World Tourism Organization

UNWTO

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Visa Openness
Report 2015

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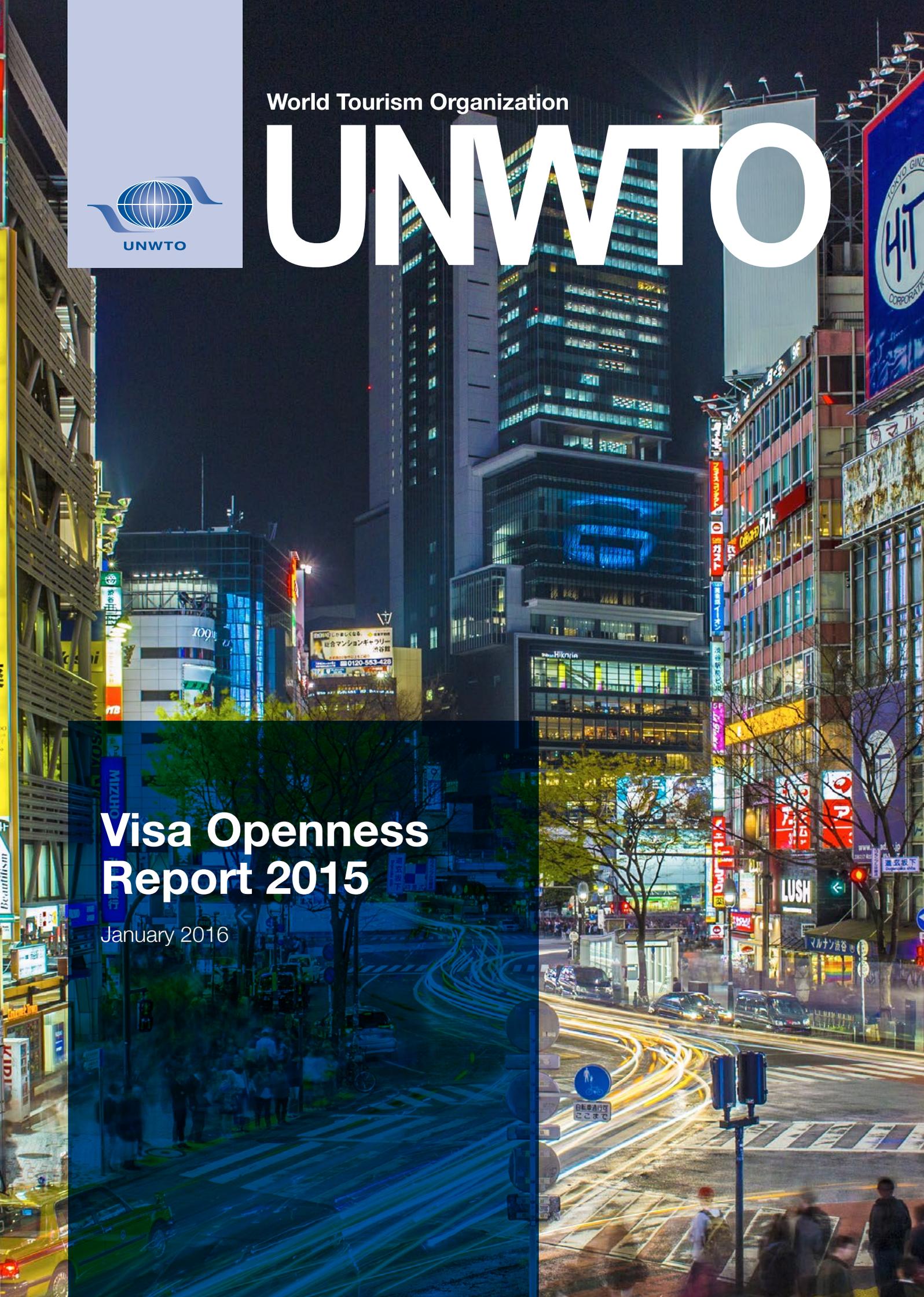
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Visa Openness Report 2015

Table of Contents

Executive Summary

Tourism visas around the world: 2015 snapshot

- The visa openness report 2015 annual report prepared by UNWTO continues the analysis of visa policies and the progress made in visa facilitation over the past seven years, supporting destinations with evidence-based policy making and helping to prioritize activities within their facilitation policies.

- Despite of continuous challenges, the world's openness continues to grow and it is at its highest level ever.

- In 2015, destinations around the world still require on average approximately two thirds of the world's population to obtain a traditional visa prior to departure. Some 18% of the world's population is able to enter a destination without a visa, while another 15% can receive a visa on arrival and 6% is able to obtain eVisas.

- Globally there is a big variety in visa policies, from countries allowing almost any citizen to enter freely to countries requesting visas indiscriminately.

- Overall, emerging economies continue to be more open than advanced ones.

- South-East Asian, East African, Caribbean and Oceanian destinations remain the most open subregions while Central African, North African and North American destinations remain the most restrictive subregions.

Progress in visa facilitation

- Notable progress has been made in the area of visa facilitation in recent years.

- While at the beginning of 2008, destinations requested an average of 77% of the world's population to apply for a traditional visa prior to departure, this percentage decreased to 61% in 2015.

- In total, improvements of visa requirements were made in 7421 destination-source market country pairs between 2010 and 2015.

- A total of 54 destinations significantly facilitated the visa process for citizens of 30 or more countries between 2010 and 2015, by changing their visa policies from "traditional visa" to either "eVisa", "visa on arrival" or "no visa required".

- Destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes. Out of the 7421 total improvements between 2010 and 2015, 6357 were done by those countries that significantly changed their visa policies.

- The analysis of different facilitation measures showed that between 2010 and 2014, the most common visa policy change implemented was from traditional visa to visa on arrival. However, between 2014 and 2015, data indicates that the majority of positive changes introduced during that period were from traditional visa to eVisa.

- The benefits of visa facilitation taking place within economic and regional blocs continue not to be limited to members only but also affect the relationship with non-members in a positive way.

- In 2015, the determined action taken by governments continues to be the reason for the remarkable and substantial improvements to facilitation around the world.

Methodological note

- The World Tourism Organization (UNWTO) has monitored the development of visa policies since 1963. Data has been collected on an annual basis since 2008 and is validated through surveys and communication with Member States.

- 2015 data was collected between January and May 2015. The process included a full review of official destinations´ websites between January and April 2015, the verification of information against secondary public resources, and a detailed formal consultation process on the findings with all national (tourism) authorities in May of 2015.

- 1980 data was collected from UNWTO archival data on travel abroad frontier formalities originally collected from Member States in 1980.

1.
Introduction

The dimensions of international tourism

Over the past six decades, tourism has continued to expand and diversify; it is now one of the largest and fastest-growing economic sectors in the world. Many new tourist destinations have emerged alongside the traditional ones of Europe and North America. From 1980 to 2014, international tourist arrivals (i.e., overnight visitors) grew four-fold from 279 million in 1980 to 1,132 million in 2014, corresponding to an average growth of 4.2% a year.

In the same period, the export value of tourism – that is, international tourism receipts, including international passenger transport – increased from US$ 125 billion in 1980 to US$ 1.5 trillion in 2014, representing the same annual average growth as that of international tourist arrivals.

According to the World Tourism Organization (UNWTO) long-term forecast Tourism Towards 2030, international tourist arrivals are expected to continue to grow at the sustained pace of 3.3% a year on average, reaching 1.8 billion by 2030.[1]

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4% a year) of advanced economy destinations (2.2% a year). As a result, arrivals in emerging economies are expected to surpass those in advanced economies and 57% of international tourist arrivals will occur in emerging-economy destinations (versus 30% in 1980 and 47% in 2010). Arrivals in advanced-economy destinations will make up 43% of arrivals overall (versus 70% in 1980 and 53% in 2010).

In order to fully reap the socio-economic benefits international tourism can generate for a country, it is necessary to put in place conditions that make the country competitive, the most important of which is to make destinations easy to visit.

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1. World Tourism Organization (2011), *Tourism Towards 2030: Global Overview,* UNWTO, Madrid.

2.
The functions of visas

Visa policies are among the most important governmental formalities influencing international tourism. The development of policies and procedures for visas, as well as for other important travel documents such as passports, is closely linked to the development of tourism. With the swift growth of international tourism in the last six decades, the quality, reliability, and functionality of visas and other travel documents has evolved. Only half a century ago, travel was heavily impacted by customs regulations, currency exchange limitations and visa formalities.

A great deal of progress has been made in facilitation, which has contributed to the remarkable growth of the tourism sector. Especially noteworthy are the multilateral agreements that mutually exempt all or certain categories of travellers from the visa requirement. However, despite the progress made, namely in recent years, current visa policies are still often inadequate and inefficient, and are thus acknowledged to be an obstacle to tourism growth.

Visas perform several functions. They serve to ensure security; to control immigration and limit the entry, duration of stay, or activities of travellers; to generate revenue and apply measures of reciprocity; and to ensure a destination's carrying capacity is not exceeded and control tourism demand. Although 'security' is commonly stated to be the most important reason to impose a visa requirement, in practice, all the functions noted here can be observed, and form a reason to introduce or maintain a visa.

Travellers mainly see visas as a formality that imposes a cost. If the cost of obtaining a visa – either the direct monetary cost imposed in the form of fees or the indirect costs, which can include distance, time spent waiting in lines, and the complexity of the process – exceeds a threshold, potential travellers are simply deterred from making a particular journey or choose an alternative destination with less hassle. This finding is not new. It is interesting in this context to note that, in 1963, the delegates of 87 States agreed, at the United Nations Conference on International Travel and Tourism in Rome, that "Governments should extend to the maximum number of countries the practice of abolishing, through bilateral agreements or by unilateral decision, the requirement of entry visas for temporary visitors".[2]

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2. United Nations Conference on International Travel and Tourism (1964), *Recommendations on International Travel and Tourism,* August 21–September 5, 1963. Rome.
   States represented at the conference were: Afghanistan, Algeria, Argentina, Australia, Austria, Belgium, Bolivia, Brazil, Bulgaria, Byelorussian Soviet Socialist Republic, Cambodia, Cameroon, Canada, Ceylon, Chad, Chile, China, Colombia, Congo (Leopold-Ville), Costa Rica, Cuba, Cyprus, Czechoslovakia, Denmark, Dominican Republic, El Salvador, Federal Republic of Germany, Finland, France, Greece, Guatemala, Holy See, Hungary, India, Indonesia, Iran, Iraq, Ireland, Israel, Italy, Japan, Jordan, Kuwait, Lebanon, Liberia, Libya, Luxembourg, Madagascar, Mali, Mexico, Morocco, Nepal, Netherlands, New Zealand, Niger, Nigeria, Norway, Pakistan, Paraguay, Peru, Philippines, Poland, Portugal, Republic of Korea, Romania, San Marino, Saudi Arabia, Senegal, Somalia, Republic of South Africa, Spain, Sudan, Sweden, Switzerland, Syria, Thailand, Trinidad and Tobago, Tunisia, Turkey, Uganda, Ukrainian Soviet Socialist Republic, Union of Soviet Socialist Republics, United Arab Republic, United Kingdom of Great Britain and Northern Ireland, United States of America, Venezuela and Yugoslavia. UN Specialized Agencies: FAO, UNESCO, ICAO, WHO, IMCO.

3.
Areas of opportunity

Joint research by the UNWTO and the World Travel & Tourism Council (WTTC) in 2012, demonstrated that improving visa processes could generate an additional US$ 206 billion in tourism receipts and create as many as 5.1 million jobs, in three years' time, in the G20 economies.[3,4] In addition, research in 2013 demonstrated that policy improvements across APEC economies could also generate up to US$ 89 billion in international tourism receipts and between 1.0 and 1.4 million new jobs within three years.[5]

Both analyses, as well as further work by UNWTO in this area, have shown many areas of opportunities for destinations in regard to visa facilitation. Among others, these include: 1) increasing and enhancing communication around visa policies; 2) enhancing visa application processes and entry procedures; 3) differentiating the treatment of high/medium and low-risk travellers; and 4) developing and improving product- and group- specific facilitation measures.

Increase and enhance communication around visa policies

The availability and reliability of information on entry formalities – especially on visa categories and visa requirements and procedures – that destinations provide are among the simplest but least addressed areas of opportunity. Providing clear, up-to-date and mainstreamed information on different official information sources, with information also available in multiple languages, ensures good communication with and satisfaction among potential travellers. Furthermore, creating communication channels (e.g. hotlines) that allow for feedback from stakeholders responsible for submitting visa application on behalf of travellers enables governments to identify and address common problems more effectively.

Enhance visa application processes and entry procedures

A major opportunity for destinations is the way visa requests for temporary visitors are processed, as well as the requirements linked to this processes. In order to avoid bottlenecks created by processing procedures, modern information technology facilitates processing applications for service providers and is also crucial in regard to gaining valuable time for security processes. Receiving passenger information ahead of time 'advances the border' and reduces wait-times at borders. Besides using a more effective IT-infrastructure and already existing databases, processing capacity can also be increased in peak seasons or for major events by opening visa processing centers and additional consulate services, or by increasing the number of flexible staff that can be placed in different workplaces, depending on demand. Also, segment-oriented queue management at the port of entry, such as extra established lines for families, group travellers or frequent flyers, serve as useful instruments to influence strategic relations with key segments and markets.

Differentiate the treatment of high/medium and low-risk travellers

Destinations can significantly benefit from applying a strategy of differentiation between low/medium and high-risk source markets, groups, routes and passengers. Visa-exemptions

can, for example, be extended to source markets that enjoy a very high mobility[6] in the world and to special niche groups such as trusted traveller segments for both business and leisure travellers. In addition, visas on arrival and eVisas present valuable alternatives to traditional visas for other groups such as medium-risk markets and are especially interesting for destinations without an extensive network of representations abroad.

Develop and improve product- and group-specific facilitation measures

Regional joint visa agreements strengthen the regional image and effectively promote the destinations of the regions as multi-stop destinations. There are already a number of regional agreements in place that allow travellers from a third country to move freely between member countries once admitted by one of the participating countries. Participating countries can strengthen the unified image by agreeing on the same eligible source markets and requirements. In addition, opportunities exist regarding the use of longer duration visas with multiple entry possibilities, generating repeat visitors on the one hand and allowing for efficient resource allocations and thus capacity expansion on the other hand. Also, extended time of transit visas and other destination-specific initiatives, such as facilitated measures for groups of high importance (e.g. participants and families of mega events), can lead to increased competitiveness of destinations.

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3. The T20 Ministers refers to the Tourism Ministers of the G20 economies. The G20 economies are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, the Republic of Korea, Russia, Saudi Arabia, South Africa, Spain, Turkey, the United Kingdom and the United States of America.

4. World Tourism Organization and World Travel & Tourism Council (2012), *The Impact of Visa Facilitation on Job Creation in the G20 Economies,* UNWTO and WTTC, Madrid and London.

5. World Tourism Organization and World Travel & Tourism Council (2013), *The Impact of Visa Facilitation in APEC Economies,* UNWTO and WTTC, Madrid and London.

6. Please refer to section 8 for more information on the concept of mobility.

4.
The global and regional dimensions to visas

In 2012, leaders of the G20 highlighted the role of tourism as "a vehicle for job creation, economic growth and development". Similarly, visa facilitation was recognized in the 2013 APEC Leaders' Declaration "as a way to promote tourism and facilitate business".

More recently, the Medellin statement adopted in September 2015, at the first joint UNWTO/ICAO High-Level Forum on Tourism and Air Transport for Development, which was held alongside of the 21st UNWTO General Assembly in Colombia,[7] reiterated the importance of travel facilitation for the development of the tourism sector and encouraged Member States to pursuit their efforts to implement provisions and recommendations aiming at improving travel facilitation.

Other measures taken by regional blocs and individual countries to facilitate tourism visa are also much welcomed news; yet despite these many strides, visa requirements still significantly affect international tourism. In 2015, destinations around the world requested, on average, that 61% of the world's population obtain a visa before initiating their international journey. Another 6% of the population was at least allowed to apply for an eVisa,[8] while 15% would be able to apply for a visa on arrival. Only 18% of the world's population would not require a visa at all when travelling for tourism purposes (table 1).

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7. World Tourism Organization (2015), *Medellin Statement on Tourism and Air Transport for Development* (online), available at: http://lmd.unwto.org/event/general-assembly-twenty-first-session (27-10-2015)

8. In 2012, eVisas were accounted for separately for the first time. In 2008 and 2010, no category distinctions were made between eVisas and visas on arrival.

Table 1

Subregions of destinations by percentage of world population affected by visa policies, 2015

	Openness[a]	No visa	Visa on arrival	eVisa	Visa required[b]
		% of world population affected by visa policies			
World	**32**	**18**	**15**	**6**	**61**
Advanced economies[c]	28	25	0	5	70
Emerging economies[c]	33	17	18	6	59
By UNWTO regions:					
Africa	**31**	**8**	**28**	**6**	**57**
North Africa	16	16	0	0	84
West Africa	31	6	32	7	56
Central Africa	5	1	0	7	92
East Africa	48	7	52	9	33
Southern Africa	29	29	0	0	71
Americas	**37**	**32**	**4**	**3**	**60**
North America	15	12	0	5	83
Caribbean	43	41	1	2	55
Central America	33	31	4	0	65
South America	39	29	9	6	56
Asia and the Pacific	**42**	**20**	**23**	**11**	**46**
North-East Asia	33	30	2	3	65
South-East Asia	51	22	33	11	34
Oceania	43	26	18	10	47
South Asia	37	4	33	18	44
Europe	**24**	**22**	**2**	**2**	**74**
Northern Europe	23	23	0	0	77
Western Europe	23	23	0	0	77
Central/Eastern Europe	24	18	6	3	73
Southern/Mediterranean Europe	27	25	0	3	72
- of which EU-28[d]	23	23	0	0	77
Middle East	**19**	**2**	**17**	**10**	**71**

Note: Due to rounding, aggregates do not necessarily add to 100.

Source: UNWTO based on information of national official institutions.

a Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and traditional visa weighted by 0. For the (sub)regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by natural logarithm of the population size (i.e. ln (1,000 population)) in order to take into account differences in destination size).

b Traditional visa means that a visa has to be obtained prior to departure and is not an electronic visa (eVisa).

c Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at www.imf.org/external/pubs/ft/weo/2012/01. Of the 195 destinations analyzed in 2014, 39 are classified as advanced economies and 156 as emerging economies.

d The EU-28 countries are Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxemburg, Malta, the Netherlands, Poland, Portugal, Ireland, Romania, the Slovak Republic, Slovenia, Spain, Sweden and the United Kingdom.

Figure 1

Tourism visa openness index by country, 2015

Openness index

Low openness ◄ [0-21] [22-24] [25-52] [53-100] ► High openness
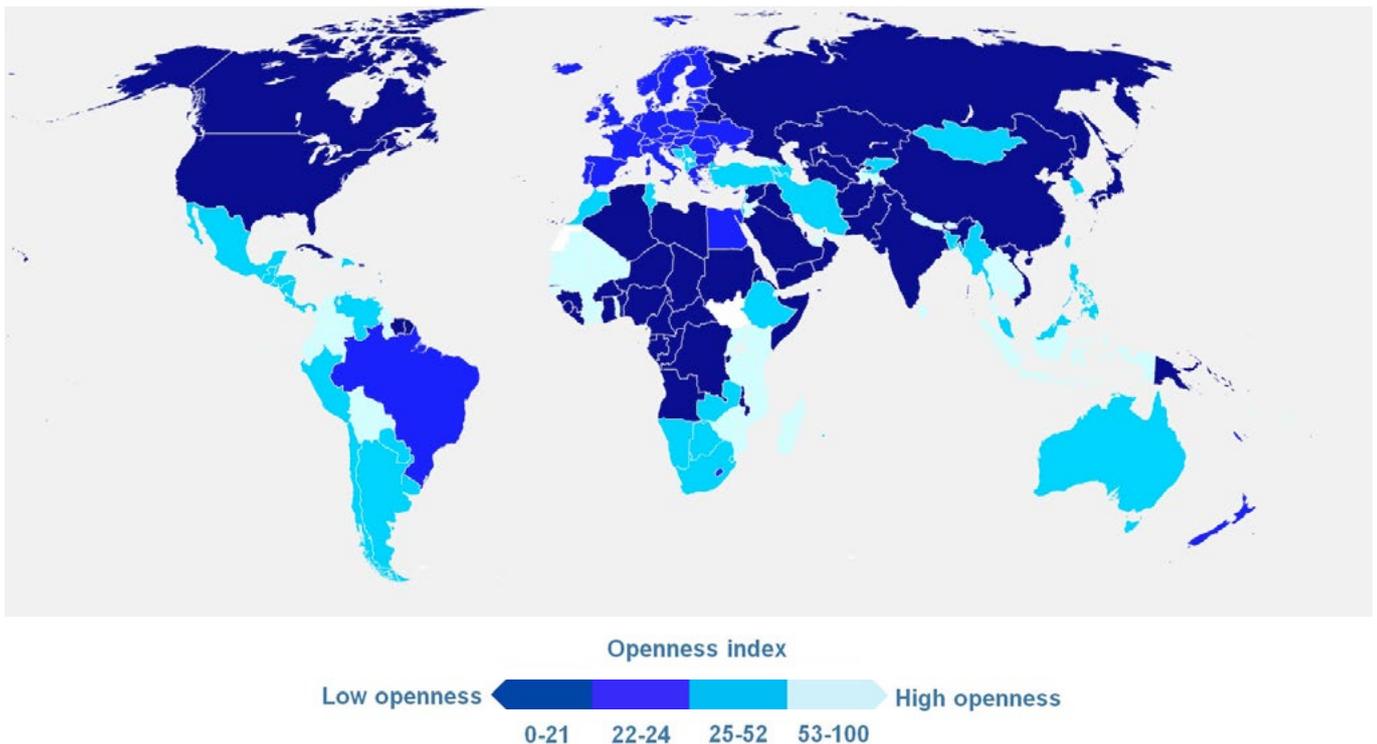
Note: The higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world's population exempt from obtaining a visa, with the percentages of no visa by 1, visa on arrival weighted by 0.7 and eVisa by 0.5 and traditional visa weighted by 0.

Key: As of 2015, a revision of categories took place to see how openness is spread out globally relative to the world's 2015 average openness. The openness index was sorted and grouped in 4 categories including an equal number of countries in each group. The lighter the colour of the country in the map, the more open it is.

Source: UNWTO based on information of national official institutions.

Disclaimer: The maps elaborated by UNWTO are for reference only and do not imply any judgement on the legal status of any territory, or any endorsement or acceptance of such boundaries.

While both emerging and advanced economies show an increase in their openness index, **emerging economies continue to be, in 2015, more open in terms of travel requirements than advanced ones** (table 1). When travelling to an emerging-economy destination, on average, 59% of the world's population needs a traditional visa while 6% requires an eVisa. In contrast, 70% of the world population needs a traditional visa, and 5% an eVisa, when visiting advanced-economy destinations. When looking more in specific in the changes to 2014, it is interesting to note that emerging economies have doubled their percentage for eVisa to 6%, surpassing the 5% share in advanced economies for that visa policy. However, behind this increase are only a few emerging economies that have introduced eVisas for many, if not all, source markets world-wide.

The example of the emerging economies implementing eVisa policies shows that modern technology is becoming more interesting for destinations as a practical technique to improve visa policies towards more source markets, often requiring limited investment in the necessary resources and infrastructure. Especially for smaller countries with limited capacities, this presents an option to handle the growing number of international tourist arrivals.

Moreover, full visa exemption remains a policy more implemented by advanced economies (25% versus 17%), whereas in emerging economies, obtaining a visa on arrival remains much more common. In 2015, 18% of the world population can travel to emerging economies with a visa on arrival while only 0.4% can travel with this type of visa to advanced economies.

From a regional perspective, destinations in Asia and the Pacific have still facilitated international travel the most. To visit Asia and the Pacific, an average of 20% of the world's population does not require a visa in 2015, another 23% could obtain a visa on arrival, and 11% could use and eVisa. In comparison, only 5% of the world's population could

travel to Asia and the Pacific with an eVisa in 2014. From all regions analyzed, this means that as from 2015, Asia and the Pacific offers an eVisa to more people around the world than any other region, surpassing the previously leading region in terms of eVisa, the Middle East. When looking at subregions, South-East Asia remains, together with East Africa, the most open subregion in the world because of the large number of visa on arrival (this is sufficient for 33% of the world's population in average) and the considerable number of visa exemptions (22%) and eVisa alternatives (11%).

When travelling to the **Americas,** 60% of the world's population is required to obtain a traditional visa prior to departure in 2015. However, this figure varies widely across the subregions of the Americas. While North America is one of the more restricted subregions, where only 12% of the world's population can enter without a visa,[9] the Caribbean continues to be one of the most open subregions in the world: 41% of the world's population can enter without a visa (in 2014, this was 38%) and 3% has the ability to obtain a visa on arrival or eVisa. Destinations in the two other subregions – Central and South America – also abolished visas for a comparatively high number of source markets (in comparison to other subregions around the world), making the Americas again the leading region in terms of visa exemptions (32% of the world's population does not need a visa to visit the Americas; see table 1).

Africa requires a traditional visa prior to departure from 57% of the world's population, but, at the same time, continues to have the highest percentage of countries whose visitors are able to obtain a visa on arrival (28%). However, this figure varies significantly across the African subregions. In Central Africa, the use of traditional visas – required for 92% of the world's population – is highest of all Africa's subregions. East Africa, in contrast, has the lowest in the world: only 33% of the world's population is required to have traditional visas. Visa on arrival is popular in East Africa (52%), making East Africa, together with South-East Asia, the two most open subregions of the world.

In the **Middle East,** 71% of the world's population is required to obtain a traditional visa prior to departure to any of its destinations in 2015, but 17% are allowed to obtain a visa on arrival and 10% can obtain an eVisa. Despite focusing mainly on allowing more travellers to visit the region with an eVisa (in 2014, this figure was 6%), the Middle East has, in 2015, the second highest percentage of the world's population able to apply for an eVisa only slightly surpassed by Asia and the Pacific. At the same time, however, the abolishment of any visa requirements in the Middle East is the lowest among all five regions, with only 2% of the world population not required to obtain a visa of any kind.

European destinations continue to be among the most restrictive destinations, requiring, on average, 76% of the world's population to obtain a visa prior to departure (traditional visa and eVisa), while 22% is not required to obtain visa and only 2% can obtain one on arrival. However, while in 2014, no one could enter Europe with an eVisa, this has changed to 2% in 2015, due to countries in Central/Eastern Europe and

Southern/Mediterranean Europe introducing such systems. Although relatively similar in terms of allowing comparable amounts of the world population enter the different European subregions with a traditional visa or no visa, efforts could also be observed by Central/Eastern Europe in facilitating through the introduction of visa on arrival (allowing 6% of the world population to make use of a visa on arrival).

In summary,

• Visa exemptions are most common in the Caribbean (41%), Central America (31%) and in North-East Asia (30%);

• Visa on arrival policies are comparatively common in East Africa (52%), South-East Asia and South Asia (both 33 %) as well as West Africa (32%);

• eVisa programmes are particularly popular in South Asia (18%), South-East Asia (11%), as well as Oceania and the Middle East (both 10%);

• Traditional visa requirements are most prevalent in Central Africa (92%) and North Africa (84%), and North America (83%), followed by the four European subregions, Southern Africa and the Middle East (all higher than 70%).

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9. Although not all eVisa programmes are technically classified as visas (for example, the Electronic System for Travel Authorization/ ESTA, in the United States is not a visa according to law), they are similar in form and function and have been therefore categorized as eVisas.

5.
Interregional and intraregional performances

Looking at interregional facilitation patterns, destinations in the Americas have facilitated travel the most for Europeans. In 2015, 80% of Europeans can travel without a traditional visa to the Americas, with 72% of this population not being required to obtain a visa at all. In contrast, only 6% of the European population can travel without a visa to the Middle East, while 37% requires a visa on arrival. Another region having facilitated entry requirements significantly is Asia and the Pacific, where 71% of Europeans do not require a traditional visa when visiting the region, while 37% do not need any entry visa at all.

Figure 2 visualizes the regional population affected by regional visa policies in 2015. The five regions of origin are connected with five regions of destination through coloured striped lines, where each of these lines represents a type of visa policy. The width of the striped lines between two regions shows the population affected from a regional source-market travelling to a regional tourist destination. The wider the line, the more population affected.

Figure 2

Population affected by interregional and intraregional visa facilitation, 2015


Region of origin — Destination — Visa policies

Legend:
- Traditional visa
- Visa on arrival
- No visa required
- eVisa
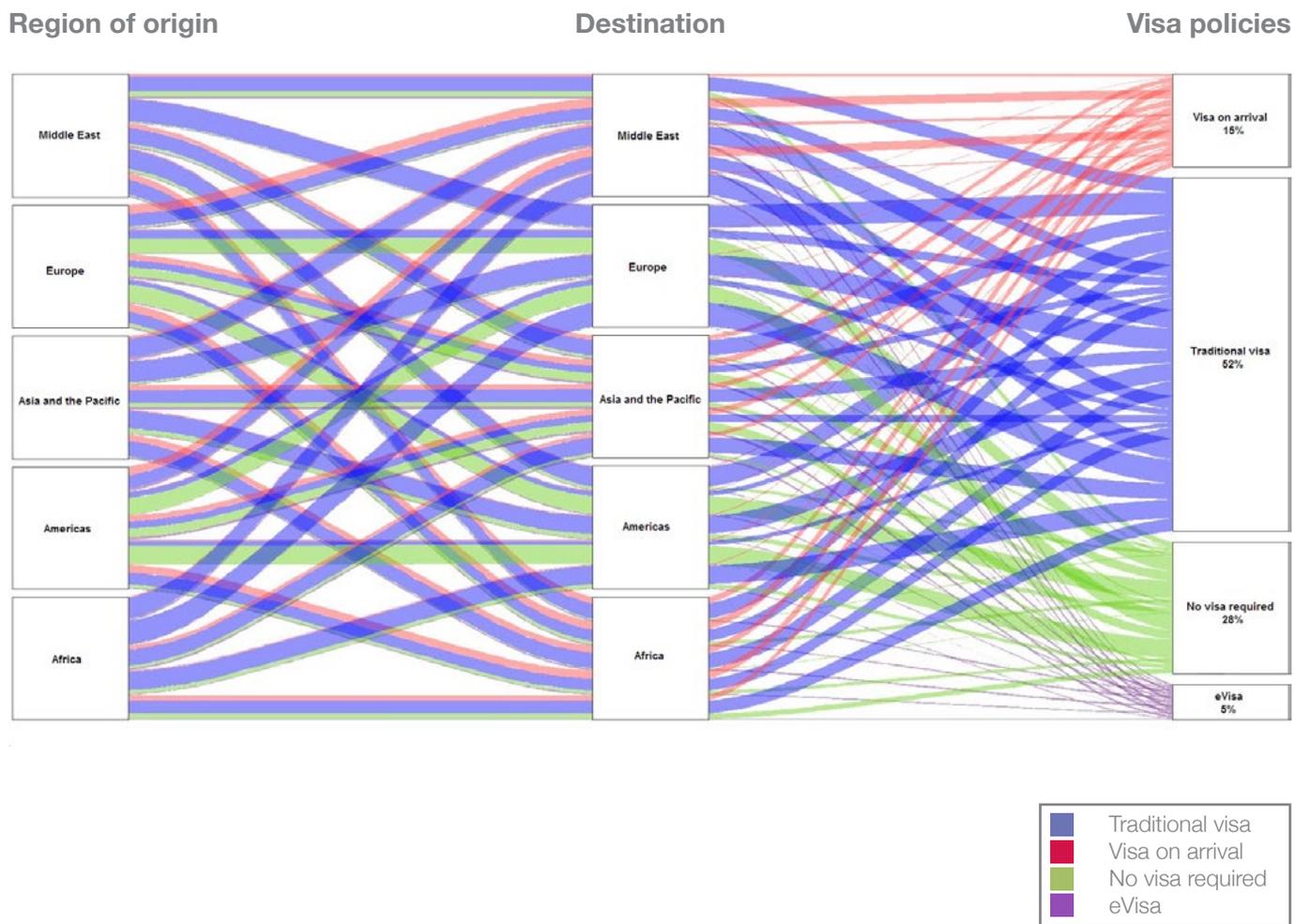
Regarding inter-subregional travels, destinations in **Northern and Western Europe have facilitated travel the most for North American and Central American citizens in 2015,** with visa exemptions being the most common policy. At the same time, almost all Northern and Western European citizens can enter Central and South American destinations without any type of visa. While this only describes the general visa policies introduced by subregions for the population of other subregions, a more detailed analysis of reciprocal actions will take place in the following chapters.

Southern African destinations have also facilitated travel for citizens from Northern and Western European citizens. Subsequently, the citizens from these two subregions do not require visa when travelling to Southern Africa in 2015. In addition, Oceania (Asia and the Pacific) has facilitated travel for citizens of almost all the other subregions.

When looking at intraregional travel, destinations within **the Americas have facilitated entry requirements the most,** with 82% of the region's population being able to travel without a traditional visa and 77% without any type of visa. In Europe, 65% of its population can travel intraregionally without a traditional visa, while in Asia and the Pacific, as well as in Africa, 47% of the region's population can travel without a traditional visa. While visa exemption is more common within Europe (62%) due to the Schengen Area, offering visa on arrival as facilitation mechanism for the population of the own region is more frequent in Africa and Asia and the Pacific (23% and 20% respectively). Finally, 42% of the population of the Middle East is not required to obtain a traditional visa, with 23% of them travelling within the region without any visa.

Subregions that allow high proportions of their citizens to travel within the subregion without a traditional visa are: West Africa, Southern Africa, Oceania, Northern Europe and Western Europe.

Table 2

	Least restrictive destinations, 2015	
	Name of destination	Openness[a]
1	Cook Islands	100
	Micronesia, Federated States of	100
	Niue	100
	Dominica	100
5	Haiti	99
6	Macao (China)	85
7	Hong Kong (China)	80
	Mauritius	80
9	Turks and Caicos Islands	79
	Vanuatu	79
11	Fiji	78
12	Montserrat	76
	Saint Vincent and the Grenadines	76
	Guyana	76
15	Saint Kitts and Nevis	75
16	Cambodia	72
17	Guinea-Bissau	71
	Togo	71
	Palau	71
	Nepal	71

Source: UNWTO based on information of national official institutions.

a: Scores range from 0 to 100; the higher the score, the better. Destinations with the same score are tied, and so have the same rank; these appear in alphabetical order in the table. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa, with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and traditional visa weighted by 0.

6.
Reciprocity

In 2015, 51% of all visa policies are reciprocal, with 17% of these policies being mutually open (same as in 2014) and 31% being mutually closed (2% points lower than in 2014). Furthermore, in 2% of the pairs, both countries have visa on arrival, while in less than 1% of policy pairs, both countries have an eVisa. The remaining 49% are non-reciprocal combinations.[10]

Between 2008 and 2015, the proportion of reciprocally open policies, i.e. both countries do not require each other's citizens to obtain a visa, has increased from 14% of all pairs to 17%.

In the same period, reciprocally closed policies, i.e. both countries do require each other's citizens to obtain a visa, have considerably decreased from 57% to 31%. Countries have continuously and unilaterally opened by introducing no visa required, visa on arrival or eVisa, increasing from 48% to 49% between 2014 and 2015, thereby confirming the upward trend observed since 2008.

Table 3

World visa policy reciprocity	2008	2010	2012	2013	2014	2015	2015 / 2008 Change (% pts.)
% Reciprocal	71	68	54	54	52	51	-20
% no visa	14	16	16	16	17	17	3
% traditional visa	57	52	35	36	33	31	-26
% visa on arrival or eVisa	0	0	3	2	3	3	3
% Not reciprocal	29	32	46	46	48	49	20

Through analyzing countries´ openness to one another, while taking also into account the stage of economic development, the following observations can be made for 2015:

Advanced economies continue to have among each other a high level of reciprocal openness with 89% of policy pairs being reciprocally open. Only in 11% of the pairs, no visa is required by one country, while a traditional visa, eVisa, or visa on arrival is required by the other.

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10. For this analysis of reciprocity, data has been used on 37,830 country pairs in total (195*195-195) for the years: 2008, 2010, 2012, 2013, 2014 and 2015. As each pair is combined with its reciprocal (for instance China-France with France-China) there is consequently only half the number of reciprocal pairs (i.e. 18,915).

When looking at the relationships between emerging countries, it can be observed that 50% of all policy pairs are reciprocal and 50% are non-reciprocal (in 2014, 52% of all pairs were reciprocal and 48% were non-reciprocal). Mutually closed policies still dominate reciprocal relationships between emerging economies, with 36% of policies pairs being mutually closed. On the other hand, 10% of the reciprocal policies continue to be open and in 4% both countries issue a visa on arrival. Of the asymmetric policies, most common is a visa on arrival on one end and a traditional visa on the other (24%). A unilateral exemption on one end and traditional visa on the other can be observed in 11% of the pairs.

By examining the relationships between emerging and advanced economies, 21% of country pairs policies are reciprocally open and 25% a traditional visa is required on both ends. In 23% of the pairs, emerging economies issue a visa on arrival, while advanced economies require traditional visa. In 19% of the pairs, the emerging economy has unilaterally exempted the need for a visa, while the advanced economy requires a traditional visa.

Table 4

Visa facilitation reciprocity for travel within and between the groups of advanced and emerging economies, 2015

		Total		Advanced economies		Emerging economies		Emerging and advanced economies		
Total		18915	100 (%)	741	100 (%)	12090	100 (%)	6084	100 (%)	
Reciprocal		9560	51	663	89	6033	50	2864	47	
No visa	No visa	3209	17	662	89	1256	10	1291	21	
Visa on arrival	Visa on arrival	457	2	0	0	434	4	23	0	
eVisa	eVisa	54	0	1	0	42	0	11	0	
Visa	Visa	5840	31	0	0	4301	36	1539	25	
Not reciprocal		9355	49	78	11	6057	50	3220	53	
No visa	Visa	2489	13	7	1	1332	11	1150	19	Emerging / Advanced
Visa on arrival	Visa	4295	23	0	0	2903	24	1392	23	
eVisa	Visa	1111	6	0	0	869	7	242	4	
No visa	eVisa	256	1	68	9	119	1	68	1	
Visa on arrival	eVisa	329	2	0	0	280	2	49	1	
No visa	Visa on arrival	567	3	3	0	554	5	10	0	
No visa	Visa	52	0	-	-	-	-	52	1	Advanced / Emerging
Visa on arrival	Visa	69	0	-	-	-	-	69	1	
eVisa	Visa	47	0	-	-	-	-	47	1	
No visa	eVisa	11	0	-	-	-	-	11	0	
Visa on arrival	eVisa	9	0	-	-	-	-	9	0	
No visa	Visa on arrival	121	1	-	-	-	-	121	2	

Note: Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at www.imf.org/external/pubs/ft/weo/2012/01. Of the 195 destinations analyzed in 2015, 39 are classified as advanced economies and 156 as emerging economies. Due to rounding, aggregates do not necessarily add up to 100.

Source: UNWTO based on information of national official institutions. World Tourism Organization (UNWTO) ©

7.
Progress in recent years

With the aim of examining visa regulations in greater detail, UNWTO has coded and analysed data from 1980 for the first time in 2014. Destinations around the world requested in 1980, on average, that 75% of the world's population obtain a visa before initiating an international journey (figure 3). Another 5% of the population was able to apply for a visa on arrival, while 20% of the world's population was not required to obtain a visa at all when travelling for tourism purposes.

The similar high percentage of traditional visa between 2008 and 1980 highlights the unprecedented tendency to visa facilitation that began in 2008. While in 2008, destinations around the world required, on average, 77% of the world's population to obtain a traditional visa before travelling, this percentage decreased to 61% in 2015 (figure 4).

Figure 3

World population affected by visa policies, 1980

- Traditional visa: 75%
- Visa on arrival : 5%
- No visa required : 20%

Figure 4

World population affected by visa policies, 2015

- Traditional visa: 61%
- Visa on arrival : 15%
- No visa required : 18%
- eVisa: 6%
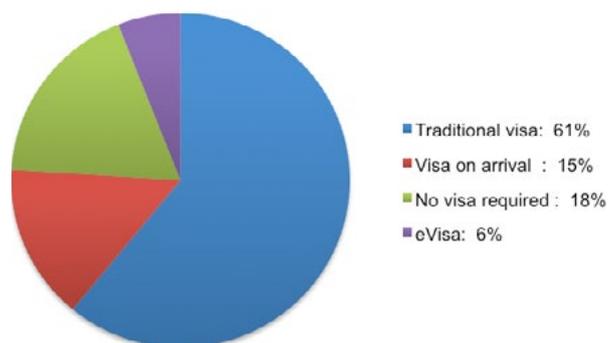
The reason for this remarkable and substantial improvement to facilitation between 2010 and 2015 is the determined action taken by governments. Destinations continued to ease the visit of citizens of another country, facilitating, in total, **7421 destination-source market pairs between 2010 and 2015** (table 5).

Overall, 54 destinations significantly facilitated travel for citizens of 30 or more countries by changing their visa policies from visa required to eVisa, visa on arrival, or no visa required. These 54 destinations took a total of 6357 individual measures, presenting 86% of all improvements made between 2010 and 2015. This demonstrates that destinations, when reviewing their visa policies, tend to thoroughly review and introduce changes.

Figure 5

World population affected by different types of visa policies, 1980-2015 (%)
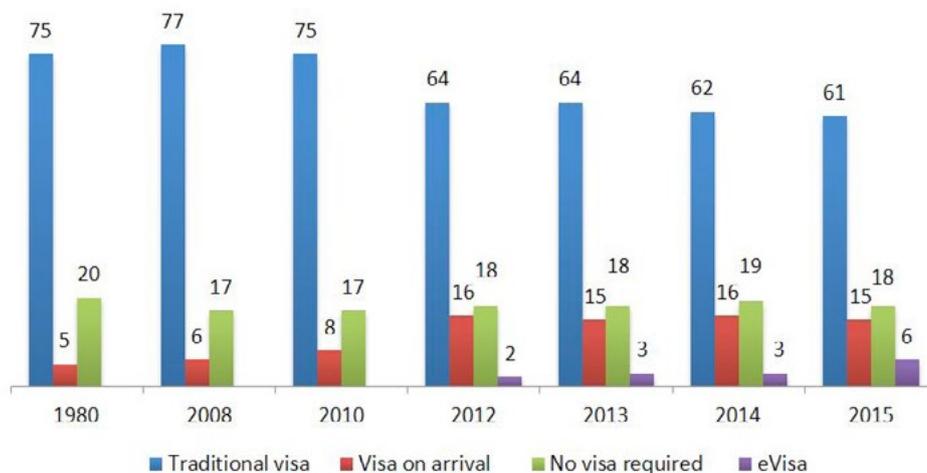
Note: Before 2012 no differentiation was made between eVisa and visa on arrival, hence both categories were grouped under visa on arrival.
Source: UNWTO based on information of national official institutions.

When looking more in detail into different facilitation measures, the most common shift was from traditional visa to visa on arrival between 2010 and 2015 (62% of all changes within that timeframe). Meanwhile, shifting from traditional visa to eVisa, as well as from traditional visa to no visa represented 29% and 16% of all positive changes, respectively.

However, when analyzing figures year by year, data shows that the shift from traditional visas to visas on arrival happened largely between 2010 and 2012 while the shift from traditional visa to no visa has continued at a similar degree between 2013 and 2015. Likewise, positive changes from traditional visa to eVisa were more pronounced over the last two years, with 91% of them being introduced between 2014 and 2015.

Looking at the advances in the different regions between 2010 and 2015, most facilitation measurements took place in Africa and Asia and Pacific, with 40% and 29% respectively. Particularly, East and West Africa made important changes by replacing traditional visa with visa on arrival. In South Asia, policy improvement has been driven by replacing traditional visa with electronic visa .

Table 5

Destinations which improved visa procedures for 30 or more countries of origin (2015 over 2010)

	Destination	Number of improvements
1	Niue	195
2	Micronesia, Federated States of	194
3	Palau	194
4	Djibouti	193
5	Bhutan	191
6	São Tomé e Principe	190
7	Mozambique	189
8	Haiti	186
9	Guinea-Bissau	180
10	Togo	179
11	Cape Verde	178
12	Rwanda	178
13	Iran	175
14	United Arab Emirates	173
15	Côte d'Ivoire	171
16	Mali	170
17	Mauritania	169
18	Uganda	161
19	Guyana	153
20	Australia	153
21	Bangladesh	149
22	Lao (P.D.R)	144
23	Kenya	138
24	United Republic of Tanzania	128
25	Ecuador	126
26	Armenia	123
27	Bolivia	122
28	Macao (China)	120
29	Zimbabwe	117
30	Georgia	112
31	Colombia	106
32	Sri Lanka	106
33	Senegal	103
34	Montserrat	91
35	Saint Kitts and Nevis	90
36	Myanmar	87
37	Tajikistan	79
38	Nicaragua	77
39	Mauritius	73
40	Bonaire	64
41	Mongolia	55
42	Kyrgyzstan	53
43	Burkina Faso	51
44	Cayman Islands	51
45	Panama	51
46	French Polynesia	49
47	Saint Lucia	46
48	Nauru	45
49	Bahrain	44
50	India	41
51	Gambia	38
52	Ethiopia	37
53	Suriname	35
54	New Caledonia	34
Subtotal		**6357**
Other destinations		1064
Total positive changes made between 2010 and 2014		**7421**

Note: An improvement is the facilitation of a visa formality by either simply abolishing the traditional paper visa or allowing an eVisa or visa on arrival. Each destination–country of origin pair is calculated.

Source: UNWTO based on information from national official institutions.

The described changes in visa policies led to an overall increase of the world's average openness over the past few years. Focusing on the past tendencies in visa facilitation as well as differences between advanced and emerging economies, it can be observed that **between 1980 and 2015, the general openness of advanced economies decreased while the general openness of emerging economies increased.**

While in 1980, 33% of the world's population was able to travel to **advanced economies** without obtaining any kind of visa, this number decreased to 25% in 2015. However, since 2008 there is again a trend of increased openness among advanced economies, though comparatively slower than among emerging economies. Especially other forms of visas, namely eVisa, have been introduced by advanced economies, resulting in a decrease of traditional visas being required from the world population (76% in 2008 to 70% in 2015).

Emerging economies, on the other hand, increased their openness since 1980 to 33, which is above the world average of 32. Drivers of this openness increase were the replacements of traditional visa requirements, which decreased from affecting 77% of the world population in 2008 to 59% in 2015.[11]

Table 6

Global trends in openness[a]	1980	2008	2010	2012	2013	2014	2015
World	22	20	22	31	30	31	32
Advanced economies	35	24	24	26	26	27	28
Emerging economies	19	19	21	32	31	32	33

a. Scores range from 0 to 100; the higher the score, the better. Destinations with the same score are tied, and so have the same rank; these appear in alphabetical order in the table. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa, with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and traditional visa weighted by 0.

Figure 6

Global trends in visa policy openness, 1980 - 2015
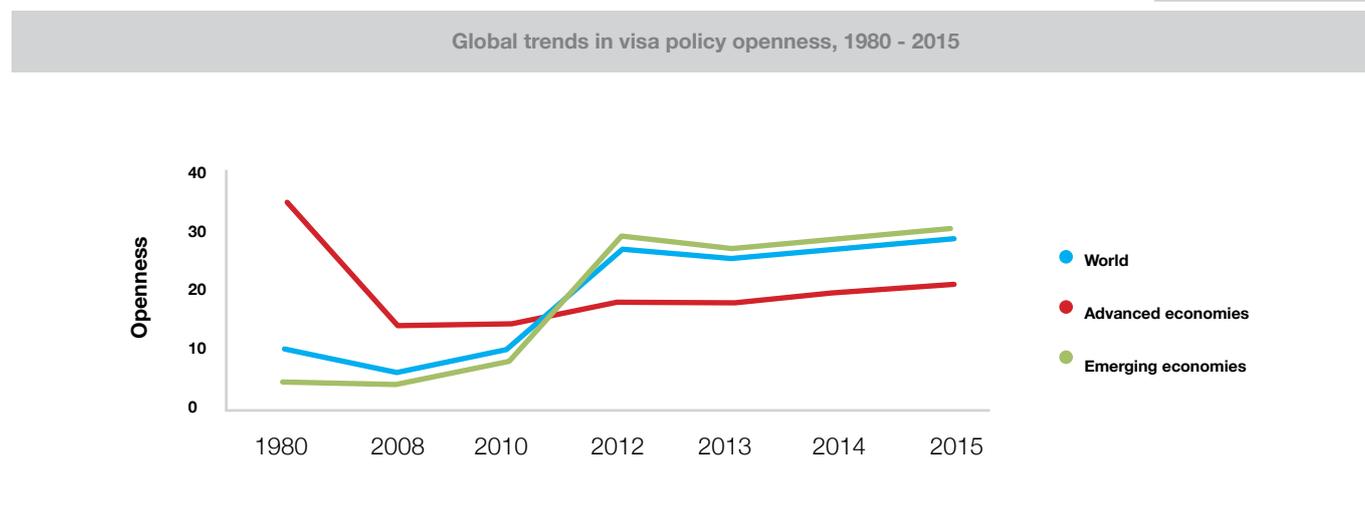
11. The overall openness of emerging economies (indicated by the openness index that accounts for all visa policy types) remained unchanged from 1980 to 2008 at 19.

8.
Outbound potential and visas

Population around the world are affected by visa policies differently. While some countries' citizens enjoy enormous advantages as they are rarely requested to obtain a traditional visa or a visa on arrival, others are constantly faced with the challenge of obtaining traditional visas before departing from their own country. However, data show that the overall global mobility of citizens has substantially increased over the 2008-2015 period, impacting citizens of all countries without exception.

The following table lists those countries whose citizens have experienced the highest level of mobility in 2015.[12]

When comparing data between 2015 and 2008 for some of the fast growing outbound markets, such as China, India and the Russian Federation, it becomes clear that destinations continue to make special efforts to facilitate visa formalities for tourists originating from these economies.

The trend of facilitating procedures for fast growing markets can also be seen when looking at all 195 source markets in more detail. In 2015, 48 source markets are highly mobile markets, meaning that these countries' citizens enjoy the highest freedom to travel, being able to enter at least half of the world's destinations without any visa. While the average mobility score for this group is 154 in 2015, it was 126 in 2008.

Interestingly, it can be seen that from the top 15 destinations in the world with the highest proportions of international tourist arrivals (15 million and up), 73% have exempted visa requirements entirely for the majority of the 48 highly mobile source markets, indicating that destinations competing for a high share of outbound markets use visa facilitation as a strategic mean to increase competitiveness.

Table 7

Top 30 countries whose citizens are affected the least by visa restrictions, 2015

	Most mobile citizens	Mobility
1	Denmark	160
	Finland	160
	Germany	160
	Italy	160
	Luxembourg	160
	Singapore	160
	United Kingdom	160
8	France	159
	Japan	159
	Korea (Republic of)	159
	Netherlands	159
	Sweden	159
	United States of America	159
14	Belgium	158
	Canada	158
	Ireland	158
	Norway	158
	Portugal	158
	Spain	158
	Switzerland	158
21	Austria	157
	Greece	157
	Malta	157
24	Czech Republic	156
	New Zealand	156
26	Hungary	155
	Iceland	155
	Malaysia	155
29	Australia	154
	Slovakia	154

Source: Data compiled by the UNWTO, based on information from national official institutions

Table 8

Mobility score: example of fast growing outbound markets, 2008-2015

Mobility score	2008	2010	2012	2013	2014	2015	Change 2015/2008 (%)
World average	**60**	**65**	**85**	**83**	**87**	**89**	**48**
Advanced economies	123	127	149	148	152	154	25
Emerging economies	44	50	69	67	71	73	65
Russian Federation	39	53	80	82	87	93	139
India	32	34	51	49	50	50	56
China	21	22	43	40	46	46	121

12. Mobility indicates to what extent citizens around the world are affected by visa policies. It is a measure ranging from 0 to 215. The higher the score, the more mobile the citizens of that country are. It is calculated by summing travel visa policies required of each country's citizens with weights of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and traditional visa weighted by 0.

9.
Focus on regional and economic blocs

When analyzing regional and economic blocs, in general, higher levels of reciprocal visa exemptions between the members of these economic blocs than the world average can be observed. Very high levels of open reciprocity continue to exist, for example, between the members of the Schengen Area (100% open reciprocity among the members), ECOWAS (93%), ASEAN (89%) as well as OECD (83%). Members of the G20 have, with 64% of policy pairs being reciprocally open, a high level of open reciprocity, which is nearly four times higher than the world average of 17%.

From all regional and economic blocs analyzed between 2014 and 2015, movements in both directions could be observed, with an increase and decrease of open reciprocity among members. While ECOWAS and PAFTA decreased their open reciprocity among members slightly, four blocs have increased their open reciprocity among members since 2014, with CAFTA-DR recording the highest change (29% in 2014 versus 43% in 2015). In ASEAN economies, open reciprocity grew by 5 percentage points compared to one percentage point in both blocs APEC and NAFTA. This demonstrates the

Open reciprocity among members of selected economic blocs, 2015 (%)

|	%
World average	17
Schengen Area	100
ECOWAS	93
ASEAN	89
OECD	83
G20	64
OSCE	61
SADC	44
CAFTA-DR	43
APEC	42
NAFTA	33
PAFTA	18
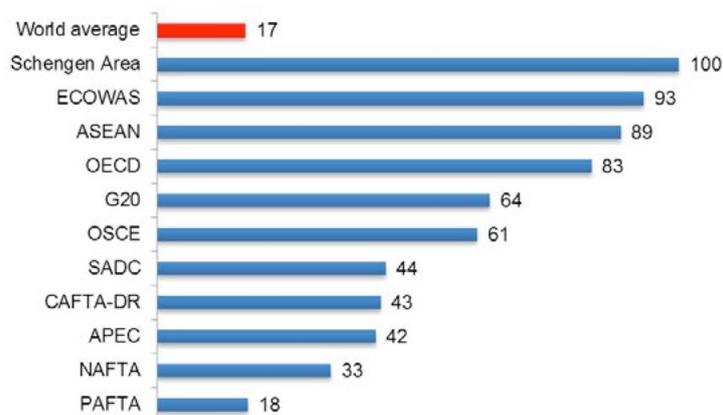
fact that various economic blocs continue to push forward regional integration through policy changes, facilitating the free movement of people within their blocs.

Looking at facilitation measures of economic and regional blocs in detail, similar trends can be observed in differences between advanced and emerging economics across economic blocs. In the case of G20 economies, for example, although open reciprocity among members remained generally the same with 64% in 2015, the percentage of reciprocally open visa policies between emerging G20 member economies increased from 32% to 38% between 2008 and 2015. In contrast, this percentage decreased slightly for advanced G20 economies from 90% to 85%. This observation can also be made within APEC, for example, where emerging economies increased their open reciprocity from 35% to 45%, while advanced economies decreased their mutually open visa policies from 61% to 58%.

Developments in reciprocity among advanced and emerging economies within selected regional and economic blocs (%), 2008 and 2015
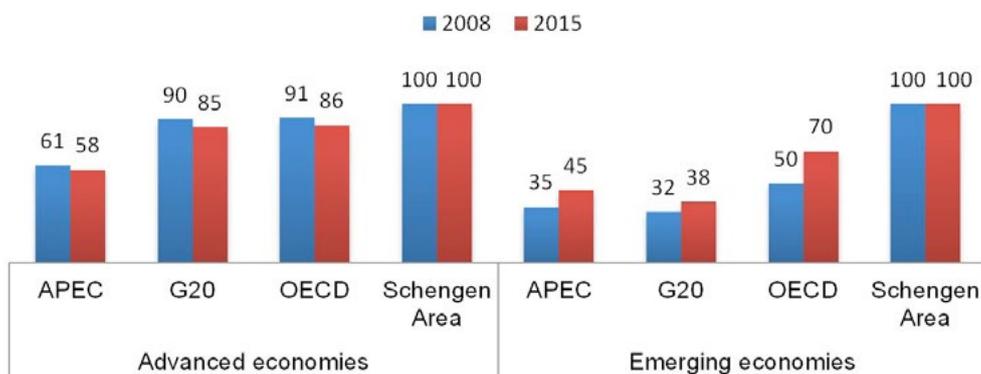
It is interesting to note that the benefits of visa facilitation are not strictly limited to members within economic and regional blocs but also affect the relationship with non-members. When looking more into detail, it becomes visible that similar to 2014, the average percentage of open reciprocity between member as well as non-members of regional and economic blocs remained higher than the average global 17% of open reciprocity between countries.

In total, seven regional and economic blocs have increased open reciprocity between members and non-members between 2014 and 2015 (Schengen, OECD, G20, OSCE, CAFTA-DR, APEC, and PAFTA). The majority of these seven regional and economic blocs only increased open reciprocity with non-members while remaining with the same amount of reciprocal visa exemptions between its own members.

The above-mentioned observations indicate that political and economic motives behind visa facilitation may be catalysts for a more strategic policy formulation and improvements which maximize the collective positive impact not only for the population of these blocs but also trigger improved visa policies for visitors.

Figure 9

Open reciprocity among members and between members and non-members of regional and economic blocs, 2015 (%)

■ Open reciprocity among members   ■ Open reciprocity between members and non-members

Bloc	Among members	Between members and non-members
World average	17	
Schengen Area	100	27
ECOWAS	93	2
ASEAN	89	14
OECD	83	24
G20	64	21
OSCE	61	15
SADC	44	8
CAFTA-DR	43	22
APEC	42	21
NAFTA	33	19
PAFTA	18	2
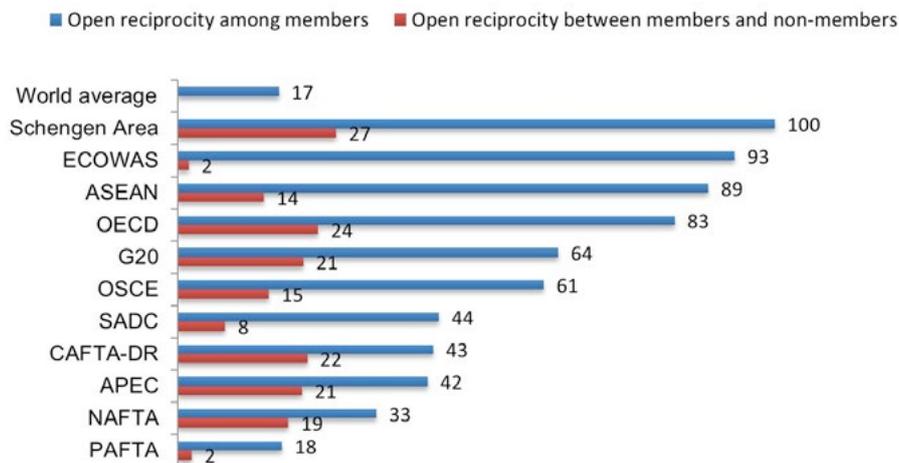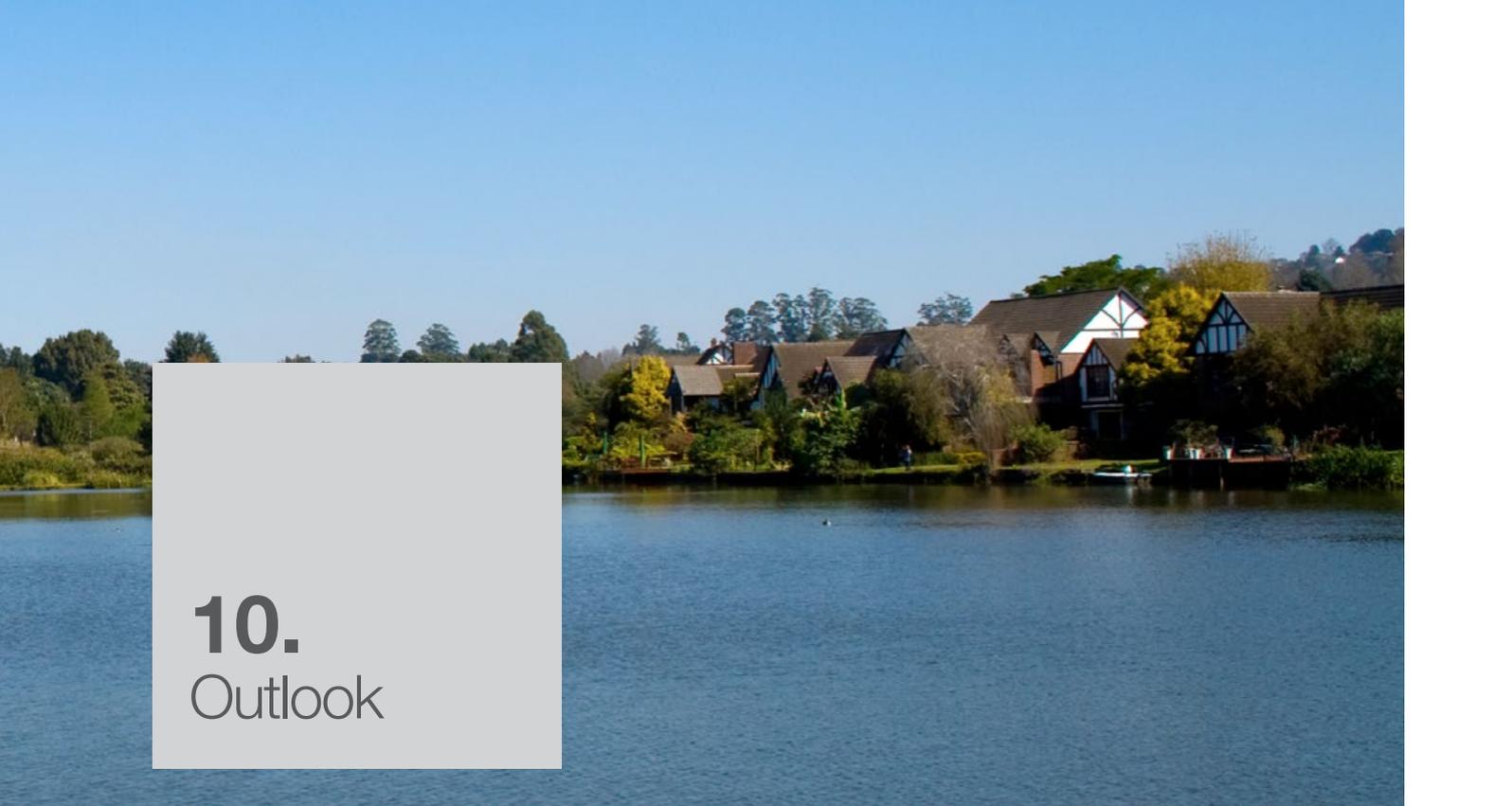
10.
Outlook

In 2015, visa facilitation has continued to be on the agenda of most destinations around the world, facilitating entry requirements and processes for temporary visitors even further. Since the UNWTO has prioritized visa facilitation as one of its core work areas in 2012, evidence for this growing momentum could be gathered by the Organization, highlighting trends, patterns and opportunities in respect to visa facilitation.

The continuous efforts made by governments in recent years and the consequently further approximation towards the political consensus that was already reached in 1963 to abolish complex entry formalities are especially due to the recognition of visa facilitation by national authorities as a strategic tool for economic growth and job creation.

For its implementation, destinations are increasingly aware of the opportunities provided by modern technology that supports them in extending processing capacities while, at the same time, enhancing security. Along with that, more and more destinations approach visa facilitation with carefully considered segmentation techniques and strategies that form part of a more holistic development approach, preparing destinations to fully reap benefits from the estimated 1.8 billion international arrivals by 2030.

In cooperation with the International Civil Aviation Organization (ICAO), the Organization for Economic Co-operation and Development (OECD), the Asia-Pacific Economic Cooperation (APEC), the World Travel & Tourism Council (WTTC) and other partners, UNWTO will continue advocating for visa facilitation to support economic growth and development through smart policy planning in tourism and will remain committed to provide case studies, benchmarking information as well as evidence of the relationship between visa facilitation and tourism growth.

Selected regional and economic blocs

Overview regional and economic blocs		
APEC (Asia-Pacific Economic Cooperation)	21 member economies	Australia, Brunei Darussalam, Canada, Chile, China, Hong Kong (China), Indonesia, Japan, Republic of Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan (Province of China), Thailand, United States of America, Vietnam
ASEAN (Association of Southeast Asian Nations)	10 member economies	Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam
CAFTA-DR (Dominican Republic - Central American Free Trade Agreement)	7 member economies	Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Dominican Republic, United States of America
ECOWAS (Economic Community of West African States)	15 member economies	Benin, Burkina Faso, Cape Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Côte d'Ivoire, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo
G20	44 member economies	Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, Republic of Korea, Turkey, United Kingdom, United States of America, Spain*, European Union**
NAFTA (North American Free Trade Agreement)	3 member economies	Canada, United States of America, Mexico
OECD (Organisation for Economic Co-operation and Development)	34 member economies	Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Republic of Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom, United States of America
OSCE (Organization for Security and Co-operation in Europe)	57 member economies	Albania, Andorra, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Canada, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Holy See, Hungary, Iceland, Ireland, Italy, Kazakhstan, Kyrgyzstan, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Mongolia, Norway, the Netherlands, Poland, Portugal, Romania, Russian Federation, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Tajikistan, Turkey, Turkmenistan, the Former Yugoslav Republic of Macedonia, Ukraine, United Kingdom, United States of America, Uzbekistan

PAFTA (Pan-Arab Free Trade Area)	16 member economies	Egypt, United Arab Emirates, Bahrain, Jordan, Tunisia, Saudi Arabia, Sudan, Syrian Arab Republic, Iraq, Oman, Qatar, Kuwait, Lebanon, Libyan Arab Jamahiriya, Morocco, Yemen
SADC (Southern African Development Community)	15 member economies	Angola, Botswana, Democratic Republic of the Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia, Zimbabwe
Schengen Area	26 member economies	Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland

*Spain is a permanent G20 invitee and is included in the report
**For the report, the EU was defined as the EU countries which have fully implemented the Schengen Agreement, i.e., all EU countries except Ireland, UK, Bulgaria, Cyprus and Romania.