G20
SOUTH AFRICA 2025

Solidarity
Equality
Sustainability

Priority 3:

Air Connectivity for Seamless Travel

Deliverable 3: Report on Air Connectivity for Seamless Travel

Presidency Document

UN Tourism

Knowledge partner to the South Africa G20 Presidency

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Executive Summary

Air connectivity is defined by the International Civil Aviation Organisation (ICAO) as the “movement of passengers, mail and cargo involving the minimum of transit points which makes the trip as short as possible, with optimal user satisfaction and at the minimum price possible.” [1]

This report explores the critical role of air connectivity for seamless travel as a driver of tourism development, particularly among G20 members and invited countries, where as a group air travel accounts for 57% of all international tourist arrivals.

As the tourism sector consolidates its recovery from the COVID-19 pandemic, air connectivity is an important factor in unlocking the sector’s economic and social development benefits while at the same time, economies need to continue advancing the transformation towards a more sustainable tourism transport. The report identifies key trends, enablers and challenges in air connectivity for seamless travel and includes a set of recommendations for G20 members and the Tourism Working Group.

Key Findings

- **Air travel is the main means of transport for international tourism worldwide** and in the G20 representing 57% of all international tourist arrivals globally and in the G20 members and invited countries’ group. Individually, it accounts for around 70% or more in more than half the G20 members and invited countries.
- **Key Enablers**:
    - **Infrastructure**: Modern airports, intermodal integration, and digital infrastructure.
    - **Regulatory Frameworks**: Air service agreements, opening market access while considering aspects such as fair competition and level playing field.
    - **Technology and Innovation**: Smart borders, biometric identity, e-visas, and long-haul aircraft enhancing direct connections.
    - **Sustainability**: Investments in Sustainable Aviation Fuel (SAF), Low Carbon Aviation Fuels (LCAF) and other cleaner energies, low-emissions aircrafts, and sustainable airport infrastructure and operations.
- **Multimodal Integration:** Seamless travel requires **door-to-door connectivity**, including air, rail, road, and maritime transport. Multimodal systems reduce travel time, spread tourism beyond major hubs, and promote more sustainable travel.

Challenges

- **Infrastructure constrains**, high operating costs, taxation, limited market access, unfair competition and lack of level playing field, and fragmented governance.
- **Environmental impact** and climate change mitigation and adaptation gaps and needs.
- **Disparities in regional connectivity**, especially in geographically vast countries and for island states where air connectivity is crucial for access
- **Technological gaps** and market dominance limiting competition in some regions.

[1] ICAO (n.d.), ‘Connectivity’, International Civil Aviation Organization, online available at: https://www.icao.int/sustainability/Pages/Connectivity.aspx (27-06-2025).

Trends and Opportunities

- **Improve Market Access**: Market access can drive route expansion and tourism growth.
- **Digital Transformation**: Paperless, contactless travel systems and integrated ticketing can significantly improve the traveller experience.
- **Tourism-Air Transport Alignment**: Policy coordination between tourism and aviation authorities is critical to plan, invest, and manage air connectivity for seamless travel.
- **Global Leadership by G20**: As key leaders in global tourism – accounting for 82% of global direct tourism GDP in 2023 – G20 members are well-positioned to set a global agenda for air connectivity that promotes seamless travel and sustainable tourism.

Policy Recommendations

1. **Enhance Coordination**: Establish national inter-ministerial platforms and mechanism linking tourism, aviation, and transport to drive effective coordination.
2. **Progress open air service agreements**: Advance opening of market access while considering aspects such as fair competition and level playing field
3. **Invest in smart infrastructure**: Prioritize smart, sustainable airport infrastructure with public-private partnerships (PPPs).
4. **Facilitate Travel**: Expand e-visas, digital ID systems, and inclusive biometric screening.
5. **Enhance Accessibility and leave no one behind:** Ensure accessibility planning and implementation throughout the whole travel experience.
6. **Support Workforce and MSMEs**: Support the development of quality employment opportunities, build skills and promote local participation in tourism value chains.
7. **Advance Sustainability**: Encourage low-emission aviation and consider, SAF, LCAF and other cleaner energies uptake, and sustainable infrastructure.
8. **Promote Multimodal Integration**: Enable rail-air ticketing, intermodal hubs, and real-time journey planning tools.
9. **Monitor and Measure**: Track the impact of air connectivity on tourism and adjust policies using updated and reliable data.

These Recommendations are voluntary and dependent of national priorities and circumstances.

Air connectivity plays an important role in facilitating international tourism, including within the G20.

Advancing air connectivity for seamless travel calls for a holistic approach – linking infrastructure, policy, technology, sustainability, and governance, and ensuring air connectivity supports tourism's contribution to socio-economic development while promotion inclusion and sustainability.

The G20 members accounting for 68% of all international tourist arrivals, 71% of international tourist exports and 68% of all passenger fares[2] are well-positioned to play a leading role in advancing this transformation in support of global mobility, equity, and prosperity.

[2] UN Tourism, World Tourism Barometer, May 2025; G20 Tourism and SDGs Dashboard

Introduction

Air connectivity - a key driver of tourism development

Data shows that in 2019, 57% of all 1.5 billion international tourists travelled by air. As international tourism faced the impact of COVID-19 this share declined to 51% in 2020 to recover to 56% in 2022.[3]

Among G20 members and invited countries, international tourist arrivals by air represent a diverse share of all international travel—ranging from 16% in China and 32% in South Africa or France, to over 80% in island destinations such as Australia, Ireland, Japan, the Republic of Korea, Singapore, and the United Kingdom. Notably, similarly high shares are also observed in non-island countries such as Egypt (89%), India (87%), Saudi Arabia (93%), and Spain (83%). In Brazil air transport represents almost 70% of all international tourist arrivals while in Türkiye and the United Arab Emirates it accounts for a share of 74%. This means that for more than half of G20 members and invited countries air travel accounts for 70% or more of all international tourism.[4]

ICAO defines **connectivity** as the "capacity of the transport value chain to move passengers, mail, or cargo from one point to another in the **shortest possible time**, with **maximum user satisfaction**, and at an **adequate price**.[5] In this context, air connectivity is thus important to promote tourism development impacting on the cost, ease and length of travel and therefore affecting destination and investment choice.

Meanwhile, **seamless travel** is defined[6] as "the provision of a **smooth, efficient, safe, secure and enjoyable travel experience from** a traveller's point of **origin to a destination, within the destination, and back again.**"

Seamless travel is the backbone for tourism to promote exchange among peoples, equality of opportunity and sustainable development, in line with the 2025 G20 theme and the 17 Sustainable Development Goals (SDGs), namely SDG 8 – Decent work and economic growth, SDG 9- Industry, innovation and infrastructure and SDG 10 – Reduce inequalities.[7]

Yet, enhancing air connectivity for seamless travel requires a comprehensive understanding of existing challenges and opportunities in air transport within the wider transport and tourism contexts. This report aims to form the basis of a future voluntary action plan for fostering partnerships between the tourism and transport sectors to promote seamless travel for the advancement of flagship projects in G20 members, such as the Single African Air Transport Market (SAATM) and an enhanced coordination among ministries and administrations in charge of tourism and civil aviation.

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[3] UN Tourism (2024), ´International Tourism Highlights, 2024 Edition´, online available at: https://www.e-unwto.org/doi/10.18111/9789284425808 (27-06-2025).

[4] UN Tourism (n.d.), *´UN Tourism Statistical Database´*, data for 2022 except for China, India and France – 2019, online available at: https://www.unwto.org/statistics (27-06-2025).

[5] ICAO (n.d.), 'Connectivity', International Civil Aviation Organization, online available at: https://www.icao.int/sustainability/Pages/Connectivity.aspx (27-06-2025).

[6] OECD (2020-11-18), "Safe and seamless travel and improved traveller experience: OECD Report to G20 Tourism Working Group", OECD Tourism Papers, 2020/02, OECD Publishing, Paris.

[7] G20 South Africa (2024), *´Concept Note and Calendar: G20 South Africa 2025 Presidency (1 December 2024 – 30 November 2025)´*, G20, online available at: https://g20.org/wp-content/uploads/2025/02/20241205v-FINAL-G20-CONCEPT-NOTE-SOUTH-AFRICA.pdf (27-06-2025).

G20 Tourism Work on Seamless Travel

"Progressing air connectivity will only be possible if all stakeholders and partners work together to maximise the benefits of air transport and the sustainable growth of aviation to connect more people and places, more often."[8]

The G20 members accounting in 2024 for 68% of all international tourist arrivals and 71% of total international tourism exports are well-positioned to play a leading role in advancing this transformation in support of global mobility, equity, and prosperity.

On the other hand, G20 members lead air travel both in terms of total traffic (international and domestic) as well as in terms of international travel. The USA, China, India, Japan, the United Kingdom, Brazil, Canada, Australia, Spain and Mexico accounted for the top ten countries in terms of overall departures in February 2025. The USA, the United Kingdom, China, Germany, Spain, France, Italy, the United Arab Emirates, Japan and Türkiye were the top ten countries in terms of international departures.[9]

Under Saudi Arabia's G20 Presidency in 2020, the G20 Tourism Working Group focused on promoting "safe and seamless travel" as a one of its priorities alongside community empowerment and development through tourism. The G20 Tourism Ministers Meeting Diriyah Communique[10] endorses the G20 Guidelines for Action on Safe and Seamless Travel and welcome the Safe and Seamless Travel and Improved Traveler Experience Report[11]. The ten points Guidelines focus on:

1. The importance of facilitating seamless travel as a driver of economic growth, enhanced safety and security, and an improved traveller experience, as well as enhanced local development, greater sustainability, and better visitor management.

2. Ensuring that tourism perspectives are reflected in policies and actions affecting travel to and within a country, requiring strong liaison between ministries responsible for tourism, national security, and transportation, together with other ministries, such as health.

3. International cooperation to explore standards for the collection, sharing and use of data on travellers, for identity checking, tracing and management purposes, taking into consideration requirements by the relevant international institutions and respecting national data laws and regulations.

4. Streamlining travel and visa processes, while maintaining security, including through online processes and bilateral and multilateral agreements, subject to each government's policy priorities and recognizing the sovereign right of States to control the entry of foreign nationals.

5. Promoting digital traveller identity and biometrics while respecting data privacy and national data privacy and sovereign laws based on agreed international standards and principles.

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[8] G20 South Africa (2024), *´Concept Note and Calendar: G20 South Africa 2025 Presidency (1 December 2024 – 30 November 2025)´*, G20, online available at: https://g20.org/wp-content/uploads/2025/02/20241205v-FINAL-G20-CONCEPT-NOTE-SOUTH-AFRICA.pdf (27-06-2025).

[9] ICAO (2024), *´Monthly Monitor – March 2025´*, International Civil Aviation Organization, online available at: https://www.icao.int/air-traffic-monitor - https://www.icao.int/sites/default/files/sp-files/sustainability/Documents/ICAO-Monthly-Monitor_February.pdf (27-08-2025). Countries are listed in number of departures.

[10] G20 Tourism Ministers Meeting (2020), *Diriyah Communiqué*, Virtual Meeting, 7 October 2020, online available at: https://www.g20.utoronto.ca/2020/2020-g20-tourism-1007.html (27-06-2025).

[11] OECD (2020), 'Safe and Seamless Travel and Improved Traveller Experience: OECD Report to G20 Tourism Working Group', *OECD Tourism Papers*, No. 2020/02, OECD Publishing, Paris, online available at: https://doi.org/10.1787/d717feea-en (27-06-2025).

6. Coordination of transport and tourism planning and operations in the provision of seamless links between different modes of transport, thereby benefitting visitors and residents, and improving destination connectivity and sustainability.

7. Encouraging and supporting the provision of real-time information and other assistance to travellers, including those with special needs.

8. Establishing, revising, and implementing crisis management, which require clear and effective communication with travellers on safety and seek coordination between governments and with industry on appropriate traveller safety standards and procedures.

9. Supporting, in coordination with other relevant authorities, capacity building and investment for seamless travel, including full broadband and extensive Wi-Fi coverage, inclusive training programs in digital skills, communication and customer care, and relevant research programs to guide policies and actions.

10. Recognizing the key role played by the private sector, including technology companies as well as transport and service providers, in enabling safe and seamless travel, and seeking to encourage and define their involvement through appropriate policy and regulatory settings and the formation of public-private partnerships (PPPs).

Air connectivity for seamless travel

The current report aims to provide an overview of the importance of air connectivity for seamless travel within G20 members and invited countries, identifying key enablers and challenges, highlighting good practices, and proposing possible areas for action.

Air connectivity, particularly critical for long distances, geographically constrained locations, and inbound tourism from distant markets, should be considered as one component within a wider multimodal transport context. While the report focuses on air connectivity for seamless travel, it recognizes the close links between seamless travel and sustainable mobility. Where alternative modes are possible their use and development should be promoted as a competitive alternative. In this sense, multimodality has therefore been included when relevant throughout the report and in a dedicated section. to reflect the needs of transport integration and future proofing

The report does not address in detail other key factors of seamless travel such as visa facilitation or visitor management which were included in the Report and Guidelines of the 2020 G20 Saudi Presidency.

1. Background

What is air connectivity

In broad terms, *air connectivity* refers to the **ability and ease for passengers (and freight) to reach different destinations by air**.

According to ICAO **connectivity** refers to the **"movement of passengers, mail and cargo involving the minimum of transit points which makes the trip as short as possible, with optimal user satisfaction and at the minimum price possible**."[12] This definition highlights thus three key elements to define connectivity:

- Time or duration of travel
- User's satisfaction
- Cost of travel

As per ICAO "to optimize connectivity; a strong supporting framework is needed. This includes, among other, market access (e.g. liberalization), optimal use of air navigations services (including ASBUs), aircraft, airport systems, facilitation and security, intermodality and airline activities".[13]

The World Bank uses an Air Connectivity Index (ACI) to measure a country's position within the global air transport network. This index assesses how well a country connects to other countries, considering both the ease of travel (low costs) and the diversity of connections.

The IATA Connectivity Index assesses the extent to which a country is integrated into the global air transport network calculating connectivity based on the number of annual seats to each destination weighted by the size of the destination airport, measures in the number of passengers it handles annually. The Index of each airport is calculated as the sum of destination-weighted available seats to all other airports while the country level connectivity is derived from the sum of all national airports.[14]

Measuring air connectivity is a complex exercise. Both indexes, however, suggest that higher levels of connectivity imply shorter, easier, and more accessible air travel – whether through more frequent connections, lower costs, improved infrastructure, or more efficient routes.

Tourism and air connectivity: key data, insights and trends

According to the International Transport Forum, the demand for global air travel has doubled every fifteen years and the projected continued growth in population and GDP per capita, namely in developing economies, suggests that demand for air travel will continue to grow.[15]

The world's population is expected to reach 8.6 billion in 2030. The approximately 2 billion people who will attain middle class status by 2030 will shape and create new demands for global connectivity[16]. In 2024 a total of 4.6 billon passengers flew globally according to ICAO, more than

[12] ICAO (n.d.), 'Connectivity', International Civil Aviation Organization, online available at: https://www.icao.int/sustainability/Pages/Connectivity.aspx (27-06-2025).
[13] https://www.icao.int/connectivity (28-08-2025
[14] IATA (2020). *´Air connectivity: Measuring the connections that drive economic growth´*. International Air Transport Association, November 2020. Online available at: https://www.iata.org/en/iata-repository/publications/economic-reports/economicsair-connectivity-measuring-the-connections-that-drive-economic-growth/ (27-06-2025).
[15] ITF (2024), 'Decarbonising Aviation: Exploring the Consequences', *International Transport Forum Policy Papers*, No. 140, OECD Publishing, Paris, pp. 1–60, online available at: https://www.itf-oecd.org/sites/default/files/docs/decarbonising-aviation-exploring-consequences.pdf (27-06-2025).
[16] International Bank for Reconstruction and Development / The World Bank (2019), *Global Connectivity Outlook to 2030*, World Bank, online available at: https://documents1.worldbank.org/curated/en/829491560927764816/pdf/Global-Connectivity-Outlook-to-2030.pdf (27-06-2025).

double the number registered in 2004. By 2050 air passenger numbers are expected to reach 12.4 billion.[17]

Such expansion in demand has been shaped by many factors – population growth, increased middle class with access to air travel, market liberalization, including the entry of low-cost carriers (LCCs) into the market and the European Single Aviation Market, the decline in air travel costs, technological developments, visa facilitation and major infrastructure developments.

The COVID-19 pandemic dealt an unprecedented blow to both air transport and tourism. Global passenger traffic plummeted by 60% in 2020 (-74% for international travel).[18] By 2022-2023, a robust recovery was underway thanks to pent-up travel demand, vaccine rollouts, and the easing of restrictions. Global air transport capacity and passenger demand reached around 90% of pre-pandemic levels by late 2023.At the end of 2024, total air traffic was 3.8% above pre-pandemic levels while international traffic surpassed 2019 levels by 0.5%.

Air transport in the G20 members and invited countries

Air transport is a key pillar of international tourism, carrying well over half of all travellers across borders at global level.

In 2019, an estimated 57% of all international travel arrived at their destinations by air – this is 855 million- making aviation the dominant mode of transport for global tourism. The remainder travelled by road (38%), sea (4%) or rail (1%)[19]. For geographically distant and island destinations, air travel is often the only feasible option. This underscores the importance of air connectivity for tourism and socio-economic development. Furthermore, existing literature shows a strong correlation between air connectivity and economic development, with even more definitive evidence in regions where alternative transportation options are limited.[20]

Among G20 members and invited countries as a group, international tourist arrivals by air represent 57% of the total, with a diverse share among countries - ranging from 16% in China and 32% in South Africa or France to nearly or more than 80% in islands destinations such as Australia, Ireland, Japan, Republic of Korea, Singapore, United Kingdom but also in non-island destinations such as Egypt, India, Saudi Arabia and Spain. In Brazil air transport represents almost 70% of all international tourist arrivals while in Türkiye and the United Arab Emirates it accounts for a share of 74%. This means that for more than half of G20 members and invited countries air travel accounts for 70% of more of all international tourism, showing the relevance of air connectivity for seamless travel and its impact on tourism development. In Africa, air transport is essential given the continent's vast geography and large number of landlocked countries. It connects production and consumption markets, supports intra-regional trade, and tourism.

In 2024, as travel rebounded from the pandemic, the G20 members received about 68% of all international tourist arrivals worldwide, generated 71% of tourism export earnings and accounted for 82% of the world's direct tourism GDP.[21]

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[17] ICAO (2024), *´Strategic Plan 2026–2050*, International Civil Aviation Organization´, online available at: https://www.icao.int/secretariat/SecretaryGeneral/Documents/ICAO-Strategic-Plan-2026-2050-V2.pdf (27-06-2025).
[18] UN Tourism (2024), *´International Tourism to Reach Pre-Pandemic Levels in 2024´*, UN Tourism Barometer, 19 January 2024, online available at: https://www.unwto.org/news/international-tourism-to-reach-pre-pandemic-levels-in-2024 (27-06-2025).
[19] https://www.e-unwto.org/doi/10.18111/9789284425808 World Tourism Organization (2024), International Tourism Highlights,2024 Edition, November 2024, UN Tourism, Madrid, DOI: https://doi.org/10.18111/9789284425808. https://www.e-unwto.org/doi/10.18111/9789284425808
[20] Airports Council International (2024), *´Airport Industry Connectivity Report 2024´*, Airports Council International, online available at: https://connectivity.aci-europe.org/wp-content/uploads/2024/07/ACI_Connectivity_Report_2024-1.pdf (27-06-2025).
[21] UN Tourism (2025), *World Tourism Barometer – March 2025*, United Nations World Tourism Organization, online available at: https://www.unwto.org/un-tourism-world-tourism-barometer-data (27-06-2025).

Among the G20 members and invited countries, air travel is also a key component of exports. In 2024, international fare receipts from passenger transport generated USD 201 billion in exports for the G20 members or 68% of the world's total[22].

Air transport is particularly important in the balance of payments of the USA (USD 38.5 billion) Türkiye (USD 21.9 billion or 6% of all exports), Germany (USD 17 billion in 2023), Ireland (USD 11 billion in 2023), France (USD 8.3 billion in 2023) and the United Arab Emirates (USD 7.7 billion in 2019).[23][24]

Table 1. International tourism and fare receipts, G20 members and invited countries, 2019 and 2024

Overview of international tourism and its economic importance in the G20 countries														
	International tourism						Exports		Share of tourism in total exports					
	Receipts		Passenger transport		Total revenues¹		Total		Receipts		Passenger transp.		Total revenues¹	
	Int. tourism receipts		Int. fare receipts		(Exports in Balance of Payments)				% of exports		% of exports		% of exports	
	(USD billions)		(USD billions)		(USD billions)		(USD billions)		(%)		(%)		(%)	
	2019	2024	2019	2024	2019	2024	2019	2024	2019	2024	2019	2024	2019	2024
World	**1,487**	**1,731**	**254**	**296**	**1,741**	**2,027**	**25,366**	**33,209**	**5.9**	**5.2**	**1.0**	**0.9**	**6.9**	**6.1**
G20	**1,014**	**1,228**	**176**	**201**	**1,190**	**1,429**	**18,965**	**23,615**	**5.3**	**5.2**	**0.9**	**0.9**	**6.3**	**6.1**
% of world	68	71	69	68	68	71	75	71						
Other	**473**	**503**	**77**	**95**	**551**	**598**	**6,401**	**9,594**	**7.4**	**5.2**	**1.2**	**1.0**	**8.6**	**6.2**
% of world	32	29	31	32	32	29	25	29						
European Union (27)	**425**	**508**	**76.6**	**85.4**	**502**	**593**	**7,696**	**8,979**	**5.5**	**5.7**	**1.0**	**1.0**	**6.5**	**6.6**
France	63.5	77.1	7.4	8.7	70.9	85.9	886	1,071	7.2	7.2	0.8	0.8	8.0	8.0
Germany	41.8	40.1	16.6	..	58.4	40.1	1,681	1,949	2.5	2.1	1.0	..	3.5	2.1
Italy	49.5	58.7	2.4	2.6	51.9	61.3	636	779	7.8	7.5	0.4	0.3	8.2	7.9
Russian Federation	11.0	7.6	6.3	1.0	17.3	8.6	482	475	2.3	1.6	1.3	0.2	3.6	1.8
Türkiye	34.3	56.3	11.5	21.9	45.8	78.2	254	373	13.5	15.1	4.5	5.9	18.0	21.0
United Kingdom	58.4	84.5	..	..	58.4	84.5	902	1,117	6.5	7.6	..	..	6.5	7.6
Saudi Arabia	16.4	41.0	3.4	5.4	19.8	46.3	286	361	5.7	11.4	1.2	1.5	6.9	12.8
South Africa	8.4	6.4	0.7	0.2	9.1	6.6	106	128	7.9	5.0	0.6	0.2	8.6	5.2
China	35.8	39.7	..	..	35.8	39.7	2,631	3,793	1.4	1.0	..	..	1.4	1.0
Japan	46.1	54.7	3.2	4.0	49.2	58.7	905	922	5.1	5.9	0.3	0.4	5.4	6.4
Korea (ROK)	20.9	16.7	4.6	5.3	25.5	22.0	661	835	3.2	2.0	0.7	0.6	3.9	2.6
Indonesia	16.9	16.7	1.5	1.0	18.4	17.7	200	301	8.5	5.6	0.7	0.3	9.2	5.9
Australia	45.5	51.8	2.2	1.8	47.7	53.7	342	425	13.3	12.2	0.6	0.4	13.9	12.6
India	30.7	35.0	0.9	2.0	31.7	37.0	546	822	5.6	4.3	0.2	0.2	5.8	4.5
Canada	29.8	49.4	..	..	29.8	49.4	564	727	5.3	6.8	..	..	5.3	6.8
Mexico	24.6	33.0	3.0	3.3	27.6	36.2	505	681	4.9	4.8	0.6	0.5	5.5	5.3
United States	199.0	215.0	40.1	38.5	239.1	253.6	2,546	3,191	7.8	6.7	1.6	1.2	9.4	7.9
Argentina	5.2	5.0	0.4	0.3	5.7	5.3	80	97	6.6	5.1	0.5	0.4	7.1	5.5
Brazil	6.0	7.3	0.1	0.0	6.1	7.4	259	388	2.3	1.9	0.1	0.0	2.4	1.9
Invited Countries (2025)														
Algeria	0.1	..	0.03	..	0.1	0.0	39	..	0.3	..	0.1	..	0.4	..
Egypt	13.0	..	1.2	..	14.3	0.0	54	..	24.3	..	2.3	..	26.6	..
Ireland	6.5	7.9	8.4	..	14.9	7.9	534	..	1.2	..	1.6	..	2.8	..
Netherlands	18.6	22.4	3.9	3.4	22.5	25.8	793	1,032	2.3	2.2	0.5	0.3	2.8	2.5
Nigeria	1.4	0.3	0.0	0.0	1.5	0.3	70	58	2.1	0.5	0.0	0.1	2.1	0.6
Norway	5.9	7.8	1.5	1.1	7.4	8.9	146	229	4.0	3.4	1.0	0.5	5.0	3.9
Singapore	20.3	23.8	..	..	20.3	23.8	665	979	3.1	2.4	..	..	3.1	2.4
Spain	79.7	106.5	..	..	79.7	106.5	487	642	16.4	16.6	..	..	16.4	16.6
Utd Arab Emirates	30.7	57.0	7.7	..	38.4	57.0	480	788	6.4	7.2	1.6	..	8.0	7.2

Source: UN Tourism, International Monetary Fund (IMF), World Trade Organization (WTO) and Organisation for Economic Co-operation and Development (OECD). ¹ Total revenues from tourism include international tourism receipts plus passenger transport, when available. The sum of country data may not add up to totals due to passeng. transp. estimates. For the following countries, tourism revenues include receipts only: Canada, China, Cyprus, Germany (for 2024), Singapore, Spain, Sweden, United Kingdom and United Arab Emirates (for 2024)

[22] UN Tourism (2025).
[23] IMF (2024), *´Balance of Payments Statistics Yearbook 2024´*, International Monetary Fund, Washington D.C., online available at: https://www.imf.org/en/Publications/Balance-of-Payments-Statistics/Issues/2025/04/19/IMF-Committee-on-Balance-of-Payments-Statistics-2024-Annual-Report-566330, (27-06-2025).
[24] World Bank (2023), *´World Development Indicators – Balance of Payments and Trade Services´*, The World Bank, Washington D.C., online available at: https://databank.worldbank.org/source/world-development-indicators (27-06-2025).

G20 members leading in air travel

According to IATA (Table 2), the USA ranks first in number of passengers (715 million) and flights (8.7 million) in 2023, supported by the highest aviation infrastructure score (6.2), airport accessibility (100%) and connectivity ranking (1). China follows in volume with nearly 600 million passengers and five million flights but with comparatively lower airport accessibility (73%).

European countries like Spain, Germany, and France combine high infrastructure scores (5.5–6.1) with strong connectivity and accessibility. In contrast, invited countries such as Algeria and Nigeria show low infrastructure development (below 3.0) and limited connectivity, while South Africa has a moderate airport network yet low passenger throughput.

High-performing outliers like India and Indonesia manage significant passenger volumes despite only mid-range infrastructure scores, suggesting growth potential. Overall, the data shows a clear correlation between infrastructure quality, international connectivity, and airport accessibility, with developed nations generally excelling across all three dimensions

Table 2. G20 members and invited countries key air transport indicators, 2023

Country	Airlines	Airports	Passengers (2023, millions)	Flights (2023,'000)	Aviation Infrastructure Score	Connectivity Ranking (direct connections only)	Airport Accessibility
Argentina	7	41	21.6	167	3.2	84	81%
Australia	23	169	74.4	703	5.2	39	90%
Brazil	11	144	87.2	836	3.9	49	73%
Canada	47	244	64	857	5.4	11	92%
China	61	236	599.5	4,984	5.3	13	73%
France	15	55	81.6	630	5.5	2	92%
Germany	17	30	76.8	709	5.4	6	100%
India	14	99	159.1	1,256	4.6	17	57%
Indonesia	24	127	82.8	723	4.3	81	79%
Italy	7	39	100.1	668	5.2	10	99%
Japan	23	79	142.9	1,058	5.3	30	99%
Rep. of Korea	11	15	56.9	345	4.7	22	100%
Mexico	16	61	80.2	653	4.4	50	92%
Russian Federation (2018)	41	169	76.1	675	na	na	69%
Saudi Arabia	4	27	52.7	356	5	14	64%
South Africa	13	26	17.9	187	3.7	28	81%
Turkey	11	55	76.9	639	5.5	3	91%
United Kingdom	23	63	128.6	952	5.9	5	100%
United States of America	76	696	715.1	8,708	6.2	1	96%

Invited countries							
Argelia	4	32	6.3	69	2.7	56	91%
Egypt	12	13	19.9	155	4.6	7	88%
Netherlands	7	5	24.4	245	5.4	8	100%
Nigeria	16	21	9	112	2.9	38	69%
Norway	4	48	20.9	298	na	35	99%
Singapore	3	2	20.4	154	5.9	23	100%
Spain	21	45	131.4	952	6.1	12	95%
United Arab Emirates	7	10	34.9	313	6.5	4	83%

Source: Based on Air Transport Action Group (2024), ´Aviation Benefits Beyond Borders, December 2024´, online available at: https://aviationbenefits.org/media/e5ynn4x0/abbb2024_full_report.pdf (27-06-2025).Notes: Connectivity ranking: ICAO Air Transport Bureau 2023 analysis ranking each country based on the number of countries and territories that can be easily reached from it by air, with a weighted average of the number of countries or territories that can be reached directly or with one or two stops in square brackets. Air transport infrastructure score: 1–7 score from the World Economic Forum Travel and Tourism Development Index 2024, based on the quality of the aviation infrastructure, using indicators such as air connectivity and capacity. Higher is better.

G20 Connectivity levels – IATA Connectivity Index

According to IATA's connectivity Index (Table 3), the United States, the United Kingdom, and Germany have the highest international air connectivity, globally. In terms of progress, Egypt, Saudi Arabia, and Türkiye show the best results each having more than doubled their international connectivity over the past decade.

Table 3. IATA International Air Connectivity Index, G20 members and invited countries, 2014-2024

G20 Members	Global rank (2024)	Growth 2024 vs. 2014
Australia	23	18%
Brazil	36	21%
Canada	13	37%
China	4	18%
European Union	n/a	n/a
France	9	37%
Germany	3	19%
India	10	64%
Indonesia	25	12%
Italy	7	61%
Japan	6	51%
Rep of Korea	12	32%
Mexico	16	85%
Russian Federation	33	-14%
Saudi Arabia	17	116%
South Africa	54	4%
Spain (permanent guest)	5	68%
Türkiye	14	106%
United Kingdom (UK)	2	42%

United States of America (USA)	1	38%

Invited countries		
Algeria	60	61%
Egypt	30	124%
Ireland	31	57%
Netherlands	21	32%
Nigeria	88	-7%
Norway	42	9%
Singapore	15	15%
United Arab Emirates (UAE)	8	39%

Note: The IATA International Air Connectivity Index measures how well countries around the world are interconnected via air transportation. It is based on a country's outbound international seat capacity, weighted by the economic 'importance' (proxied by total seat capacity handled) of destination airports. Source: IATA (2020). *´Air connectivity: Measuring the connections that drive economic growth´*. International Air Transport Association, November 2020. Online available at: https://www.iata.org/en/iata-repository/publications/economic-reports/economicsair-connectivity-measuring-the-connections-that-drive-economic-growth/ (27-06-2025).

Regulatory Framework among G20 members and invited countries: Air Service Agreements

According to ICAO data on Air Service Agreements (Table 4), the USA, the UAE, and Singapore have the most liberalized air service regimes, with widespread Open Skies (BOS) agreements.

India, China, Indonesia, and the Russian Federation rely heavily on Traditional (BTD) agreements while Germany, France, and Italy are mostly in a transitional phase (BTS), moving gradually toward liberalization.

Africa and parts of Asia show limited liberalization, with few BOS agreements in place. Overall, liberalized markets cluster around North America, parts of Europe, and key Asian hubs like Singapore.

These differences reflect the varied stages of development in global aviation and each country's national strategy regarding market access and competition.

Beyond individual country efforts, a significant trend in market liberalisation has been the inclusion of regional clauses in existing bilateral air services agreements and the the negotiation of regional air service agreements. These clauses and agreements can create significantly larger and more integrated aviation markets.

This is the case of the European Union. A foundational principle of the EU's internal single market for aviation is the freedom of establishment which implies that any EU air carrier can be designated by any of the 27 Member States to operate services under their respective bilateral air service agreements. For this principle of 'EU Designation' to take effect, the partner country in a bilateral agreement must agree to recognise it. Over the years, EU Member States have included this clause in many of their individual bilateral agreements, opening up routes to airlines from across the EU, not just their own national carriers. Building on this, the EU and its Member States also negotiates comprehensive, bloc-level Air Transport Agreements (Comprehensive Air Transports Agreements or 'CATAs') with partner countries and regions. These replace the member states' bilateral agreements with a single, more modern framework. They usually include the right for any EU airline to fly between any point in the EU and the partner country and go beyond traffic rights

to establish a framework for regulatory convergence in areas such as sustainability, aviation safety, security and competition law.

This model of regional integration is also being pursued in Asia and the Pacific and in Africa. The Association of Southeast Asian Nations (ASEAN) has developed the ASEAN Single Aviation Market (ASEAN-SAM). This initiative aims to liberalise air services among its member states and with key partners, seeking to enhance regional connectivity, tourism, and economic integration. In the same context, the Single African Air Transport Market (SAATM), a flagship project of the African Union Agenda 2063 of the African Union aims promote intra-regional connectivity between the capital cities of Africa by creating a single unified air transport market in Africa, as an impetus to the continent's economic integration and growth agenda. SAATM aims for the full liberalisation of intra-African air transport services in terms of market access, traffic rights for scheduled and freight air services by eligible airlines thereby improving air services connectivity and air carrier efficiencies. It aims to remove restrictions on ownership and provide for the full liberalisation of frequencies, tariffs and capacity. It also provides eligibility criteria for African community carriers, safety and security standards, mechanisms for fair competition and dispute settlement as well as consumer protection. As of March 2025, 38 African countries had joined the SAATM, with the number of countries growing since it was launched in 2018.

Table 4. Type of Air Service Agreement among G20 members and invited countries

	AUS	BRA	CAN	CHN	FRA	DEU	IND	IDN	ITA	JPN	KOR	MEX	RUS	SAU	ZAF	TUR	GBR	USA	DZA	EGY	IRL	NLD	NGA	NOR	SGP	ESP	ARE
ARG	BTS	BTS	BTD	-	-	BTD	-	BTS	BTD	-	BTD	BTS	BTD	-	-	BTS	BTD	BTS	-	-	-	BTD	-	BTD	BTD	BTS	BTS
AUS		BTS	BTD	BTS	BTD	BTD	BTS	BTS	BTD	BTD	BTD	BTS	BTS	-	BTS	BTS	BTS	BOS	-	BTS	BTD	BTD	-	-	BTD	BTS	BTS
BRA			BTS	BTD	BTD	BTD	BTS	-	BTD	BTD	BTD	BTS	BTS	-	BTD	BTD	BTD	BOS	-	-	-	BTS	BTD	BTD	BTD	BTD	BOS
CAN				BTS	BTD	BTD	BTS	BTD	BTD	BTD	BTD	BTS	BTS	BTS	BTS	BTS	BTS	BOS	-	BTS	BTD	BTS	-	BTD	-	BTD	BTS
CHN					BTD	BTS	BTS	BTD	BTD	BTS	BTD	BTD	BTS	BTD	BTD	BTD	BTD	BTS	BTD	BTS	-	BTD	BTS	BTD	BTD	BTD	BTD
FRA						BTD	BTS	BTD	BTD	BTD	BTD	BTD	BTS	-	BTD	BTD	BTD	BOS	BTS	BTD	BTD	-	BTD	-	BTD	BTD	BTD
DEU							BTS	BTD	BTD	BTD	-	BTD	BTS	BTD	BTS	BTD	BTD	BOS	BTD	BTD	BTD	BTD	-	BTD	BTS	BTD	BTS
IND								BTD	BTS	BTD	BTD	BTS	BTS	BTS	BTD	BTS	BTS	BOS	BTS	BTD	BTD	BTS	BTS	BTS	BTS	BTD	BTD
IDN									-	BTD	-	BTS	-	-	BTD	-	BTS	BOS	-	-	-	BTD	-	-	BTS	BTS	-
ITA										BTD	-	BTD	-	BTS	BTD	BTD	BTD	BOS	-	-	BTD	BTD	-	-	BTD	BTD	BTD
JPN											BTD	BTS	BTD	BTD	BTD	BTD	BTD	BOS	-	BTD	-	BTD	-	BTD	BTD	BTD	BTD
KOR												BTD	BTD	BTD	BTD	-	BTD	BOS	-	-	-	BTD	-	-	BTS	BTD	BTD
MEX													BTD	BTS	-	BTS	BTD	BOS	-	-	-	BTS	-	-	BTD	BTS	BTS
RUS														BTD	BTS	BTS	BTD	BTS	BTD	BTD	BTD	BTD	BTD	BTD	BTD	BTD	BTD
SAU															BTS	-	BOS	BOS	-	BTD	-	BTD	-	-	-	BTS	BTD
ZAF																-	BTS	BTS	-	BTD	BTS	BTS	-	BTS	BTS	-	BTS
TUR																	BTD	BOS	-	BTD	BTD	BTD	-	BTD	BTD	BTD	BTD
GBR																		BTD	BTD	BTD	BTD	BTD	-	BTD	BTD	-	BTD
USA																				BTD	BTS	BOS	BOS	BOS	BTS	BTD	BOS
DZA																					-	BTD	-	-	-	BTS	-
EGY																					-	BTD	BTD	BTD	BTD	BTD	-
IRL																						BTD	-	BTD	BTD	-	-
NLD																							BTD	BTD	BTD	BTD	BOS
NGA																								BTD	BTS	BTD	BTD
NOR																									BTD	BTD	-
SGP																										BOS	BOS
ESP																											BTS

Note**:** All entries in the "Type of Agreement" sheet come from ICAO's WASA and DAGMAR databases, except those highlighted in red. The red entries were taken from the official websites of the respective countries, where the relevant Air Services Agreements were publicly available. For detailed sources and relevant references, please refer to the References and Bibliography section of the report.

Legend on agreement typology:

- **B** – Bilateral: Traditional (BTD), Transitional (BTS), Open Skies (BOS)
- **M** – Multilateral: Traditional (MTD), Transitional (MTS), Open Skies (MOS)

Source: ICAO (n.d.), *Database of World's Air Services Agreements*, International Civil Aviation Organization, online available at: https://www.icao.int/sustainability/pages/Doc9511.aspx, (27-06-2025).

Insights and trends

- **Liberalization of air services:** Over the past two decades, gradual liberalization of air services – including, where applicable, open skies agreements and single aviation spaces such as that of the European Union – have greatly expanded air connectivity and reduced costs. Building on these developments, members may consider, in line with national circumstances it is important to encourage liberalization policies that are grounded in mutual benefit, fair competition and aligned with strategic priorities. Intra-regional connectivity is also improving within the Asia-Pacific, ASEAN Open Skies has allowed carriers like AirAsia to connect many Southeast Asian cities; within Africa, efforts are underway with the Single African Air Transport Market (SAATM) which Nigeria, South Africa, and others support to liberalize African skies and improve historically limited connectivity between African destinations. Low-cost carriers (LCCs) have also been a game-changer in terms of costs and in the opening up of many new point-to-point routes, often linking secondary cities that were not previously connected by direct flights. LCCs now make up almost a third of global airline capacity; in March 2023 they accounted for 32% of all scheduled airline seats globally, up from 29% in 2019 and 25% in 2015.[25]

- **Rapid growth in demand drives congestion and constrains in infrastructure:** The exponential growth in air travel demand has created increasing challenges related to congestion and infrastructure constraints, which together with increasing complaints from residents living nearby airports because of noise and reduced flight caps creates an increasing pressure. Coordinated planning between tourism and aviation stakeholders can help address these challenges and balance demand with capacity, while also enhancing operational efficiency.

- **Tourism demand rebounds for long-haul:** The pandemic temporarily shifted tourism towards more domestic and regional travel but as normalcy returned, there has been a resurgence of long-distance travel. One noteworthy development is the rise of new long-haul routes bypassing traditional hubs with new aircraft like the Airbus A350 and Boeing 787 Dreamliner making long-range flights more efficient even on thinner routes, potentially altering the connectivity map by giving more cities direct links.

- **Progressing the sustainability of International Air Transport: "**Acknowledging that international aviation emissions continue to account for less than 2% of total global CO2 emissions, and they are projected to increase as a result of the continued growth of air transport, unless action for emissions reduction is taken" as indicated in ICAO's Resolution A41-21: Consolidated statement of continuing ICAO policies and practices related to environmental protection — Climate change[26] in 2022, governments adopted ICAO's long-term global aspirational goal (LTAG) for international aviation to achieve net-zero carbon emissions by 2050 including operation improvement, technology, and efficiency. While the use of Sustainable Aviation Fuel (SAF) Low Carbon Aviation Fuel (LCAF) and other aviation cleaner energies remains limited and is likely to remain so in the short term, future efforts to decarbonize aviation will depend on a broader mix of solutions—including SAF, lower-carbon aviation fuels (LCAF), other clean energy sources, the development of low energy

[25] OAG (2023), *´Unstoppable LCCs – Growth Indicates a New Norm´*, Aviation Market Analysis Blog, online available at: https://www.oag.com/blog/unstoppable-lccs-growth-indicates-a-new-norm (27-06-2025).
[26] 41st ICAO Assembly Resolution A41-21: Consolidated statement of continuing ICAO policies and practices related to environmental protection — Climate change https://www.icao.int/sites/default/files/sp-files/environmental-protection/Documents/Assembly/Resolution_A41-21_Climate_change.pdf

aircrafts, and enabling regulatory frameworks. Progress towards ICAO's LTAG is being driven by a comprehensive basket of measures, including technological improvements, operational efficiency, increased use of SAF, and market-based measures. The ICAO Global Framework, endorsed at the third International Civil Aviation Organization (ICAO) Conference on Aviation and Alternative Fuels (CAAF/3) in 2023[27], supports the development and deployment of SAF, LCAF and other cleaner energy sources, with a collective target of reducing CO_2 emissions by 5% by 2030 through the use of SAF, LCAF and other aviation cleaner energies (compared to zero cleaner energy use). In pursuing this Vision, each State's special circumstances and respective capabilities will inform the ability of each State to contribute to the Vision within its own national timeframe, without attributing specific obligations or commitments in the form of emissions reduction goals to individual States. While the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA), the first global market-based scheme that applies to a sector, provides incentives for the uptake of cleaner energies backed by strong sustainability criteria. These transitions are expected to lead to higher air travel costs in the long term, with some estimates projecting a 25%–30% increase in prices by 2050.[28] At the same time, it is essential to implement policies that preserve connectivity for remote and aviation-dependent regions, ensuring a just and inclusive transition.[29]

- **Multimodality:** Several G20 members are working to improve the last-mile connectivity for air travellers. Many European airports are also rail hubs, and airlines like Air France and Lufthansa partner with rail companies to offer combined tickets, so tourists can fly into a gateway and then easily take a train to secondary cities or towns. In Africa, countries like Ethiopia and Kenya are successfully leveraging air connectivity for economic and tourism development.
- **Visa Facilitation:** The Tourism Visa Openness Index by UN Tourism shows that destinations' openness to international travel has rebounded to pre-pandemic levels following the lifting of COVID-19 related travel restrictions. Furthermore, it reports a decline in traditional visa requirements with fewer people worldwide now requiring a traditional visa to travel (from 77% in 2008 to 59% in 2018, and 47% in 2023), an increase in visa-exempt travel (21% of the world population do not need any form of visa, an increase from 17% in 2008 and 20% in 2018) and a major increase in eVisas (18% of the world population can apply for eVisas, an increase from 3% in 2013 and 7% in 2018). Among the G20, several members introduced or expanded e-visa programmes in recent years. Additionally, initiatives like APEC's Business Travel Card help facilitate mobility.

Furthermore, trends such as environmental challenges, changes in demand patterns and regulatory pressure on emissions are and are expected to continue influencing air connectivity.

[27] https://www.icao.int/sites/default/files/sp-files/environmental-protection/GFAAF/Documents/ICAO-Global-Framework-on-Aviation-Cleaner-Energies_24Nov2023.pdf
[28] ITF (2024).
[29] EASA (2019), *´European Aviation Environmental Report 2019´*, European Union Aviation Safety Agency, Cologne, online available at: https://www.easa.europa.eu/sites/default/files/eaer-downloads//219473_EASA_EAER_2019_WEB_HI-RES_190311.pdf (27-06-2025).

2. The role of air connectivity in fostering tourism development

Why and how is air connectivity essential for tourism development

Data indicates that for some G20 members, which include some of the world's largest and most visited nations, air connectivity serves as a foundation for tourism and economic development. Increasing air capacity – meaning either more flights (frequency), larger planes, or entirely new routes – may have a direct and often immediate effect on tourism provided there is latent demand or marketing to stimulate interest. Furthermore, it is essential for several reasons:

- **Bridging Long Distances:** Many G20 members are either geographically vast (e.g. Australia, Brazil, Canada, India, the Russian Federation and the USA) and/or far from major tourist source markets. Air travel can sometimes be the only means for international tourists to reach these destinations.
- **Diversification of Source Markets:** A well-connected air network allows a destination to tap into a diverse range of source markets, which is strategically important. If one market faces an economic downturn or any other challenges, others can compensate. Market diversification also helps smooth seasonality – G20 members can attract visitors year-round by targeting different markets with diverse travel patterns and segments.
- **Diversification of Destinations**: Improved air connectivity can catalyse tourism development in new regions within a country. For example, when secondary cities are served by international flights, they often see a growth in tourism demand and infrastructure (new hotels, attractions). This will promote a better distribution of tourism flows and contribute to local employment, inclusion, impact on communities, distribution of benefits and equity of access. In this sense, it is important to include community consultations and social participation mechanisms in decision-making regarding routes, hubs, or infrastructure.
- **Improved Competitiveness:** In a level-playing field between market actors, additional capacity may lead to reduce fares through economies of scale and competition, making destinations more affordable and attractive. This can be a strategic lever for increasing market share in tourism noting that the benefits of competition can only be realized when market conditions are fair. Without proper safeguards, dominant positions by individual market actors may emerge, potentially harming consumers. Ensuring a level-playing field among all market participants is therefore essential to foster competitive and consumer-friendly outcomes.

In summary, air connectivity plays a major role in tourism as it provides the accessibility, volume, and market reach that can sustain and expand the sector and its socio-economic benefits. Enhancing connectivity is therefore often reflected in national tourism policies and strategies as one of the several levers to support tourism development. It is both an outcome of other actions (market access, infrastructure improvements, marketing, etc) and a catalyst for further growth.

Key Enablers: Infrastructure, Regulatory Frameworks, Technology and Sustainability

Enhancing air connectivity for seamless travel requires a combination of enabling factors. Four key enablers stand out: **Infrastructure, Regulatory Framework, Technology and Sustainability.**

1. Infrastructure Development

- *Airport Capacity and Quality:* Airport Council International (ACI) estimates 2.4 USD trillion in airport capital investment will be needed by 2040.[30] G20 members have the world's busiest airports, handling tens of millions of passengers annually. Many G20 airports have undergone expansions or are building new facilities. These investments not only translate to more flights and improved service (e.g., reduced delays, better passenger experience), but—if aviation is to comply with global sustainability goals—they should also support the infrastructure needed to accommodate national sustainability priorities. A lack of capacity, by contrast, can constrain connectivity – for instance, slot constraints at airports limit how many flights and new routes can be added, potentially restraining tourism growth. In addition to country-level investments, development banks such as the African Development Bank (AfDB) are also playing a pivotal role. Notable examples include AfDB support for Ethiopia's Abusera International Airport (USD 7.8 billion) to boost regional capacity and Air Côte d'Ivoire's fleet modernization to improve West and Central Africa's connectivity. Nonetheless, across much of Africa, airport infrastructure remains inadequate and poorly maintained—especially in lower-income or landlocked countries. Upgrading facilities, improving multimodal access, and expanding cargo terminals are essential steps to unlocking regional connectivity and tourism growth.[31]

- *Hub Networks:* A well-developed hub increases connectivity options through one-stop flights. G20 members support their hub airports through policies and sometimes via home carrier strategies. Efficient hubs require not just physical capacity but also optimized processes to ensure connecting passengers can transfer smoothly (minimum connecting times, adequate transit facilities, etc.). This attracts more transit traffic and flights, benefiting the destination by increasing both direct and indirect connectivity.

- *Intermodal Links:* As discussed, connecting airports to other transport modes is an enabler because it enlarges the catchment area of the airport, improves the traveller experience and progresses sustainability. Many G20 airport projects now include integrated train stations, highway expansions, or even ferry links (in coastal areas). Such integration can be a deciding factor for an airline when choosing where to add flights – airlines know passengers value convenience, so an airport well-connected to the city and region is more attractive. Thus, infrastructure planning for connectivity needs to create an integrated system that supports high volumes of traffic.

- *Technology and Infrastructure:* In recent years, 'smart airport' technologies have emerged as enablers too – from automated check-in kiosks and biometric boarding gates to AI-driven traffic flow management. These innovations increase capacity and improve reliability without necessarily building new physical structures.

2. Regulatory Frameworks: Air routes and capacity are primarily governed through bilateral Air Service Agreements (ASAs). While more liberal agreements can create favourable conditions for increased connectivity, they do not automatically result in it.

[30] Airports Council International (2021), *´Global Outlook of Airport Capital Expenditure: Meeting Sustainable Development Goals and Future Air Travel Demand´*, Airports Council International, online available at: https://store.aci.aero/product/global-outlook-of-airport-capital-expenditure/ (27-06-2025)
[31] Africa Finance Corporation (2025)

Connectivity outcomes depend on a range of factors, including market demand, airline business models, infrastructure capacity, and regulatory environments. A comprehensive approach is therefore needed to realize the full benefits of more liberal agreements.

- *Market liberalization and open skies:* Some G20 members and invited countries have embraced efforts to remove restrictions on flights between countries, such as limits on the number of airlines, flights, routes, and fare-setting in their bilateral or multilateral agreements.[32] A key enabler in some of these policies is the inclusion of provisions that encourage liberalization based on mutual benefit, fair competition and strategic priorities, allowing carriers to operate more flexibly across international routes. Bilateral or multilateral agreements can also improve connectivity. In Africa, structural challenges like taxes, fees, and charges (TFCs), and limited market liberalization continue to be important barriers to air transport development. These reduce affordability and limit route development despite growing demand. In particular, fragmented airspace regulations, low passenger load factors, and weak cooperation among African airlines further reduce operational efficiency and deter investment—highlighting how regulatory constraints continue to hold back regional aviation integration.[33]
- *Ownership and Competition Policies:* Regulatory enablers also include policies like allowing competition and foreign investment. Easing these can enable cross-border airline joint ventures which might open new routes.
- *Visa and Border Regulations:* Although not part of air service agreements and not the focus of the report, simplifying visa regimes encourages airlines to start routes knowing demand will be higher. Similarly, agreements like pre-clearance can make a route more appealing to travellers, effectively boosting that connection.

3. Technology & Innovation: Technological innovation is a key enabler that works hand-in-hand with policy and infrastructure. Some points here overlap with infrastructure, but focusing on the **digital and passenger-facing side**:

- *E-Visas and Electronic Travel Authorization:* As mentioned, the move to electronic visas is growing globally as well as in the G20. This significantly lowers the barrier to travel and often increases demand, particularly for tourists looking to last minute bookings, leading airlines to add connectivity. The convenience of e-visas directly improves the appeal of a destination, effectively enhancing “connectivity” in the broader sense.
- *Smart Borders and Security Innovation:* Many G20 airports use biometric e-gates for passport control for eligible nationalities, cutting processing time. Some also use biometrics for boarding (matching face to the passport data) which can speed up boarding large aircraft. IATA’s One ID initiative aims for a future where a single biometric token (face or fingerprint) moves you through all checkpoints. Such tech-driven approaches enable more efficient and seamless passenger flows addressing infrastructure constrains and improving the travel experience.
- *Airline Operational Tech:* Airlines have innovated also to optimize connections – for example, apps that guide connecting passengers to gates, or AI that helps rebook misconnected passengers automatically. These improvements make connecting itineraries

[32] ITF (2019), *´ITF Transport Outlook 2019´*, OECD Publishing, Paris, online available at: https://doi.org/10.1787/transp_outlook-en-2019-en (27-06-2025).
[33] Africa Finance Corporation (2025)

more reliable and attractive, effectively increasing the quality of connectivity. Also, newer aircraft with longer range (enabled by tech innovation in aerospace) allow direct flights that previously required a connection.

- *Information & Language Technology:* For tourism to truly benefit, information needs to be accessible. Increasingly, destinations are using technology (like smartphone apps or AR/VR) to help visitors navigate upon arrival. While this is tangential to air connectivity, it does enhance the overall experience and encourages travel – a tourist who is confident they can use navigation or translation apps to get around is more likely to venture to distant places.

4. Sustainability. Sustainability is a crucial factor, and achieve "global net-zero GHG emissions/carbon neutrality by or around mid-century", while taking into account the latest scientific developments and in line with different national circumstances, taking into account different approaches including circular carbon economy, socio-economic, technological, market development and promoting the most efficient solution " as affirmed in the G20 New Delhi Leaders' Declaration[34]. The development of air travel should align with sustainability in its economic, social and environmental dimensions. In this context, it is important to note the need for mitigation – reducing emissions from aviation – alongside adaptation and to consider the broader context of emissions development in the sector.

- *Fuel Efficiency and New Fuels:* Technological progress has made each new generation of aircraft ~15-20% more fuel-efficient than the last. Many G20 governments incentivize this transition to new fleets through environmental standards or support for fleet renewal. On the other side, some G20 members are introducing blending mandates or funding Sustainable Aviation Fuel (SAF) production plants[35] and advancing Lower Carbon Aviation Fuel (LCAF) and other cleaner technologies as effective solutions to address emissions in civil aviation.
- *Regulatory Measures:* At the global level, through ICAO, countries agreed on the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) to reduce CO_2 emissions from international flights at 2019 levels, by requiring offsets for growth above that. Most G20 members are participating in CORSIA from its voluntary phase. These measures internalize the cost of carbon and encourage airlines to reduce emissions. These are market-based mechanisms that internalize carbon costs and support climate mitigation. However, broader sustainability requires complementary actions – such as innovation and inclusive connectivity – to ensure aviation grows responsibly, ensure future connectivity, addresses aviation's impact.
- *Airports and sustainable Infrastructure:* Airports are also progressing sustainability – many aim for emission-neutral operations by using nature-based solutions, efficiency standards, solar power, electric vehicles, and emission offsetting for their ground operations.
- *Climate Change Adaptation:* Sustainability also includes adapting to climate impacts such as extreme weather events. G20 investments in resilient infrastructure are important to ensure connectivity reliability in the face of extreme weather events.

[34] https://www.mea.gov.in/Images/CPV/G20-New-Delhi-Leaders-Declaration.pdf

[35] ITF (2023), *´ITF Transport Outlook 2023´*, OECD Publishing, Paris, online available at: https://doi.org/10.1787/b6cc9ad5-en (27-06-2025).

In summary, sustainability is about future-proofing air connectivity. G20 members are aiming for a balance where tourism can continue to grow, powered by air travel, while meeting Adevelopment goals. Progressing sustainability will require innovation and cooperation as well as policy and regulatory shifts alongside significant investment in line with national priorities and circumstances.

All four enablers – infrastructure, regulation, technology, and sustainability – are fully interdependent. Thus, a comprehensive approach is needed.

G20 Member Survey - Challenges and Opportunities

While G20 members have important opportunities to enhance air connectivity by acting in many of the areas identified as enablers in this report as well as on the areas of action that follow, they also face significant challenges. According to the survey conducted among G20 members and invited countries for the purpose of this report the following challenges and objectives have emerged (in alphabetic order).

Table 6. Results of the survey conducted among G20 members and invited countries

Challenges	Opportunities
Concentration and weak regional distribution	Better coordination to align tourism and aviation policies
Fragmented governance, policy and coordination barriers	Collaboration among tourism boards and air travel stakeholders
Growing demand and infrastructure constrains	Development of regional hubs
High fuels costs	Digitalization
High alternative fuels costs	Encourage nearby markets to choose alternative modes of transport
Global aircraft delivery delays	Expand domestic flights
High costs of infrastructure	Expand marketing support
High costs of long-haul flights	Improve service quality and efficiency
Increased competition from global hubs	Leverage data and intelligence
Vulnerability in face of external factors	Low emissions transitions
Regional or unilateral market mechanism that affect the agreed international global market	Multimodal transport integration
Regulatory barriers	Promote year around connectivity
Taxation on aviation	Strengthen codeshare and alliance agreements
Technological gaps	Regional distribution and hubs
Weak multimodality	
Weak marketing support	

Source: G20 and invited countries survey 2025, n=20

In conclusion, enhancing air connectivity for seamless travel in G20 members and invited countries comes with a complex set of challenges, but each also holds an opportunity for improvement or innovation.

By acknowledging capacity and sustainability issues and addressing them, G20 members can turn existing challenges and hindrances into drivers of progress through a thriving and sustainable tourism sector. By sharing experiences and solutions the Tourism Working Group can collectively raise the bar for the rest of the world.

3. The Role of Multimodal Mobility in Connectivity

Multimodal mobility refers to an integrated transportation approach where multiple modes of travel – air, rail, road, and even water – are coordinated to provide seamless end-to-end journeys. Integrating different modes offers several benefits: shorter overall travel times better experience for travellers, potentially lower costs, and environmental advantages.

The multimodal approach also contributes to sustainable tourism. Shifting short-distance trips from planes to trains or buses can reduce carbon emissions.

For multimodal mobility to truly enhance *seamless travel*, the following needs to be in place:

- **Infrastructure**: physical integration like co-located train stations at airports, bus terminals, car rental facilities, etc.
- **Scheduling Coordination**: aligning flight arrival/departure times with train and bus timetables to minimize waiting.
- **Ticketing Systems**: partnerships that allow one-stop booking and baggage check-through between airlines and ground transport (some systems still require collecting luggage and re-checking when switching modes, which is a pain point that can be improved).
- **Information and Signage**: making it easy for travellers to navigate transfers, with clear signs and possibly multilingual assistance at major junctions.

In summary, multimodal mobility is an essential component of connectivity in the tourism context extending the concept of connectivity from origin-to-destination air travel to door-to-door.

As G20 members pursue infrastructure upgrades, many are taking a holistic view by expanding airport capacity hand-in-hand with improving ground connections and integrating the travel ecosystem. This trend is expected to grow, with digital technology further tying modes together. Ultimately, the easier it is for travellers to move from their home to their destination's final stop, the more likely they are to choose that destination – making multimodal integration a key asset for tourism development.

4. Key Areas of Action

There are several **key areas of action** where G20 members can focus their efforts to enhance air connectivity for seamless travel both at national, bilateral and multilateral level. These are domains in which policy, investment, governance and collaboration can yield important results.

In this context, the following have been identified as possible areas of actions for G20 members and/or for the G20 Tourism Working Group. Through all of them partnerships as well as technological development are included as cross-cutting dimensions.

1. **Route Development: Enhancing marketing, financial and/or economic levers**
2. **Market Access: Opening of the skies and reducing regulatory barriers and airfares**
3. **Policy Coordination and Alignment: Creating a new governance between tourism and air transport**
4. **Multimodal Integration**
5. **Accessibility**

4.1 Route Development: Enhancing marketing, financial and/or economic levers

A key area of action is actively promoting the development of new air routes and the expansion of air service markets. This involves collaboration between tourism and civil aviation authorities, airports, and airlines to create conditions that make launching routes attractive and economically sustainable. It also entails strong coordination between national and local tourism and air transport stakeholders.

Actions and Strategies:

- **Incentive Programmes:** Many destinations use route incentive programmes. These can include temporary discounts on airport landing fees, joint marketing support, or even risk-sharing schemes for new routes. This often includes identifying priority routes and offering packages to airlines to initiate or expand flights. By reducing the initial financial risk, airlines are more willing to experiment with new destinations or increased frequencies.

  However, the risks and benefits of incentive programmes and development funds need to be carefully considered, to ensure sustainable demand and commercial viability on a route once the incentives end. It is also important in identifying new destinations have adequate tourism infrastructure and transport networks to support a grow in demand. Point to point long haul flights do not always create the best opportunities / enabler for establishing routes, instead airlines may look to utilise fifth freedom traffic rights at an intermediate stop, to top up passenger numbers to and from their destination as a way to make a route more commercially viable.

- **Route Development Funds:** Some countries or regions set up special funds or have regional development agencies that subsidize air routes deemed socially or economically less developed regions. A similar concept can apply for tourism: subsidize routes that bring in tourists to less-visited regions. However, this needs to be in line with competition rules and the principle of non-discrimination.

- **Air Service Development Units:** Many major airports have dedicated air service development teams that work closely with tourism boards. G20 members can ensure these teams have the necessary data and resources. A coordinated national strategy can amplify their effectiveness and highlight under-served city pairs.

- **Leverage Mega-Events:** Hosting big events (World Expo, Olympics, G20 Summit, etc.) often prompts route expansion. Japan saw new routes around the Rugby World Cup and Olympics period; Brazil around the 2014 World Cup and 2016.

Opportunities and Focus Areas in terms of source markets and destinations:

- **Underserved Destinations:** Identify important tourist spots that lack sufficient direct air service.
- **Long-Haul Emerging Routes:** With new aircraft capabilities, point-to-point long-haul is an area to explore.

4.2. Market Access: Addressing regulatory barriers

Open Skies and Air Service Agreements: Ensuring that bilateral or multilateral agreements permit the desired new routes is crucial. Modernized bilateral/multilateral air services agreements can support tourism development between countries, within regions, and across regions. Estimates from the European Parliament in 2017 indicated that since its creation the single market has added 2.2 % to the EU gross domestic product (GDP), increased employment by 2.8 million, and promoted inward investment into the EU economy.[36] As a basis for lifting restrictions, the EU Single Aviation Market was founded on a harmonised set of laws and regulations, notably with regard to aviation safety, aviation security, environment and fair competition.

4.3. Policy Coordination and Alignment: Creating a new governance between tourism and air transport

Enhancing air connectivity for seamless travel is also a governance challenge. It requires coordination among various stakeholders namely across different departments in government, local and national authorities and organizations, industry players, and international organizations.

Collaboration Mechanisms:

- **Joint Committees or Task Forces:** A practical governance approach is to form inter-ministerial committees that meet regularly, especially when forming policies that affect connectivity in consultation with the relevant designated organizations, while respecting their independent mandates and governance. Some countries have a Tourism Aviation Committee that involves the National Tourism Administration (NTAs) and Organizations (NTOs), Civil Aviation Authorities (CAAs), main airports, and sometimes representatives of airlines and travel industry.
- **Integrated Policy and Planning:** Effective coordination means giving tourism officials a seat at the table during air service agreement negotiations and infrastructure planning. Yet, most important it means that air transport strategy and vision is developed jointly. Tourism representatives should be actively involved in shaping transport strategies, infrastructure projects, and regulatory frameworks. Early engagement enables better alignment between connectivity development and tourism policy goals, delivering long-term socio-economic benefits.
- **Data and Intelligence Sharing:** NTAs and CAAs can share data – tourism boards have data on visitor profiles, seasonality, etc., while aviation has data on capacity, load factors,

route performance. Building joint data and intelligence systems strengthens both sides' decision-making.

- **Destination Management Integration:** By collaborating tourism and aviation can have a holistic approach to end-to-end journey. Tourism authorities can advocate for traveller-friendly measures in aviation operations (baggage handling, signage, language assistance, etc.), which they might otherwise have no influence over.
- **Crisis Management and Resilience in Air Connectivity**: Developing comprehensive preparedness and management frameworks to address man made and natural challenges is an essential step to strengthen the resilience of the air transport system and its interconnection with the tourism sector. This includes clear action plans with concrete possible measures at each phase (e.g. flight diversion protocols, contingency agreements between airlines and authorities, tourist information channels), assignment of responsibilities and multilevel coordination, while taking into account the competent authorities as well as the legal and regulatory framework.

The Role of Global Organizations

International organizations provide platforms to create knowledge, coordinate policies, set standards, and share good practices.

- ICAO's guidance material on the economic regulation of international **air transport** provides an instrument for countries to modernize their air service agreements in a way that balances the interests of all stakeholders and fosters connectivity. ICAO also encourage states to liberalize market access and improve facilitation. Notably, *Article 22 of the Chicago Convention obliges states to expedite navigation by aircraft and prevent unnecessary delays in immigration and customs formalities*. This underpins actions like implementing e-passports and sharing Public Key Directory data for easier passenger processing, which directly contribute to seamless travel. ICAO also leads initiatives like the Traveler Identification Program (TRIP) and promotes the use of One ID (traveller biometric recognition) in coordination with IATA – all aimed at creating a more seamless travel experience.
- **UN Tourism** – Considering the proven relevance and impact of air transport in tourism development UN Tourism has long been advocating for the creation of stronger coordination between tourism and aviation. The 20th Session of its General Assembly already in 2013 focused its ministerial discussion on Tourism and Air Transport Policies. This year, UN Tourism, ICAO and the Government of Angola hosted the 2nd UN Tourism and ICAO Ministerial Conference on Tourism and Air Transport in Africa, held in Luanda from 22 to 24 July 2025. Aligned with the UN 2030 Agenda for Sustainable Development and the African Union Agenda 2063, the Conference identified challenges and opportunities to enhance air connectivity and seamless travel across Africa, strengthen dialogue between tourism and air transport stakeholders to address key business imperatives and encourage political commitment to integrating tourism and air transport priorities into national and regional agendas. Likewise, UN Tourism Visa Openness Index provides a unique tool to track status and progress of tourism visa facilitation worldwide[37].

[37] UN Tourism (2024), *´Tourism Visa Openness Report 2023´*, United Nations World Tourism Organization, Madrid, online available at: https://doi.org/10.18111/9789284425044 (27-06-2025).

- **International Air Transport Association (IATA):** One of IATA's key initiatives is Simplifying the Business, which over the years introduced e-tickets, bar-coded boarding passes, and other steps that are now industry standard, saving time and cost for travellers. Currently, IATA's One ID project (biometric identification) is an example of industry-driven initiatives can make travel more seamless. IATA also provides platforms for coordination like schedule coordination conferences (important for slot-constrained airports), and it runs the clearinghouse for interline ticketing which allows different airlines to work together – an underpinning of smooth connectivity. For tourism, IATA's work means flights are more easily bookable, connections more reliable, and the passenger experience continually improved. Additionally, IATA partners with UN Tourism and ICAO on studies and working groups (for example, on tourism and climate or on travel facilitation) to bring the airline perspective to the table.

In summary, global organizations provide the **frameworks, data, and forums for collaboration** that can help ensure that national efforts add up to a more seamless global travel system.

4.4. Multimodal Integration

Actions and Strategies:

- **Develop Intermodal Hubs:** G20 governments can prioritize infrastructure projects such as airport express trains, metros, or coach terminals at airports. Such hubs also involve coordination of schedules – ensuring that, say, late-night flights are met with some form of ground transport options, not stranded passengers.
- **Integrated Ticketing and Baggage Handling:** One concrete action is to foster partnerships between airlines and surface transport operators for through-ticketing. A number of airlines (especially in Europe) partner with rail companies via platforms like AccesRail to sell combined tickets. G20 members can support this by adjusting regulations (for example, allowing code-sharing between airlines and trains). While logistically complex, expanding these services would make travel hassle-free.
- **Digital Journey Planning:** Encouraging the development of digital platforms that integrate route planning across modes is another action. Tourism boards or transport ministries can collaborate to support apps or websites that allow a user to input a destination and see a door-to-door plan. Tech firms are also working on AI-based travel assistants. By making multimodal options easily discoverable and bookable, destinations increase the uptake of those options, which in turn justifies maintaining or increasing their frequency – a virtuous cycle for connectivity.
- **Harmonize Standards:** An important action area is harmonizing standards for ticketing, security, and luggage across modes.

Multimodal integration yields shorter total travel times and a more seamless experience. Tourists can also reach destinations that are not served by an international airport by flying to the nearest hub and travel there by train or bus. This can spread tourism to rural or less-known areas (boosting their economies) and reduce overcrowding at primary destinations. It also tends to increase tourist satisfaction. From the connectivity standpoint, every improvement in intermodal links effectively extends the reach of every flight. A single flight to a hub can deliver tourists to dozens of final destinations through good onward connections.

4.5. Accessibility

Ensuring universal accessibility in air travel is a foundational element of sustainable tourism development. Air connectivity should be not only efficient and affordable but also inclusive enabling all travellers, including persons with disabilities, older individuals, and those with limited digital literacy, to navigate the travel experience safely and with confidence[38].

This requires the application of universal design principles in digital and biometric systems, the provision of alternative verification methods, and dedicated assistance services at all stages of the journey.[39] Furthermore, the provision of real-time information and traveller support tailored to individuals with special needs, helps to reduce stress, increase autonomy, and improve the overall quality of travel.

By embedding accessibility across infrastructure, digital systems, and customer service, countries can expand tourism participation, foster equity, and generate wider socio-economic benefits. Within the G20 framework, promoting accessible travel aligns with the broader commitment to sustainable development, ensuring that the tourism leaves no one behind.

5. Conclusions and Policy Recommendations

Conclusions

Air connectivity is a cornerstone of tourism development. This report has shown that enhancing air connectivity for seamless travel is a multifaceted task – involving infrastructure, regulatory frameworks, technological transformation, sustainability, marketing, economic and financial enablers for route development and effective governance.

The G20 members, which account for the around 70% global tourism flows, have both a strong incentive and responsibility to lead in air connectivity for seamless and sustainable travel.

In conclusion, several overarching themes emerge:

- **Governance and Coordination are Key:** Integration across modes of transport, across government agencies, across national and local authorities, across public and private sector and across international borders is essential for seamless connectivity.
- **Growth and Sustainability need to go Hand-in-Hand:** The future of air connectivity depends on making it ever more sustainable. However, progressing low-emission fuels, fleet renewal, and efficiency gains implies challenges. Acknowledging these constraints is essential to prioritize connectivity enhancements where they are most needed - which locations, destinations or regions should be prioritised for increasing air connectivity- and ensure growth stays within sustainability goals.
- **Resilience and Future-Proofing:** The pandemic and other disruptions have taught the importance of resilience and preparedness. Investments and policies should future-proof air travel against external shocks. This includes diversifying markets, developing rapid

[38] ISO (2021), *´Tourism and Related Services — Accessible Tourism for All: Requirements and Recommendations* (ISO 21902:2021)´, International Organization for Standardization, online available at: https://www.iso.org/standard/72126.html (27-06-2025)

[39] ICAO (2013), *´Manual on Access to Air Transport by Persons with Disabilities (Doc 9984)´*, 1st edition, International Civil Aviation Organization, online available at: https://store.icao.int/en/manual-on-access-to-air-transport-by-persons-with-disabilities-doc-9984 (27-06-2025)

response protocols and coordination mechanism for crisis management. A seamless system is also one that can adapt and recover quickly.

Recommendations

The G20 Tourism Working Group proposes the following policy recommendations, distilled from the report, for action at national level in accordance with national policies, regulations and strategies:

1. Facilitate coordination between tourism and aviation authorities on national level.: Create mechanisms for coordination—such as inter-ministerial committees – as per members specific governance structures and policy contexts.

2. Encourage Progressive Liberalization with Safeguards: G20 members should continue to champion liberal air service agreements while ensuring fair competition, open more routes and address regulatory barriers, impacting on tourism.

3. Plan demand and Invest in Capacity Ahead: Through proper planning and forecasting, seamless travel will depend upon the capacity to invest, including leveraging private capital via Public-Private-Partnerships (PPPs), to ensure that airports, air traffic systems, and multimodal linkages are expanded accordingly. In doing so, it is important to prioritize smart and sustainable infrastructure, so expansions facilitate innovation and sustainable development.

4. Enhance Passenger Facilitation and Reduce Travel Friction: Adopt a policy of *"paperless, contactless, and seamless"* travel. This involves expanding e-visas, embracing digital health certificates, and adopting biometric screening at immigration and boarding. Governments should collaborate with industry on setting up these systems, guided by ICAO and IATA standards. The end goal is that an international traveller can clear necessary formalities swiftly and with minimal physical documents – thus improving the overall travel experience and destination attractiveness.

5. Foster Accessibility in Air Travel. Air travel systems should be designed so that everyone can use them easily and equally. Making connectivity inclusive is essential to ensure tourism is accessible, fair, and beneficial to all. By making passenger facilitation both seamless and inclusive, G20 members can improve the overall travel experience, promote equitable access, and enhance the attractiveness of destinations for all tourists.

5. Support the Workforce, MSMEs and Communities: Connectivity is about people. G20 policy can support training for aviation and tourism professionals to avert skill shortages and promote service quality. Also, it can promote the inclusion of micro, small and medium enterprises by making sure smaller tourism operators can integrate the global distribution systems and benefit from new air links, or that local communities are prepared to host and benefit from the tourism development brought in by expanded air connectivity.

6. Collaborate Regionally and Globally: The G20 can lead in reforming or strengthening multilateral frameworks and promote creation and exchange of data and intelligence for policy actions as well as of good practices in policy and regulatory frameworks.

7. Monitor, Measure, and Adjust: Finally, implement mechanisms to monitor connectivity and tourism as part of the coordination between tourism and civil aviation. Develop indicators to measure connectivity and flows as well as the impact on tourism and the economy. This evidence-based approach will help fine-tune policies.

In order to enhance collective action, the following actions can be progressed by the G20 Tourism Working Group on a voluntary basis.

Area of Action	G20 Tourism Working Group
Data and Intelligence	Develop research on the economic impact of air transport in the G20 Share good practices at G20 meetings including G20 Tourism Working Groups and the G20 Tourism and SDGs Dashboard
Governance: Coordination and Alignment	Share good practices at G20 meetings including G20 Tourism Working Groups and the G20 Tourism and SDGs Dashboard
Market Access	Share good practices at G20 meetings and in the G20 Tourism and the G20 Tourism and SDGs Dashboard Develop research on the impact of open skies on tourism in selected G20
Route Development Marketing, Financial and/or economic levers	Share good practices at G20 meetings and in the G20 Tourism and the G20 Tourism and SDGs Dashboard
Technology and Innovation	Share good practices aimed at civil aviation and purchase preference of aircraft from G20 manufacturing members Share good practices at G20 meetings including and in the G20 Tourism Working Groups and the G20 Tourism and SDGs Dashboard
Climate Change Action	Share good practices at G20 meetings and in the G20 Tourism and the G20 Tourism and SDGs Dashboard
Multimodality	Share good practices at G20 meetings including in the G20 Tourism Working Groups and the G20 Tourism and SDGs Dashboard

On Priority 3: Connectivity for Seamless Travel, the G20 Ministers of Tourism have agreed in the Mpumalanga Declaration[40] to the following:

"We recognise that connectivity plays a crucial role in driving tourism development, with air travel accounting for 56% of all international arrivals and more than 70% for over half of G20 economies. We acknowledge that enhancing air connectivity for seamless travel promotes solidarity, coherence among peoples, equal opportunity and sustainable development. The development of air travel should align with sustainability in its economic, social and environmental dimensions. We further emphasise the importance of promoting the sustainable development of air travel supported by

[40] https://g20.org/track/tourism/

technological progress, innovation, and Sustainable Aviation Fuels (SAF), Low Carbon Aviation Fuels (LCAF) and other cleaner energies.

We acknowledge that an enhanced coordination between tourism and civil aviation administrations could help foster partnerships between the tourism and transport sectors, promote air connectivity for seamless travel and advance flagship projects in G20 economies such as the Single African Air Transport Market (SAATM).

We recognise the importance of multimodality in advancing the integration of various transport modes, including low-emissions alternatives to facilitate seamless travel, promote sustainable mobility and support the reduction of emissions by the tourism sector.

Recognising the different mandates of relevant ministries, we encourage G20 members and invited countries to champion modernised and comprehensive air service agreements. Updating these regulatory frameworks is a key opportunity to expand market access, open more routes, and support tourism development while promoting common goals in the areas of sustainability, aviation safety and security, and fair competition.

We encourage G20 members and invited countries to focus their efforts on the following areas of actions to enhance air connectivity for tourism at national, bilateral and multilateral level on a voluntary basis, in accordance with national policies, regulations and priorities:

a) Route development: enhance marketing, financial and/or economic levers;
b) Market access: open the skies, reduce barriers while ensuring fair competition;
c) Policy Coordination and Alignment: Create a new governance between tourism and air transport; and
d) Multimodal Integration and create conditions for Seamless Travel.”

Annex 1 – Examples

The following examples extracted from the research conducted for the Report are presented for illustrative purposes only and do not imply endorsement by part.

AFRICA

Initiative	Single African Air Transport Market (SAATM)
Launch Year / Agreement Year	2018
Objective	Liberalize intra-African air services market
Key Measures / Outcomes	Removal of market access restrictions, development of secondary gateways, regional implementation via Champion Regions, enhanced intra-African routes and lower fares, stronger hubs, improved cargo and passenger connectivity. Case examples further highlight this potential: **Rwanda's partnership with Qatar Airways** to establish a **cargo hub** demonstrates how strategic aviation investments can support national trade policies.
Stakeholders	African Union, AFCAC, Ministerial Working Group

AUSTRALIA

Initiative	Airport-Rail Link Expansion
Launch Year / Agreement Year	Ongoing
Objective	Improve airport access via public transport
Key Measures / Outcomes	Metro line to new Western Sydney Airport; Melbourne Airport Rail project under development.
Stakeholders	Federal and state governments, transport authorities

FRANCE

Initiative	Partnership between Air France and railway companies (SNCF, Eurostar)
Launch Year / Agreement Year	Ongoing
Objective	Strengthening the competitiveness of intermodality, creating seamless customer connections, and offering eco-friendly travel solutions.
Key Measures / Outcomes	• Allowing customers to book their entire journey, including flights and trains, on a single ticket with guaranteed connections. • Providing alternatives to short-haul flights. • Expanding the network to cities not served by air routes. • Supporting decarbonization.
Stakeholders	Air France, SNCF, Aéroports de Paris

EUROPEAN UNION

Initiative	Connectivity and Sustainability Initiatives
Launch Year / Agreement Year	Various
Objective	Improve sustainable and multimodal connectivity
Key Measures / Outcomes	• Establishment of a unified regulatory framework to ensure high standards in safety, security, environment, and fair competition • Based on this, creation of the EU Single Aviation Market, which removed restrictions on routes, frequencies, and ticket prices within the EU • Negotiation of collective Comprehensive Air Transport Agreements (CATAs) with key international partners to liberalise market access while creating common frameworks around sustainability, aviation safety, security, and fair competition. • Implementation of the Single European Sky initiative to make air traffic management more efficient • Launch of ReFuelEU Aviation, promoting the use of Sustainable Aviation Fuels (SAF) • Expansion of the TEN-T Network to develop a connected, multimodal transport system across Europe Economic impact: +2.2% GDP, +2.8 million jobs, increased inward investment (European Parliament, 2017)
Stakeholders	European Commission, Member States

GERMANY

Initiative	Sustainable Intermodal Travel in Europe (LIFT Transformation Project)
Launch Year / Agreement Year	2024
Objective	Identify and overcome technical and structural barriers to climate-friendly, cross-border intermodal travel in Europe
Key Measures / Outcomes	• Analysis of barriers to seamless intermodal travel • Recommendation for EU-wide standardisation of open data and booking system standards • Recommendation to integrate emissions data into travel platforms • Strengthened cooperation between transport providers and tourism operators • Policy and industry recommendations for scaling intermodal solutions

Stakeholders	German Federal Ministry for Economic Affairs and Energy (BMWE), Travel Industry

INDIA

Initiative	Metro-Airport Integration
Launch Year / Agreement Year	Ongoing
Objective	Reduce congestion and improve airport access
Key Measures / Outcomes	Airport Express Line in Delhi; Hyderabad and Bengaluru metro extensions to airports underway.
Stakeholders	Indian Ministry of Housing & Urban Affairs, metro authorities

JAPAN

Initiative	Air-Rail Integration
Launch Year / Agreement Year	Ongoing
Objective	Provide fast alternatives to domestic air travel
Key Measures / Outcomes	Shinkansen bullet trains connect to Tokyo airports; high-speed rail complements air services.
Stakeholders	Japan Railway companies, Ministry of Land, Infrastructure, Transport and Tourism

NETHERLANDS

Initiative	Action Agenda for Train and Aviation
Launch Year / Agreement Year	2020
Objective	Replace short-haul flights with rail
Key Measures / Outcomes	Integrated KLM-Eurostar tickets from Brussels; phased removal of short-haul flights.
Stakeholders	Ministry of Infrastructure, Schiphol, KLM, NS, ProRail

REPUBLIC OF KOREA

Initiative	Air-Rail Integration (KTX)
Launch Year / Agreement Year	Ongoing
Objective	Facilitate fast alternatives to flights
Key Measures / Outcomes	KTX high-speed rail connected to Incheon Airport, supporting seamless domestic mobility.
Stakeholders	Korean National Railroad, Ministry of Land, Infrastructure and Transport

RUSSIAN FEDERATION

Initiative	Airport Rail Services
Launch Year / Agreement Year	Ongoing (Vnukovo metro 2023)
Objective	Provide fast and reliable rail links to major airports
Key Measures / Outcomes	Aeroexpress rail links to Sheremetyevo, Domodedovo, Vnukovo; new metro at Vnukovo; services in Sochi, Kazan, Vladivostok.
Stakeholders	Russian Railways, city governments

SAUDI ARABIA

Initiative	Low Carbon Aviation Fuel (LCAF) and Cleaner Technologies
Launch Year / Agreement Year	Since 2023
Objective	Reduce emissions in civil aviation through clean energy solutions
Key Measures / Outcomes	• Promotion of Low Carbon Aviation Fuels (LCAF) and investment in cleaner aviation technologies • Support for ICAO climate goals (e.g., CORSIA)
Stakeholders	General Authority of Civil Aviation (GACA), Ministry of Energy, ICAO

Initiative	Air Connectivity Program
Launch Year / Agreement Year	Since 2021
Objective	Enhance air connectivity and tourism as part of Vision 2030 goals
Key Measures / Outcomes	• Launch of the Air Connectivity Program to attract new international routes and improve accessibility to tourism destinations • Both initiatives align with Saudi Arabia's Vision 2030 strategy
Stakeholders	General Authority of Civil Aviation (GACA), Ministry of Tourism, national carriers (e.g., Saudia)

UNITED ARAB EMIRATES

Initiative	Open Skies Advocacy Initiative
Launch Year / Agreement Year	Ongoing
Objective	Liberalize air service agreements and strengthen aviation hub status
Key Measures / Outcomes	160+ Open Skies agreements; major airport expansions; growth of UAE carriers; regulatory oversight.
Stakeholders	GCAA, Emirates, Etihad, Air Arabia, flydubai, government ministries

Annex 2 – G20 Members and Invited Countries Survey Case Studies

(G20 TWG South Africa Presidency Survey 2025)

G20 members and invited countries		Governance	Marketing Economic and Financial levers	Regulatory Framework	Infrastructure	Technological Developments	Sustainability
G20	Argentina						
	Australia						
	Brazil	X	X	X			
	Canada	X	X				
	China		X		X	X	
	France						
	Germany						
	India						
	Indonesia		X				
	Italy						
	Japan		X				
	Rep of Korea						
	Mexico						
	Russian Federation		X				
	Saudi Arabia	X	X				
	South Africa	X	X				
	Türkiye						
	United Kingdom						
	United States of America						
	European Union			X	X		
	African Union						
Invited Countries	Algeria						
	Egypt		X		X		
	Ireland						
	Netherlands						
	Nigeria						
	Norway						
	Singapore						X
	Spain*						
	United Arab Emirates		X	X	X		

Case Studies

The following case studies are sourced from the G20 Survey conducted under the South Africa Presidency and are presented for illustrative purposes only and do not imply endorsement by any part.

Brazil: Open Skies Agreement between Brazil and the United States

Challenges	• Regulatory limitations on the expansion of international flights • High concentration of flights between few city pairs • Lack of competitiveness in ticket prices
Initiative	Signed in 2011 and ratified in 2018, the **Open Skies Agreement between Brazil and the United States** eliminated restrictions on the number of flights, destinations and frequency between the two countries. Implementation was led by the Ministries of Foreign Affairs, Infrastructure and ANAC. Obstacles included resistance from parts of the aviation sector and delays in legislative ratification. These were overcome through intersectoral dialogue and alignment with commercial and tourism interests.
Actors	• Ministry of Foreign Affairs (main actor) • Ministry of Infrastructure • ANAC • Brazilian and North American airlines • Embratur and Ministry of Tourism
Beneficiaries	• Brazilian and foreign tourists • Tour operators • Airlines • Airports • Tourist destinations in secondary cities
Impact	The agreement allowed the growth of new direct routes between Brazilian and North American cities outside the Rio-Sao Paulo axis. There was an increase in competition, expanded access to tourist destinations and reduced fares. According to data from ANAC, the number of authorized weekly frequencies between Brazil and the USA increased from 301 (2018) to more than 370 in 2023.
Learnings	• Liberalization of airspace can increase tourist access. • Diplomatic and regulatory coordination is essential. • Expanding flights benefits destinations outside major hubs.
More info	https://www.gov.br/anac/pt-br/noticias/2018/brasil-e-eua-celebram-acordo-de-transportes-aereos

Brazil: International Tourism Acceleration Program (PATI)

Challenges	• Need to expand Brazil's international air connectivity • Encourage an increase in the number of flights and seats available for foreign tourists • Strengthen public-private partnerships in the aviation sector
Initiative	The **International Tourism Acceleration Program (PATI)** is an initiative that involves public-private partnerships with airlines and airports to increase the number of international flights to Brazil. The program is run by Embratur, with resources from the National Civil Aviation Fund (FNAC), in collaboration with the Ministry of Tourism and the Ministry of Ports and Airports. In the pilot phase, R$7 million was invested, with the aim of increasing the number of seats available and improving the experience for tourists at Brazilian airports.
Actors	• Ministry of Tourism (MTur) • Ministry of Ports and Airports • Embratur • National and international airlines • Brazilian airports
Beneficiaries	• International tourists traveling to Brazil • Brazilian tourism sector, including hotels, restaurants and tour operators • Local economy of regions receiving international flights
Impact	The program received 123 proposals for new flights or increased frequencies of existing flights. If all proposals were implemented, 932,617 new seats would be created on international flights to Brazil from October 27, 2024 to March 29, 2025. The initiative demonstrated the market's interest in expanding operations in the country and boosted international tourism in Brazil.
Learnings	• The importance of public-private partnerships for the development of the aviation and tourism sector. • The need for continued investment in infrastructure and promotion to attract international flights. • The strategic role of air connectivity in expanding tourism and strengthening the local economy.
More info	Embratur receives 123 proposals for new international flights in program notice to boost aviation sector — Ministry of Tourism

Canada: Travel Alberta's Air Access Strategy

Challenges	Increasing direct air access to Alberta from primary international markets in order to double the value of tourism in Alberta by 2035.
Initiative	**Travel Alberta**'s strategy focuses on direct flights between Alberta's two major international airports to improve Alberta's competitiveness as a business and leisure destination. This is an example of an air access model that was developed to positively impact regional air access and connectivity. The province of Alberta is a distinctly fly-to destination. More than 70% of US travellers and 85% of international travellers arrived by air in 2019. The model analyzes the scheduled number of seats on direct flights in order to identify priority markets by showing how many potential travellers could visit Alberta in a given month, and what international markets they may come from. By doing so, it may lead to travellers staying for longer periods of time and therefore accessing secondary and tertiary markets within the province.
More info	Travel Alberta website https://industry.travelalberta.com/research/tourism-indicators/air-access

China: Implementation Plan for the Development of General Aviation Industry in Inner Mongolia Autonomous Region

Challenges	• Regional Development Imbalance: Insufficient aviation services in western Inner Mongolia hindered tourism and economic growth. • Weak Regional Air Connectivity: Traditional airports could not meet short-haul, high-frequency travel demand. • Green Transition Pressures: Balancing aviation expansion with low-carbon technologies.
Initiative	The lead organizations of the implementation plan were the Inner Mongolia Government (primary), CAAC and the Ministry of Culture and Tourism. Among the key initiatives developed in 2024 are those related to: • Infrastructure: Connection of all regional airports to Grade II highways and general aviation airports to Grade III highways for 15-minute transfers. • Low-Altitude Tourism: Launched 3 themed routes (e.g., Hulunbuir Grassland, Alxa Desert) with more than four integrated tourism products. • Service Upgrades: 7 general airports added shuttle buses; 13 offered customized transport, serving more than 50,000 short-haul passengers annually.

	The harsh climate proved to be a challenge, for whichcold-adapted aircraft were deployed (Y-12, AC313 helicopters) with technical modifications. The funding of the initiative was secured through government subsidies (Inner Mongolia grants) and private partnerships (e.g., CITIC Offshore Helicopter).
Actors	• **Government**: Inner Mongolia Government (lead), CAAC, Ministry of Culture and Tourism. • **Private Sector**: CITIC Offshore Helicopter (aviation services), Loong Air (tourism route development). • **Communities & Tourists**: Residents (employment/income growth), domestic/international tourists.
Beneficiaries	• Remote Communities • SMEs • Tourists
Impact	• Network Expansion: 30 new short-haul routes were added by 2024, covering 12 emergency rescue bases. • Economic Growth: Low-altitude tourism revenue exceeded 100 million yuan CNY, creating 2,000+ jobs. • Service Efficiency: High-standard transit passengers reached 64 million in 2024, a year-on-year increase of 35%
Learnings	• Policy Integration: Cross-departmental coordination (transport, tourism, aviation) ensured alignment. • Technology Adoption: Deployment of adaptive aircraft and digital platforms (e.g., 5G-enabled airport management). • Public-Private Partnerships (PPP): Combination of government funding with private-sector expertise.
More info	https://www.nmg.gov.cn/zwgk/zfxxgk/zfxxgkml/202405/t20240516_2509390.html

China: Aviation Cooperation under the China-Singapore (Chongqing) Demonstration Initiative on Strategic Connectivity

Challenges	• Limited International Air Route Coverage: Low density of international routes in western China hindered global connectivity. • Regional Economic Integration Needs: Strengthening air links between inland China and Southeast Asia to support the "Dual Circulation" strategy. • Sustainability Pressures in Aviation: Balancing industry growth with carbon reduction under global environmental standards.
Initiative	The lead organizations of this cooperation were: • China: Chongqing Government, Ministry of Commerce, CAAC • Singapore: Ministry of Transport, CAAS The key achievements focused on four pillars: • Route Expansion: Launch of the "Lhasa-Chongqing-Singapore" route, boosting Chongqing-Singapore flights to 24/week (highest in W. China). • Infrastructure: Construction of the China-Singapore Aviation Industrial Park & bonded material hub (7 national centres), reducing costs by 20%. • Service Upgrade: Adoption of Changi Airport's management in Chongqing Jiangbei, attracting more than 110 international brands. • Technological Innovation: Co-development of vision-assisted landing of drones for low-altitude airspace. To provide solutions to the challenges, the policy focused on addressing gaps through a bilateral joint committee. The funding of the cooperation was secured through cross-border financing of $14.6B. In terms of sustainability, pilot SAF was carried out under the New International Land-Sea Trade Corridor's green logistics.
Actors	• **Government Agencies** A. China: Chongqing Commission of Commerce, China-Singapore Demonstration Project Administrative Bureau, CAAC. B. Singapore: Ministry of Transport, Economic Development Board. • **Private Sector**: A. West Air (route operations), Chongqing Zhongyue Aviation (technology), Singapore's Wicks & Co. (drone systems). B. International Organizations: International Civil Aviation Organization (ICAO) for policy guidance.

	• **Communities & Travellers**: Enterprises in western China and international passengers (226,400 travellers on Chongqing-Singapore routes from Jan–Nov 2024).
Beneficiaries	• Businesses: Cross-border trade firms reduced logistics costs via the New International Land-Sea Trade Corridor (covering 125 countries). • Travelers: Shortened travel time (e.g., Lhasa-Singapore via Chongqing saved 10+ hours vs. land routes). • Tourism Sector: Boosted bilateral tourism (Chongqing-Singapore routes accounted for 14.15% of Chongqing's international travellers in 2024). • Local Governments: Elevated Chongqing's status as a western hub, attracting FDI (e.g., Singapore's AirAsia established manufacturing in Chongqing).
Impact	The route performance registered 1,808 flights and 226,400 passengers on Chongqing-Singapore routes in 2024. Over 3,000 freight trains operated through the New International Land-Sea Trade Corridor, transporting more than 1,150 product categories. The carbon emissions from aviation material logistics were reduced and the SAF tests set benchmarks for the decarbonization of the industry, providing a positive environmental impact. As for the technological advances, the drone-assisted landing system filled a domestic R&D gap, enhancing low-altitude flight safety.
Learnings	• Multi-Stakeholder Collaboration: Government leadership, corporate execution, and international support ensure synergy. • Infrastructure-Policy Synergy: Route expansion requires innovations such as stockpile materials policies and cross-border financing. • Localized Global Expertise: Adoption of Singapore airport management models while advancing domestic R&D (e.g., drone systems).
More info	https://www.163.com/dy/article/JK IU33140514R9L4.html

Egypt: Integrated Air Connectivity and Tourism Revitalization Programme

Challenges	• Limited Air Connectivity to Key Markets: Expanding and enhancing air connectivity to and from key international destinations, particularly within the G20 members, to increase the flow of tourists and improve accessibility for travellers. • High Air Travel Costs: Addressing the issue of high airfare by promoting partnerships with low-cost carriers, optimizing flight routes, and offering incentives to reduce the cost of travel, making it more accessible for a broader range of tourists. • Infrastructure Limitations at Regional Airports: Enhancing the infrastructure of regional airports to support increased air traffic and ensure smoother and more efficient connectivity, particularly for tourists visiting less-accessible areas of Egypt.
Initiative	The Programme implementation steps were: • Expansion of air routes: Increase of direct flights from key international destinations, especially G20 members, to major Egyptian cities. • Airline incentives: Introduction of fee exemptions and subsidies to encourage airlines to operate additional routes to Egypt. • Infrastructure development: Upgrading of airport facilities, including terminal expansions and enhancement of passenger services, to accommodate increased traffic. • Marketing campaigns: Launch of joint promotional efforts with international partners to boost Egypt's visibility as a tourist destination. There were regulatory challenges to the implementation of the programme: bureaucratic delays were faced in route approvals, which were overcome by streamlining processes and enhancing inter-ministerial coordination. In terms of infrastructure constraints, some airports face limited capacity, which was addressed through phased upgrades and prioritizing high-traffic terminals.
Actors	• Ministry of Tourism and Antiquities: Leading the overall strategy and coordination for tourism and air connectivity. • Ministry of Civil Aviation: Managing air routes, airline incentives, and airport infrastructure development. • Private Sector (Airlines): Airlines expanding and optimizing international flights to Egypt. • Tourism Enterprises and Local Businesses • Hotels, travel agencies, and tour operators benefiting from increased tourism. • International Organizations (e.g., UN Tourism): Offering expertise and support for tourism development and promotion. • Travelers and Tourists • Beneficiaries of improved air connectivity, influencing demand.

	• Donors and Development Partners: providing funding and technical assistance for infrastructure and marketing.
Beneficiaries	- Tourism Sector Stakeholders - Local Communities - Airlines and Aviation Industry - Government and Public Sector - International Tourists and Travelers Overall, the initiative benefits Egypt's economy and all involved stakeholders, contributing to sustainable growth in the tourism and aviation sectors.
Impact	The "Integrated Air Connectivity and Tourism Revitalization Program" led to a 15-20% increase in international tourist arrivals, especially from Europe, Asia, and North America. It enhanced air connectivity with G20 members, introducing new direct flight routes and reducing travel time. Local businesses in tourism-centric regions saw increased demand, driving job creation in hospitality, transport, and retail. Public-private partnerships strengthened the tourism ecosystem, with joint marketing campaigns elevating Egypt's global profile. Additionally, investments in airport infrastructure improved passenger experiences, reducing processing times and enhancing overall satisfaction. These outcomes collectively contributed to a more resilient and attractive tourism sector, fostering economic growth and positioning Egypt as a leading global tourism destination.
Learnings	- Collaboration is Key: Effective public-private partnerships are essential for overcoming challenges in air connectivity and tourism development. Cooperation between government, airlines, and local businesses leads to better results. - Infrastructure Investments Pay Off: Upgrading airport infrastructure and improving operational efficiency can significantly boost both air travel and the overall tourist experience, fostering long-term growth. - Tailored Marketing Strategies: Targeted marketing campaigns that promote specific regions and experiences to key international markets, especially in G20 members, are crucial for increasing tourist arrivals and sustaining demand.
More info	N/A

European Union: Support to the aviation sector in Africa

Challenges	• Low compliance with international aviation safety and environmental standards • Fragmentation of the African aviation market and limited integration • Limited institutional capacity and technical expertise in aviation authorities
Initiative	The **EU Support to the Aviation Sector in Africa** is a regional project covering Sub-Saharan Africa. It merges two previous programmes: Aviation Safety in Africa and Support to the Single African Air Transport Market (SAATM). The lead actor is the European Commission, with implementation by the European Union Aviation Safety Agency (EASA). The steps taken for its implementation were: 1. Adoption of the Commission's Implementing Decision on 4 June 2024. 2. Allocation of EUR 10 million from INTPA funds. 3. EASA to begin implementation in the second half of 2025.
Actors	• Leading Actor: European Union Aviation Safety Agency (EASA) • European Commission (DG INTPA, DG MOVE) • African Civil Aviation Commission (AFCAC) • African Union (AU) • National Civil Aviation Authorities in Sub-Saharan Africa • Regional Economic Communities (RECs) • ICAO (International Civil Aviation Organization) • Airline companies, airport authorities, and aviation training academies • Travellers and cargo operators
Beneficiaries	• African national civil aviation authorities • Policy makers and regulators in the aviation sector • African airline companies and airport operators • Passengers and freight customers, benefiting from safer, more reliable services • Regional economies, through improved connectivity and trade
Impact	The project aims to promote a safe, sustainable, and integrated aviation market in Sub-Saharan Africa, improve compliance with international aviation rules, enhance aviation capacity, and strengthen exchanges between EU and African aviation authorities.
Learnings	N/A
More info	Previous project: https://www.easa.europa.eu/en/domains/international-cooperation/technical-cooperation-projects/eu-africa-safety-aviation-eu-asa#:~:text=This%20technical%20assistance%20project%20is,effective%20aviation%20safety%20oversight%20system

Indonesia: Affordable and Accessible Air Connectivity for Tourism Growth

Challenges	● Geopolitical conditions impacting flight costs. ● Heavy concentration of international flights into Jakarta and Bali, limiting dispersal of tourists to other high-potential destinations ● High domestic airfare costs for inter-island travel. ● Limited integration between air and sea transport services.
Initiative	The government implemented policies and programs to improve air connectivity, including: 1. Domestic Ticket Price Reduction Policy – coordinated by the Ministry of Transportation, airlines, and SOEs to make ticket prices more affordable, especially during national holidays. 2. Direct International Access Program – aimed at opening direct international routes to at least five Priority Tourism Destinations outside Bali and Jakarta, such as Labuan Bajo, Mandalika, Manado, Toba, and Likupang. This includes route development incentives, airport infrastructure upgrades, and partnerships with airlines/tour operators. 3. Seamless Travel Enhancements – **Electronic Visa on Arrival (e-VOA)**, **Indonesia Tourism Exchange (ITX)**, and a proposed **integrated travel booking platform** covering flights, local transport, and tourism activities. 4. Sustainability Measures – promotion of sustainable aviation fuels, are encouraged to address the rise in carbon emissions from increased flight frequencies.
Actors	● Airlines (Garuda Indonesia, Citilink, Batik Air, AirAsia) ● Coordinating Ministry for Infrastructure and Regional Development ● Ministry of Tourism ● Ministry of Transportation ● Airport operators (Angkasa Pura I & II) ● Local tourism boards
Beneficiaries	● Domestic and international tourists ● Local communities ● Local tourism MSMEs ● Hotels and tour operators
Impact	● Domestic ticket prices reduced by up to 14% during national holidays ● New direct flights from Singapore, Kuala Lumpur, and Sydney to Labuan Bajo and Manado ● 15% increase in international arrivals to secondary destinations in 2024

	• Reduced travel time and costs, leading to longer stays and higher spending
Learnings	• Reduction of airport costs and land travel costs • Additional incentives (e.g., VAT reduction) • Targeted route incentives and infrastructure investment accelerate tourism dispersion • Strong coordination between aviation and tourism sectors is essential • Multimodal (air–sea) solutions can improve last-mile connectivity in archipelagic regions
More info	Domestic ticket price reduction: https://setkab.go.id/harga-tiket-domestik-turun/ Direct International Access: https://www.kemenpar.go.id

Japan: Policy package for a full recovery of outbound travel

Challenges	• The improvement of international mutual understanding • Maintenance and expansion of airline network and expansion of inbound and outbound two-way exchanges
Initiative	In order to expand two-way exchanges with both inbound and outbound travel, the Japan Tourism Agency of the Ministry of Land, Infrastructure, Transport and Tourism has taken the lead in promoting outbound travel under the three pillars of “Establish a cooperation scheme with other countries and regions,” “Conduct strategic and effective promotion,” and “Develop safe and secure travel environment and promote youth exchanges.” The actual performance in 2024 was about 65% of the 2019 level of 20 million Japanese outbound visitors in 2025, which is the outbound target. To achieve the target, “More Abroad! Declaration” in March 2025, the public and private sectors are working together to build momentum.
Actors	• Japan Tourism Agency • Japan Association Of Travel Agents • Travel agents, airline companies and airports • Foreign countries • Foreign Government Tourist Office • Schools（junior high school, high school）
Beneficiaries	• Japanese citizens • Travel agents and airline companies • Foreign countries
Impact	The Japan Tourism Agency's efforts are expected to increase the number of Japanese travelling abroad, which will not only improve the international sensibilities of Japanese citizens and promote international mutual understanding, but also lead to the maintenance and expansion

	of the airline network and other measures to expand both inbound and outbound exchanges.
Learnings	Compatibility with international economic conditions (foreign exchange and price trends) and safety and infectious disease countermeasures in the destination country.
More info	https://www.mlit.go.jp/kankocho/seisaku_seido/kihonkeikaku/inbound_kaifuku/outbound/sokushin/wakamono.html https://www.mlit.go.jp/kankocho/seisaku_seido/kihonkeikaku/inbound_kaifuku/outbound/sokushin/destination.html

Saudi Arabia: JNB / JED Route

Challenges	• Code sharing between Saudi Airlines & international Carriers. • Optimize Airport slot allocation in Saudi Airports. • Partnership with local OTAs and Tour operators. • Airline available fleet, network strategy and required “feeder network”.
Initiative	• Code sharing between Saudi Airlines & international Carriers. • Optimize Airport slot allocation in Saudi Airports. • Partnership with local OTAs and Tour operators. • Airline available fleet, network strategy and required “feeder network”
Actors	Air connectivity program (ACP) Saudi / South Africa Civil aviation Ministry of tourism & Saudi tourism authority Saudia Airlines Riyadh Airport
Beneficiaries	Saudi Arabia & South Africa economy: • JNB & RUH Airports • Saudi Airlines • Passengers
Impact	The JNB/JED route has been operating seasonal flights from December 2023 to May 2024, resulting in economic impact of approximately 68 million SAR.
Learnings	N/A
More info	N/A

Saudi Arabia: “China Initiative”

Challenges	• Code sharing between local Saudi Airlines & international airlines. • Saudi Arabia airports Slots. • Partnership with local OTAs & Tour operators.
Initiative	The objective of this initiative is to attract 1.3 million Chinese tourists by 2025 by increasing flight frequencies and destinations with existing carriers and introducing new carriers. This initiative leverages China's status as one of the G20 members and the substantial trade volume between China and Saudi Arabia.
Actors	ACP STA Ministry of tourism GACA Matarat
Beneficiaries	Saudi Arabia & China economy China and Saudi Airports China and Saudi Airlines Passengers
Impact	The country has successfully partnered with five Chinese airlines and Saudia to establish routes connecting China and Saudi Arabia. This includes Cathay Pacific's service from Hong Kong (China) to Riyadh, Air China's from Beijing to Riyadh, China Eastern Airlines from Shanghai to Riyadh, China Southern Airlines' from Beijing and Shenzhen to Riyadh, and Hainan Airlines' from Xi'an and Haikou to Riyadh. These new routes have collectively contributed to an economic impact exceeding $650 million, projected through 2024.
Learnings	N/A
More info	N/A

Russian Federation: Expansion of regional air network

Challenges	• Increase accessibility of transport services for people in remote areas or small towns and provide them with the possibility to become the part of economic activity of the country; • Stimulate local tourism business in order to increase their income and create new jobs; • Encourage economic integration between different regions.
Initiative	The initiative is aimed at the creation of effective infrastructure in different regions of Russia to provide seamless travel, as well as contribute to the economic well-being of citizens. The following steps were taken: 1. Demand analysis: the routes and directions with the highest demand were identified (the places with no air connection or it is insufficiently developed) 2. Partnership with the federal and regional authorities in order to receive subsidies for development of new routes, and consequently provide citizens with reasonable rates 3. Investment in fleet: renewal and expansion of aircraft fleet allow making flights safer and regular, as well as gaining consumer trust.
Actors	• Azimuth air company • Ministry of Transport of the Russian Federation • Federal Air Transport Agency • Tour operators • Air-ticket aggregators
Beneficiaries	Regional airports and passengers.
Impact	• Expanding the geography of flights • Increase in number of flights • Increase in tourist flow • Decrease in price of air tickets • Creation of new jobs • Partnership between regions was established
Learnings	• Customer orientation as a competitive advantage • Maintain cooperation with local authorities and business • Enhance route flexibility
More info	https://azimuth.ru/en

Singapore: The Sustainable Air Hub Blueprint

Challenges	Currently, most of the carbon emissions from airport operations are produced by electricity consumption at the airport. Hence, key challenges include reducing energy use in airport terminals, using cleaner energy sources for airside vehicle fleets and enhancing air traffic management tools.
Initiative	Singapore's Sustainable Air Hub Blueprint, developed by the Civil Aviation Authority of Singapore (CAAS), was launched on Feb 2019. CAAS will work on rolling out a suite of initiatives across three domains – airline, airport and air traffic management to decarbonise Singapore's aviation sector while supporting its sustainable growth. CAAS will require flights departing Singapore to use sustainable aviation fuel from 2026. Passengers can expect to pay an additional levy on their air tickets. Singapore aims to reduce domestic aviation emissions from airport operations by 20% from 2019 levels by 2030. Singapore also aims to achieve net-zero domestic and international aviation emissions – inclusive of emissions from international flights operated by Singapore-based operators – by 2050. The intent is to install more solar photovoltaic systems on available rooftop spaces of airport buildings and have majority of electric vehicles within airside.
Actors	• Singapore's Ministry of Transport (MOT) • Civil Aviation Authority of Singapore (CAAS) • Changi Airport Group (CAG) • Other airport partners
Beneficiaries	Aviation is a key enabler for the global economy, hence businesses, people and the environment, will all benefit from the initiative driving sustainable growth.
Impact	These three initiatives are collectively expected to result in a 10%reduction in additional fuel burn and emissions, and bring Singapore closer to our targets in reducing domestic and international aviation emissions.
Learnings	Comprehensive stakeholder collaboration, early technological innovation and phased implementation are key to operationalising and achieving long-term targets.
More info	https://www.caas.gov.sg/docs/default-source/docs---so/singapore-sustainable-air-hub-blueprint.pdf

South Africa: Cape Town Air Access

Challenges	Connectivity, competitiveness, and economic growth
Initiative	The lead actor in the Cape Town Air Access were Western Cape and Tourism Trade and Investment. The steps taken in its implementation were: • Establishment of a Steering Committee consisting of multistakeholders and the private sector • Appointment of project team • Contribution of funding by each steering committee member • Developing business cases for new existing routes • Airline route support and development • Marketing and communications support for airlines • Policy and regulation advocacy • Hurdles experienced in the implementation included delays in approval of foreign operators permits and continuous advocacy around removal of regulatory barriers was employed.
Actors	• Provincial government • City of Cape Town • Airports Company South Africa • Cape Town Tourism • Private sector companies, and • Trade and Investment Promotion Agency
Beneficiaries	Tourism sector and the economy
Impact	• Cape town reached more than 3 million two-way passengers for the first time ever in 2024 • 16 new airlines and 18 routes to Cape Town since 2021 • Passengers to and from the continent have grown by 10% per year.
Learnings	• Collaboration is key • Success can also be attributed to funding contributions by each partner • Central point for airlines to communicate with is essential
More info	https://www.wesgro.co.za/air-access/home

United Arab Emirates: "Advocating for Open Skies" policy

Challenges	The protectionism regimes adopted by different countries within the G20
Initiative	The UAE's Open Skies Advocacy initiative aimed to liberalize air service agreements, boost global connectivity, and establish the country as a leading aviation hub by increasing direct routes, lowering fares, and improving airline access for smoother passenger movement. Led by the General Civil Aviation Authority (GCAA), the initiative involved Emirates, Etihad, flydubai, Air Arabia, and key aviation stakeholders. The Implementation Steps taken were: • Signed 160+ Air Service Agreements under Open Skies principles • Expanded Dubai, Abu Dhabi, and Sharjah airports • Supported UAE carriers in global network growth • Built a regulatory framework for safety and fair competition The challenges and solutions encountered were: • Foreign resistance: Addressed via diplomacy and economic reciprocity • Airport congestion: Solved with infrastructure expansion • Market balance: Maintained through regulatory oversight This initiative strengthened the UAE's position in global aviation and improved travel accessibility.
Actors	The UAE works hand in hand between the government and private sectors including Ministry of Economy, Ministry of Foreign Affairs. General Civil Aviation Authority, Ministry of Interior, Emirates Airline, Etihad Airways, Flydubai, Air Arabia, Wizz Air AD, Air Arabia AD, Abu Dhabi Airports, Dubai Airports, Sharjah Airports, RAK Airport, Fujairah Airport.
Beneficiaries	UAE Economy and its counterpart, travellers and tourists
Impact	Contribution of 92 US$ billion to UAE GDP
Learnings	• Economic & Tourism Growth: Open Skies boosted tourism, trade, and the UAE's position as a global aviation hub. • Airline & Infrastructure Expansion: Enabled UAE airlines to grow internationally and drove major airport investments. • Increased Competition & Connectivity: Lower fares, better service, and expanded routes.
More info	https://www.iata.org/en/iata-repository/publications/economic-reports/the-value-of-air-transport-to-the-united-arab-emirates/

Methodology

This report employs a mixed-methods approach combining quantitative data analysis, expert consultation, case study review to assess the role of air connectivity in seamless travel for tourism development across G20 and invited countries as well as a survey among G20 members and invited countries.

Data sources include UN Tourism statistics on international arrivals, ICAO's Air Connectivity Index, bilateral air service agreements from ICAO's WASA and DAGMAR databases, IATA market data, and the ATAG "Aviation: Benefits Beyond Borders" report. Additional information was drawn from national government portals and contributions submitted by G20 members and invited countries.

Key indicators analysed include international tourist arrivals by air, airline and airport infrastructure, flight frequency, seat capacity, and trends in passenger demand. The report also examines the regulatory environment, liberalization of market access, sustainability strategies, and multimodal integration efforts. Qualitative insights were incorporated through literature review, policy analysis, and contributions from institutions such as the African Development Bank and ICAO. While the scope is global, the primary focus is on G20 members and invited countries. Some figures reflect the most recent data available due to reporting lags, and air agreement mappings are limited to publicly accessible documents. The methodological focus is on policy relevance and comparability across countries.

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World Tourism Organization (UN Tourism)
Calle del Poeta Joan Maragall, 42
28020 Madrid, Spain

Tel.: (+34) 915 67 81 00
E-mail: info@unwto.org
Website: www.unwto.org

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The drafting was led by Ms. Zoritsa Urosevic, Executive Director, Ms. Sandra Carvão, Director, of the Market Intelligence, Policies and Competitiveness Department at UN Tourism and Mr. Kanan Aliev, Programme Officer.

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