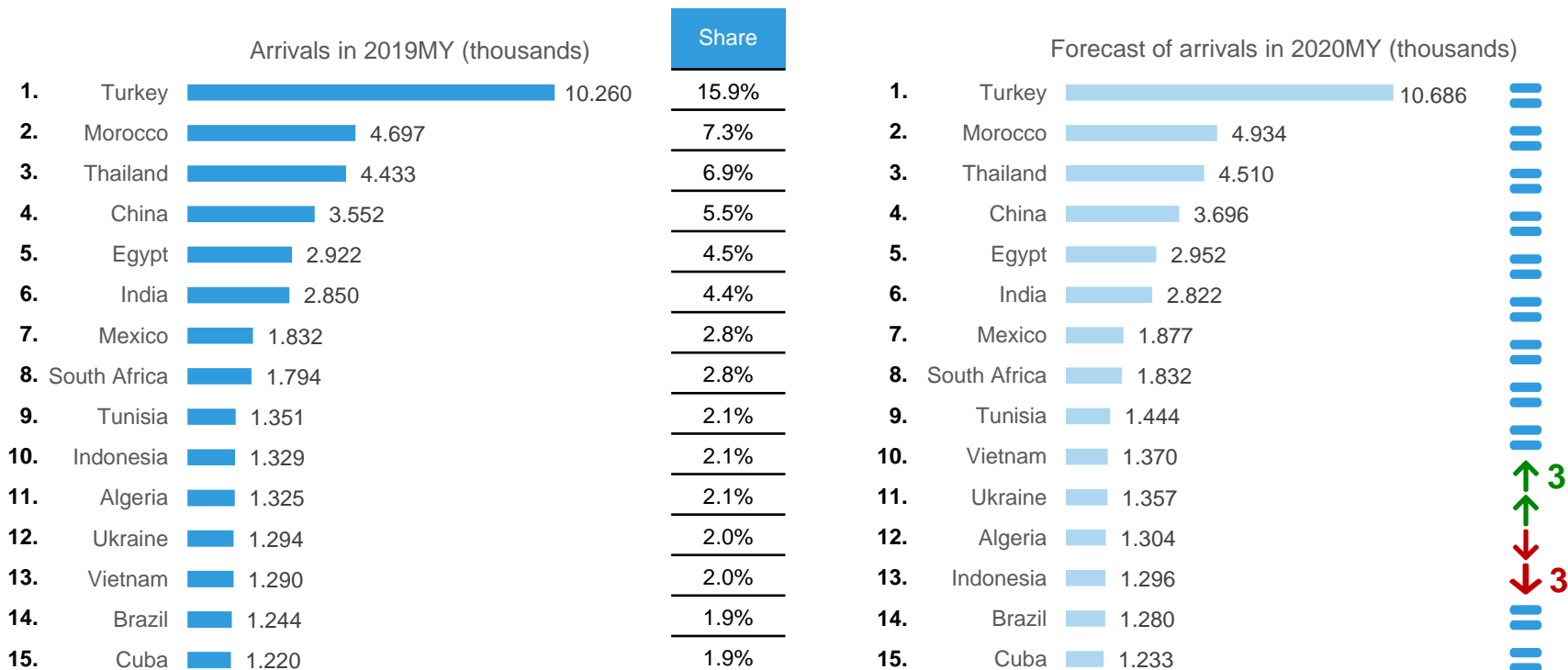
2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.

ODA recipients: top 30 destinations for European travellers (I)

Top 1 to Top 15 destinations by European air arrivals



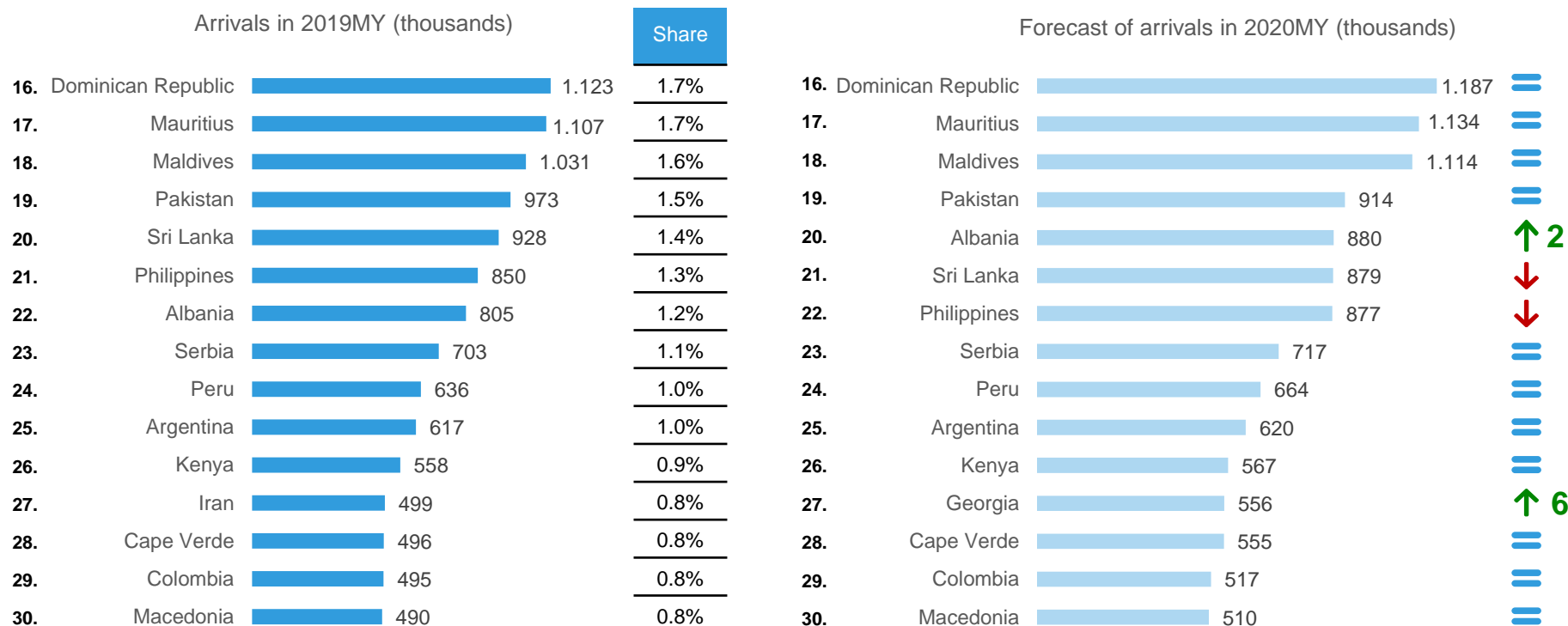
2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.

ODA recipients: top 30 destinations for European travellers (II)

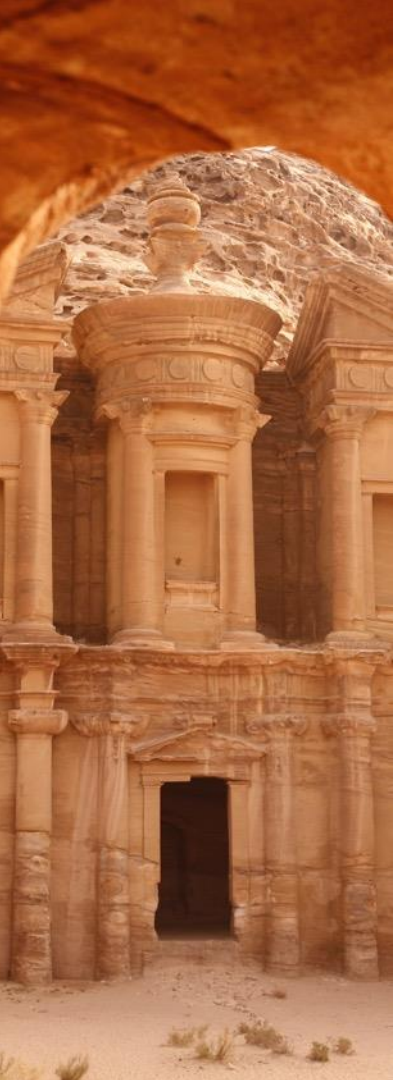
Top 16 to Top 30 destinations by European air arrivals



2019MY: Arrivals from 1st May 2018 to 31st April 2019; 2020MY: forecast for arrivals from 1st May 2019 to 31st April 2020.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.



Key factors to lead travel growth

1. Traveller safety.
2. Boost connectivity.
3. Promote travel facilitation.



Q & A

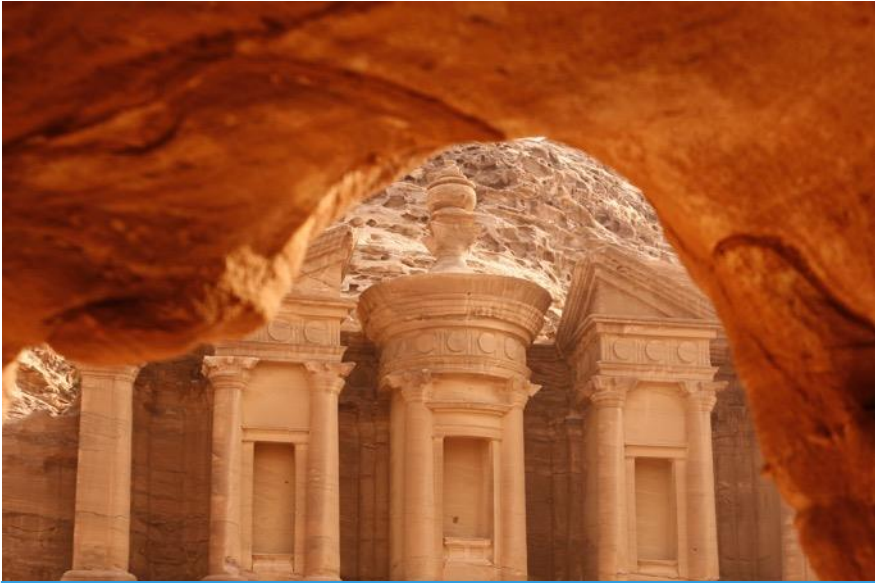


THANK YOU



Check out the latest fresh analysis at www.forwardkeys.com





Annex

Glossary and Perimeter





DESTINATION

Developing countries as per DAC list of ODA recipients, including 146 countries. Focus on top 10 destinations by volume in CBI countries of interest list, which comprises 24 ODA-recipient destinations: Morocco, Egypt, Tunisia, Algeria, Kenya, Lebanon, Senegal, Jordan, Nigeria and Ghana.



MARKET

EU-28: Denmark, Finland, Ireland, Sweden, United Kingdom, Austria, Belgium, France, Germany, Luxembourg, Netherlands, Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Croatia, Cyprus, Greece, Italy, Malta, Portugal, Slovenia and Spain. **EFTA:** Iceland, Liechtenstein, Norway and Switzerland. EU-28 & EFTA are referred to as "Europe".



PERIOD & PERIMETERS

Arrivals history: from May 2014 to April 2019.

Forecast: from May 2019 to April 2020.

Length of stay: only considered travellers with return trips and overnight stay at the destination(s).



FREQUENTLY USED TERMS

ARRIVALS: refers to the number of airline passengers arriving at the destination within a specific time frame.

FORECAST: refers to the estimated number of airline passengers arriving at the destination within a specific future time frame.

BUSINESS TRAVELLERS: are defined as 1) pax who made their reservations via corporate travel agencies, 2) pax staying only during workweek days in short haul travel and 3) solo travellers staying up to 8 nights in long-haul travel.

LONG STAYS: are defined as pax staying 22 or more nights at one destination included in their travel itinerary.

LEISURE TRAVELLERS: are pax who don't qualify as Business or Long stays.

VISITORS: pax staying at the destination.

DIRECT BOOKINGS: refers to air bookings sold without the intermediation of a travel agency.

ONLINE TA: travel agencies that operate almost exclusively online.

CORPORATE TA: travel agencies primarily dedicated to corporate travel.

RETAIL TA AND OTHER TRADITIONAL TA: travel agencies that operate in traditional ways (ie. Shops or over the phone)



CBI PRIORITY COUNTRY LIST

Morocco, Egypt, Tunisia, Algeria, Kenya, Lebanon, Senegal, Jordan, Nigeria, Ghana, Ethiopia, Ivory Coast, Mali, Uganda, Rwanda, Burkina Faso, Guinea, Sierra Leone, Mauritania, Niger, Chad, Liberia, Libya, Palestine*.



DAC LIST OF ODA RECIPIENTS

Least Developed countries:

Afghanistan, Angola, Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Congo (The Republic of), Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Haiti, Kiribati, Lao PDR, Lesotho, Liberia, Malawi, Madagascar, Mali, Mauritania, Mozambique, Myanmar, Nepal, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, South Sudan, Sudan, Tanzania, East Timor, Uganda, Vanuatu, Yemen, Zambia, Togo, Tuvalu, Niger, Rwanda, North Korea, Kenya, Tajikistan, Zimbabwe.

Lower Middle Income countries:

Armenia, Bolivia, Cape Verde, Cameroon, Congo, El Salvador, Georgia, Guatemala, Guyana, Honduras, India, Indonesia, Kosovo, Kyrgyzstan, Micronesia, Moldova, Mongolia, Nicaragua, Pakistan, Papua New Guinea, Paraguay, Philippines, Samoa, Sri Lanka, Swaziland, Syria, Tokelau*, Ukraine (excl. Simferopol), Uzbekistan, Vietnam, Palestine*.

Upper Middle Income countries:

Albania, Antigua and Barbuda, Argentina, Azerbaijan, Belarus, Belize, Bosnia and Herzegovina, Botswana, Brazil, Chile, China, Colombia, Cook Islands, Costa Rica, Cuba, Dominica, Dominican Republic, Ecuador, Fiji, Macedonia, Gabon, Grenada, Iran, Marshall Islands, Nauru, Panama, Peru, Saint Helena, Saint Lucia, Saint Vincent and the Grenadines, Serbia, Seychelles, South Africa, Turkmenistan, Uruguay, Venezuela, Wallis and Futuna Islands, Mauritius, Mexico, Montenegro, Montserrat*, Namibia, Niue, Palau, Suriname, Thailand, Tonga, Turkey, Iraq, Jamaica, Kazakhstan, Malaysia, Maldives.

* Data not available