



# Africa Tourism Monitor

*The High 5s – Tourism as a Pathway to Industrialization, Integration,  
Quality of Life, Agriculture, and Powering Up Africa*



**VOLUME 5 · ISSUE 1  
JULY 2018**



AFRICAN DEVELOPMENT BANK GROUP

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Photo credit: Uganda Tourism Board

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Photo credit: Gambia Tourism Board



# Foreword

The African Development Bank Group (AfDB) is delighted to present the 5<sup>th</sup> edition of *Africa Tourism Monitor*, which highlights travel and tourism as one of the fastest-growing and most interconnected sectors in the global economy. This year's theme centers on AfDB's High 5s, where we examine "Tourism as a Pathway to Industrialization, Integration, Quality of Life, Agriculture, and Powering Up Africa."

In 2015, under the leadership of Dr. Akinwumi Adesina, the newly elected President of the AfDB, the Bank outlined its commitment to five development priorities known as the "High 5s:"

1. Light Up and Power Africa;
2. Feed Africa;
3. Industrialize Africa;
4. Integrate Africa; and
5. Improve the Quality of Life for the People of Africa.

Under this agenda, the AfDB outlined a pathway for transformative

growth, innovation, and development for Africa's growing, youthful, diverse, and vibrant population. As you will see in the statistics and case studies presented throughout this publication, it is evident that tourism has the potential to be a vital contributor to Africa's development agenda.

This publication features the most recent data on tourism's catalyzing impact on global and African economies. In 2016, international tourism arrivals reached the highest levels to date with 1.239 billion arrivals, a 3.9% increase from 2015. According to the United Nations World Tourism Organization (UNWTO), global tourist arrivals are on pace to reach 1.322 billion in 2017, a 6.7% increase.

As global tourism increases year over year, we are delighted to report that Africa tourism is on the rise once again, after years in decline. In 2016, Africa's tourist arrivals increased to 62.9 million, up modestly from 62.5 million in 2015 (a 0.64% increase); this is a

5.1% share in worldwide tourism arrivals.

Morocco, South Africa, Tunisia, Egypt, and Zimbabwe led in tourism arrivals as the top five African destinations with over 2 to 10 million arrivals. In 2016, South Africa surpassed 10 million arrivals for the first time (with a 12.8% increase from 2015), joining Morocco for the first time.

In 2016, global tourism receipts totaled US\$ 1,225 billion. International tourism receipts in Africa totaled US\$ 36.2 billion in 2016, comprising 3% of global tourism receipts. However, this is a decrease of 7.7% from 2015.

Tourism significantly adds to employment gains on the continent, and also provides tremendous opportunities for skills development and advancement. Direct travel and tourism employment in Africa increased to 9.3 million (2.6% of total employment), with 6.8 million jobs in sub-Saharan Africa and 2.5 million jobs in North Africa in 2017. Globally,



tourism accounts for 3.8% of direct employment as a percentage of total employment, compared to 2.6% in Africa, 4.4% in North Africa, and 2.3% in sub-Saharan Africa.

In 2017, total tourism employment in Africa also experienced a steady rise, where travel and tourism jobs accounted for 6.5% of total employment of 22.8 million jobs (including direct, indirect, and induced employment); this includes 17.2 million jobs in sub-Saharan Africa, and 5.6 million jobs in North Africa.

Regional organizations such as the AfDB and the African Union Commission (AUC) have long called for greater regional integration and the free movement of persons across borders. This year, we celebrate the Single African Air Transport Market (SAATM). Signed by 23 African states as of January 2018, SAATM is “a flagship project of the African Union Agenda 2063, an initiative of the African Union to create a single unified air transport market in Africa, [utilizing]

the liberalization of civil aviation in Africa as an impetus to the continent’s economic integration agenda.” This marks the implementation of the 1999 Yamoussoukro Decision, which called for full liberalization of intra-African air transport services and greater market access. This will surely benefit Africa’s aviation sector and ancillary stakeholders for generations to come.

The goal of the *Africa Tourism Monitor* is to make a compelling case for Africa’s travel and tourism industry by providing statistics and real-world case studies on current and noteworthy topics in Africa tourism. We are extremely grateful for the participation of public and private sector industry leaders who make this publication a reality by sharing their insights with our readers.

This year, we acknowledge ongoing partners who have contributed to the publication year after year: Ethiopian Airlines, Euromonitor International, New

Partnership for Africa’s Development (NEPAD), UNWTO, W Hospitality Group, and many African Governments. And, we welcome new contributors to the publication: African Airlines Association (AFRAA), Airbnb, AirlinePros, Horwath HTL, Marriott International, Serena Hotels, and Voyages Afriq.

We hope that tourism will continue to have a catalyzing effect on Africa’s industrialization, integration, quality of life, agriculture, and power sector – advancing the “High 5s” for the socio-economic growth across our wonderful continent. ✨



**Dr. Charles Leyeka Lufumpa**

Director, Statistics Department, African Development Bank Group





## KEY TOURISM FACTS 2016

- Africa international tourism arrivals increased slightly to **62.9 million** in 2016 – a 0.64% increase.
- International tourism receipts in Africa totaled **US\$ 36.2 billion** in 2016, comprising 3% of global tourism receipts.
- Destinations with the strongest growth in international arrivals compared to 2015 were **Sierra Leone (+30,000, a 126% increase), Nigeria (+634,000, a 50.5% increase), Burundi (+56,000, a 42.7% increase), Eritrea (+28,000, a 24.6% increase), Togo (+65,000, a 23.8% increase), and Madagascar (+49,000, a 20% increase).**
- **South Africa** surpassed **10 million arrivals** for the first time, and **Morocco** sustained more than **10 million arrivals** for the fourth consecutive year.
- In 2016, Africa held a **5.1%** share in worldwide tourism arrivals, and a **3.0%** share of worldwide tourism receipts.
- In 2017, direct travel and tourism employment in Africa rose to **9.3 million (an 11.2% increase from 2016), with 2.5 million jobs in North Africa and 6.8 million jobs in sub-Saharan Africa.**

*\*Sources: United Nations World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC). Based on data available as of January 2018 for UNWTO, and as of March 2018 for WTTC.*

# Preface

Welcome to the 2018 edition of the *Africa Tourism Monitor*. The theme of this issue is “The High 5s – Tourism as a Pathway to Industrialization, Integration, Quality of Life, Agriculture, and Powering Up Africa,” where we examine a wide range of topics. These include subjects such as hotel pipeline developments and investments, balancing wildlife and urbanization, intra-Africa travel potentials with the Single African Air Transport Market (SAATM), attracting business and city tourism, creating innovative media strategies for African destinations, technology’s role in inclusive tourism growth, and much more.

The facts, figures, articles, and case studies in this issue illustrate how sustainable travel and tourism involve local populations and community stakeholders to engage and thrive in this dynamic sector in Africa.

We would like to thank all of our dedicated partners from government and the private sector who contributed their data, knowledge, and insights to produce this publication. Through collaborations such as these, we can highlight ways in which tourism and hospitality can boost socio-economic growth across the African continent. 🌍

**Yaw Nyarko**

Professor of Economics,  
Director of New York University  
Africa House



**Andrea Papitto**

MSc Tourism Management, Africa  
Tourism Development Consultant





# Africa Tourism: The Numbers



Global tourism sustained its growth once again in 2016, with 1.239 billion international arrivals, a 3.9% increase from 2015. According the UNWTO, global tourist arrivals are anticipated to reach 1.322 billion in 2017, at a 6.7% increase. Unlike recent years, Africa tourism is on the rise again – rebounding from global financial strains in source market countries, lingering effects of the Ebola crisis, and the Arab Spring uprisings.

In 2016, in Africa as a whole, tourist arrivals increased to 62.9 million, up from 62.5 million in 2015 (a 0.64% increase). Although this is seemingly modest, tourism in sub-Saharan Africa saw an 8.9% increase in international arrivals. Generally, the North African countries of Algeria, Morocco, Sudan, and Tunisia saw sustained growth at 5.0%, but the most drastic change in arrivals was seen by Egypt in 2016, which encountered a drop of 3.881 million tourist arrivals, a 42.5% decline from the previous year. However, Egypt's arrivals for 2017 have rebounded and will be closer to prior figures.

Accounting for tourism arrivals, Morocco, South Africa, Tunisia, Egypt, and Zimbabwe remain the top five African destinations. Notably in 2016, South Africa surpassed 10 million arrivals for the first time (with a 12.8% increase from 2015) and Morocco sustained more than 10 million arrivals for the fourth consecutive year. Aside from Egypt, each country in the top five saw an increase in arrivals.

In 2016, Africa held a 5.1% share in worldwide tourism arrivals, with Asia

and the Pacific comprising 24.7% of tourism arrivals and 4.1% in the Middle East. Global tourism receipts totaled US\$ 1,225 billion. International tourism receipts in Africa totaled US\$ 36.2 billion in 2016, comprising 3% of global tourism receipts. However, this is a decrease of 7.7% from 2015.

Destinations with the strongest growth in international arrivals compared to 2015 were Sierra Leone (+30,000, a 126% increase), Nigeria (+634,000, a 50.5% increase), Burundi (+56,000, a 42.7% increase), Eritrea (+28,000, a 24.6% increase), Togo (+65,000, a 23.8% increase), and Madagascar (+49,000, a 20% increase). 🌍

Millions of Visitors to Africa ↑



Top Five African Countries for International Tourist Arrivals in 2016 (millions)					
COUNTRY	2010	2013*	2014	2015	2016
Morocco	9.29	10.05	10.28	10.18	10.33
South Africa	8.07	9.54	9.55	8.9	10.04
Tunisia	7.83	6.27	7.16	5.36	5.72
Egypt	14.05	9.17	9.63	9.14	5.26
Zimbabwe	2.24	1.83	1.88	2.06	2.17

Note: This is based on data available as of January 2018, with not all countries reporting. In 2013, the country in Africa with the fifth highest tourist arrivals was Algeria with the top four the same as above.  
Source: United Nations World Tourism Organization: UNWTO World Tourism Barometer, Volume 16, Statistical Annex.

International Tourist Arrivals (2016)		
REGION	MILLIONS	% OF GLOBAL TOURIST ARRIVALS
Europe	619.3	50.0%
Asia and the Pacific	305.8	24.7%
North America	130.9	10.6%
Caribbean, Central America, South America	69.8	5.6%
<b>Africa</b>	<b>62.9</b>	<b>5.1%</b>
Middle East	50.3	4.1%
<b>World</b>	<b>1,239</b>	<b>100.0%</b>

Note: This is based on data available as of January 2018.  
Source: United Nations World Tourism Organization: UNWTO World Tourism Barometer, Volume 16, Statistical Annex.

Photo credit: Kenya Tourism Board



Photo credit: Mari Tada

## AFRICA TOURISM DATA PORTAL

The African Development Bank (AfDB) has developed the “Africa Tourism Data Portal,” a user-friendly tool dedicated to providing professionals with access to tourism-related data from a range of international and national sources. This portal is part of the AfDB’s “Africa Information Highway” initiative aimed at improving data collection, management, and dissemination in Africa. 🌍

[www.tourismdataforafrica.org](http://www.tourismdataforafrica.org)

# TOURISM'S CONTRIBUTION TO EMPLOYMENT



According to the World Travel and Tourism Council (WTTC) in 2017, travel and tourism accounted for 10.4% of total global GDP and more than 313 million jobs (including direct, indirect, and induced employment) at 9.9% of total employment globally.

Direct travel and tourism employment in Africa rose to 9.3 million (2.6% of total employment), with 6.8 million jobs in sub-Saharan Africa and 2.5 million jobs in North Africa in 2017. This is an 11.2% increase from 2016. Globally, tourism accounts for 3.8% of direct employment as a percentage of total employment, compared to 2.6% in Africa, 4.4% in North Africa, and 2.3% in sub-Saharan Africa.

Nigeria, Egypt, Morocco, and South Africa featured the highest direct tourism employment in 2017, ranging from 700,000 to 1.2 million jobs.

Similar to previous years, Seychelles, Cabo Verde, Mauritius, São Tomé and Príncipe, and The Gambia registered a strong performance for both direct tourism employment and direct, indirect, and induced employment.

In 2017, total tourism employment in Africa also experienced a steady rise, where travel and tourism jobs accounted for 6.5% of total employment or 22.8 million jobs (including direct, indirect, and induced employment); this breaks down to 17.2 million jobs in sub-Saharan Africa, and 5.6 million jobs in North Africa. ✨

## Direct employment in the tourism industry as a % of total employment (2017)

REGION/COUNTRY	% OF TOTAL EMPLOYMENT
World Average	3.8%
Africa	2.6%
North Africa	4.4%
Sub-Saharan Africa	2.3%
South Africa	4.5%
Rwanda	4.4%
Tunisia	6.3%

Source: World Travel and Tourism Council (WTTC), 2018.

## Top five African countries for direct tourism employment as a % of total employment (2017)

COUNTRY	% OF TOTAL EMPLOYMENT	TOTAL EMPLOYMENT
Seychelles	26.5%	12,500
Cabo Verde	15.8%	37,500
São Tomé and Príncipe	10.8%	6,650
Mauritius	7.2%	41,500
Morocco	7.1%	824,500

Source: World Travel and Tourism Council (WTTC), 2018.

## Top five African countries for total (direct, indirect, and induced) tourism employment as a % of total employment (2017)

COUNTRY	% OF TOTAL EMPLOYMENT	TOTAL EMPLOYMENT
Seychelles	66.0%	30,500
Cabo Verde	39.3%	93,500
São Tomé and Príncipe	23.6%	14,500
Mauritius	22.6%	131,000
Gambia	17.2%	107,500

Source: World Travel and Tourism Council (WTTC), 2018.

## Top ten African countries for direct employment in the tourism industry (2017)

COUNTRY	'000 JOBS
Nigeria	1,219.0
Egypt	1,099.0
Morocco	824.5
South Africa	726.5
Ethiopia	604.0
Tanzania	446.0
Kenya	429.5
Algeria	320.0
Ghana	307.5
Madagascar	287.5

Source: World Travel and Tourism Council (WTTC), 2018.

## Top ten African countries for total employment (direct, indirect, and induced) in the tourism industry (2017)

COUNTRY	'000 JOBS
Nigeria	3,316.0
Egypt	2,425.5
Morocco	1,902.0
Ethiopia	1,538.0
South Africa	1,530.5
Kenya	1,137.0
Tanzania	1,092.5
Madagascar	797.0
Mozambique	770.0
Ghana	682.0

Source: World Travel and Tourism Council (WTTC), 2018.

# Insights from Africa's Tourism

*"Governments across the continent are prioritizing tourism in their overarching development agendas, improving the business climate for tourism, and encouraging investment in infrastructure and hospitality. Africa is embracing nature and wildlife tourism, international brands and technological change, with social media and online booking on the rise. Crucially, the continent is also fostering cooperation in the name of sustainable tourism, especially through public-private partnerships."*



**Zurab Pololikashvili,**  
Secretary-General,  
United Nations World Tourism Organization (UNWTO)

*"The African Airlines Association (AFRAA) applauds the launch of the Single African Air Transport Market (SAATM), which has been championed by 23 African states in January 2018. The SAATM, a flagship project of the African Union (AU) Agenda 2063, is an initiative of the AU to create a single, unified air transport market in Africa, the liberalization of civil aviation in Africa, and is an impetus to the continent's economic integration agenda."*

**Abdérhmane Berthé,**  
Secretary General,  
African Airlines Association (AFRAA)



*"Africa boasts a rich and diverse cultural heritage, as well as natural assets in terms of landscapes, unique flora and fauna. Its heritage, if properly harnessed, should be able to position the continent as the preferred tourism destination. In addition, Africa remains one of the fastest-growing regions for the travel and tourism sector globally."*

**Dr. Ibrahim Assane Mayaki,**  
Chief Executive Officer,  
The NEPAD Planning and Coordinating Agency



*"Africa has much to offer to the world – from diverse cultural heritage and historic features, to the unique natural attractions that charm and amaze travelers from around the globe. Today, Africa is on the rise, inhabiting the newly emerging and fastest-growing economies, and the world's youngest population, which could serve as a springboard to a better future of the region."*

**Tewolde GebreMariam,**  
Chief Executive Officer,  
Ethiopian Airlines



*"We are seeing unprecedented traction for our compelling brands, driving our momentum of growth. We have always believed in the potential of Africa and the opportunities the continent has to offer. With economic growth, a rising middle class and rapid urbanization, the demand for travel and high-quality lodging is growing, providing us with a significant opportunity to enhance our footprint and play our part in supporting many emerging markets across the continent."*

**Alex Kyriakidis,**  
President and Managing Director Middle East and Africa,  
Marriott International



# Leaders and Policymakers

*"Tourism is the biggest foreign exchange earner in Rwanda, contributing over 20% of all foreign exchange. In 2017, Rwanda gained over \$400 million in tourism receipts, a number we expect to exceed this year. The Rwandan hospitality and services industry is thus the main beneficiary of this growth, and an important catalyst for consumption of agricultural and manufacturing products."*



**Honorable Clare Akamanzi,**  
Chief Executive Officer,  
Rwanda Development Board

*"Malawi has been ranked as #1 in Africa and #3 in the world as the best tourism destination and must not be missed in 2018 for several reasons. Malawi's people are warm-hearted; it is a secure country, where tourist safety is guaranteed; and tourism logistics to our main destinations are reliable and well-coordinated through trained tour operators and guides. Malawi boasts fresh waters, like the magnificent Lake Malawi, and many game reserves featuring the Big 5. Tourism is a priority sector for Malawi because it contributes to both the social and economic development of our country. It generates foreign currency and creates employment opportunities in hospitality, logistics, and tour industries."*

**Honorable Henry Mussa, M.P.,**  
Minister of Industry, Trade, and Tourism,  
Republic of Malawi



*"We are increasingly living in a world in which tourism is acting as a catalyst for change. As it continues to grow in stature as one of the most important industries driving the global economy, we can see the ripple effect on the industry which supplies so many of the services that tourists rely on during the course of their holidays as they interact with different sectors. There exists an inextricable link between the two that must continue to evolve in a mutually-enforcing fashion."*



**Ambassador Maurice Loustau-Lalanne,**  
Minister for Tourism, Civil Aviation, Ports and Marine,  
Republic of Seychelles

*"Cameroon is a country naturally blessed with tremendous tourism potentials. Every natural attraction in the continent of Africa is found in our country Cameroon. This is why we say Cameroon is "Africa in Miniature" or "All of Africa in One Country." The importance of tourism to the Cameroonian economy cannot be underestimated because the tourism industry is one of the main sources of national income and foreign exchange earnings for our country. Our government is determined to develop tourism in all ten regions of the country and improve the performance of the tourism industry."*

**Honorable Bello Bouba Maigari,**  
Minister of Tourism and Leisure,  
Republic of Cameroon



*"With a current portfolio of 24 properties in Africa, Serena Hotels was founded with the strategy that very few locations are unsuitable for tourism activities and that it is often possible to combine developmental objectives with real economic sustainability and profitability for multiple stakeholders and destinations. We strive to bring best practices in social, cultural, environmental, and economic development to some of the most deprived, remote and yet alluring, but most fragile areas in the world."*

**Mahmud Jan Mohamed,**  
Managing Director, TPS Serena Hotels, Africa Tourism Promotion Services (TPS), Serena Hotels



# Insights from Africa's Tourism Leaders and Policymakers

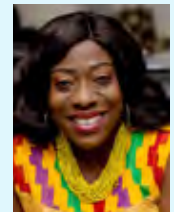
*"To support the sustenance of the tourism industry, the Zimbabwe government commits itself to offering tourism investment incentives such as duty exemptions and rebates on capital goods for tourism development zones, as well as the provision of the tourism fund. With these developments, we appeal to the international market to consider Zimbabwe as your next destination for investment and tourism business. We need you more than ever and we hope that you will be part of the transition, as we strive to reposition Zimbabwe to the glory of yester-years. Together, we can make Zimbabwe the favorable destination to visit, a destination of choice, and, above all, a favorable economic playing field for all."*

**Honorable Priscah Mupfumira,**  
Minister of Tourism and Hospitality Industry,  
Republic of Zimbabwe



*"Ghana is like no other country in terms of nature, history, and culture. Ghana offers a unique cultural heritage, featuring a calendar of festivals in ancient traditions, and a tropical rainforest with beaches and sanctuaries for unique birds, butterflies, and monkeys. Ghana boasts many of Africa's ancient slave forts and castles built by eight different European empires. Ghana is an oasis of peace and security. Tourism in Ghana has come of age and we are incredibly optimistic about the growth of the sector."*

**Honorable Catherine Abelema Afeku, M.P.,**  
Minister for Tourism, Arts, and Culture,  
Republic of Ghana



*"Sub-Saharan Africa is seen as one of the most promising emerging markets worldwide. The African continent has recently become a new ground of opportunities whereas it was rejected by most hoteliers during the previous decade."*

**Philippe Doizelet,**  
Managing Partner,  
Horwath HTL



*"Located in West Africa, Togo is a modestly small country and yet has a lot to offer visitors thanks to its range of sceneries and the variety and vibrancy of cultural traditions. I am inviting you to Togo, a country with human face for an excellent stay, in friendship and conviviality."*

**Honorable Yaovi Attigbé Ihou,**  
Ministry of Industry and Tourism,  
Togolese Republic

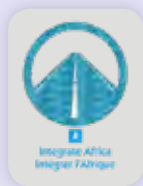


*"Illegal wildlife trade and regional conflict has contributed to a rapid loss of wildlife and endangered the survival of many species in Africa. As such, elephant and rhino populations have been depleted because of ivory, and rhino horn international trade. A new development paradigm is necessary to strengthen the global partnerships, regulations, and public consciousness to address these challenges to the benefit of communities and Africa's tourism industry."*

**Honorable Professor Ephraim Kamuntu,**  
Minister of Tourism, Wildlife, and Antiquities,  
Republic of Uganda



# Harnessing Africa's Engine of Growth: The Role of NEPAD's Tourism Action Plan



Tourism is a dynamic sector, which has been dubbed a “sunrise” sector that can rapidly switch on for inclusive socio-economic growth. It also cuts across societal challenges and upheavals. The African Union (AU) Agenda 2063 and the 2030 United Nations (UN) Agenda for Sustainable Development took special recognition

of tourism as one of the engines of inclusive growth and development, including positive impacts on job creation, environmental preservation, and effective resource management.

Despite increases and unpredictable shocks from global terrorism and political instability, health pandemics, and natural disasters, travel and tourism continue to grow. Africa boasts a rich and diverse cultural heritage, as well as natural assets in terms of

landscapes, unique flora and fauna. Its heritage, if properly harnessed, should be able to position the continent as the preferred tourism destination. In addition, Africa remains one of the fastest-growing regions for the travel and tourism sector globally. For instance, in 2016, international tourist arrivals grew by 8% with a total of 62 million international tourists, according to the United Nations World Tourism Organization (UNWTO). The recent socio-economic impact of tourism in Africa is summarized as follows:

- According to the World Travel and Tourism Council (WTTC, 2018), the continent's total foreign receipts in 2017 amounted to US\$ 177.6 billion, contributing 8.1% of total Gross Domestic Product (GDP).
- In the employment sector, the tourism sector directly supported about

9.3 million jobs, which is 2.6% of total employment in the continent in 2017 (WTTC, 2018); this is equivalent to 1 in 11 jobs in the continent's economy. Africa's aviation industry alone supports 6.9 million jobs and contributes US\$ 80 billion to GDP on the continent.

- In 2017, Africa's share of investment in travel and tourism was US\$ 28.2 billion, or 5.7% of total investment in the continent (WTTC, 2018).

More so, a comparative analysis of tourism contribution to Africa's GDP with other sectors shows that the importance of sustainable tourism cannot be over-emphasized. For example, agriculture used to be the heartbeat of the continent. But, its trickle-down effects are becoming bearish. According to the World Bank national accounts data, and Organisation for Economic Co-operation and Development



(OECD) national accounts data of 2017, the decline in agriculture production, export and crash in the prices of agriculture products, mainly primary commodity, has seen the value added net output of the agriculture sector decreasing. The GDP contribution in forestry, hunting, and fishing, as well as cultivation of crops and livestock production from 2007 to 2016 in sub-Saharan Africa has been on the decline. In 2007, agriculture contribution was about 20% and rose to 21.3% two years later. Since 2010, the contribution of agriculture to the continent's GDP dwindled to about 18% in 2016.

In contrast, from 2007 to 2016, tourism's contribution to the continent's GDP has been in the upward trend, with growth of around 4.5% per year. In 2017, tourism's contribution

rose to 8.1% of total GDP (WTTC, 2018).

With growing unemployment in Africa, especially amongst the youth, tourism has the ability to accommodate a wide range of job opportunities from technical to soft, to unskilled, rural, semi-urban, and urban. Therefore, it is pertinent to enhance the existing policies and frameworks, to leverage its diverse natural capital and cultural heritage. The UNWTO 2016 report predicts that tourism arrivals in Africa will reach 134 million by 2030, from the present-day level of 62 million. This significant expansion could significantly contribute to the GDP, job creation, and transformation of African countries and the continent at large. However, for this projection to become a reality for the

continent, there is need for a conducive environment that would facilitate infrastructure development, investment in human capacity development, and growth in the African market, to promote sustainable tourism, and regional integration.

From the creation of the Organization of African Unity (OAU) to the NEPAD, Africa's regional integration agenda for the economic transformation of the continent has been on the cards, with emphasis on the ideals of regionalism and corridor approach. The continent's programmatic intervention in the tourism sector is implemented through the NEPAD Tourism Action Plan (TAP) – a framework to foster sustainable tourism on the continent. The





NEPAD's TAP was developed under the guidance of African ministers of tourism, who meet annually under the UNWTO Commission for Africa (CAF) and was adopted at the third General Assembly of the African Union in July 2004, in Addis Ababa, Ethiopia.

Cognizant that tourism is one of the Africa's engines of growth and development, during the recent African Union Assembly in January 2018, Africa's heads of state and government appreciated the efforts and contributions of the NEPAD Agency and its partners, through the implementation of the NEPAD TAP. The AU further requested the NEPAD Agency and its partners to update the action plan to address the contemporary industry.

In response to the decision of the heads of state, the updated TAP will seek to link the implementation of relevant regional frameworks and programs, to optimize visibility of the tourism sector, as well as to enhance the growth of the sector. These frameworks include: the 2012 adoption of a Framework, Roadmap, and Architecture for fast-tracking the establishment of the Continental Free Trade Area (CFTA); action plan for Boosting Intra-African Trade (BIAT); and a Program for Infrastructure Development in Africa (PIDA). On one hand, it will aim to encourage state-business relationships, through

public-private partnerships and to dovetail the operationalization and domestication of the Open Skies for Africa, the African Common Passport, the AU Agenda 2063, and the UN Sustainable Development Goals (SDGs), on the other hand. 🌟

**Dr. Ibrahim Assane Mayaki,**  
Chief Executive Officer,  
The NEPAD Planning and  
Coordinating Agency



# Sustainable Tourism for



On behalf of the United Nations World Tourism Organization (UNWTO), it is my great pleasure to contribute to the 5<sup>th</sup> *Africa Tourism Monitor*. I express my appreciation to the African Development Bank (AfDB) for this publication, which continues to raise awareness amongst global stakeholders of the potential of tourism in Africa as a tool of economic transformation.



2017 was a year of immense growth for African tourism. International tourist arrivals were up around 8% on 2016, as around 62 million people crossed borders for tourism purposes, making the sector more important than ever for African economies and societies.

Governments across the continent are prioritizing tourism in their overarching development agendas, improving the business climate for tourism, and encouraging investment in infrastructure and hospitality. Africa is embracing nature and wildlife tourism, international brands and technological change, with social media and online booking on the rise. Crucially, the continent is also fostering cooperation in the name of sustainable tourism, especially through public-private partnerships.

During the 2017 celebrations of the International Year of Sustainable Tourism for Development, UNWTO and the Government of Zambia organized a conference promoting sustainable tourism as an important tool for inclusive growth and community engagement that helps to achieve the seventeen SDGs and generates benefits for African societies.

The conference made very clear the substantial increase in investment needed in sustainable tourism development in Africa, in order for tourism to reach its potential to contribute to achieving the SDGs across the continent. The Lusaka Declaration that was adopted at the conference further emphasizes the key role of sustainable tourism to reduce poverty, act as a driver for change, and to further engage all stakeholders to implement policies and strategies to give a prominent role of sustainable tourism in their political and economic agendas. The global donor community, investors, and financial institutions have an opportunity to follow

the shift towards tourism in government policy and priorities, and invest in the sector's potential.

Targeted investments in infrastructure and connectivity, combined with sustainable tourism management, can also ensure that African tourism makes the best use of its resplendent natural and cultural assets, while helping to safeguard environments and communities for future generations and ensuring local community participation along the entire value chain.

Many African destinations face challenges in preserving their biodiversity and environment, which may affect visitors' satisfaction and ultimately result in smaller revenues from tourist-related activities, beside the impact on natural resources. In these destinations, it is critical to raise awareness among the local population on the importance of biodiversity conservation, and how to address environmental issues while undertaking tourism activities.

Furthermore, regional and multi-stakeholder cooperation is essential to addressing key labor-related challenges: building capacity for human capital development, improving gender equality at work, providing opportunities for youth, supporting



# Development in Africa

innovation and the private sector through small and medium-sized enterprises (SMEs), and responding to global changes driven by technology and collaborative business models.

UNWTO collaborates closely with the African Union (AU) to advocate on the role of sustainable tourism in Africa and its positioning on the AU Agenda 2063. The launch of the Single African Air Transport Market (SAATM) earlier this year is a milestone achieved toward Open Skies policies and the implementation of the 1999 Yamoussoukro Decision. Twenty-three African countries have adhered to the SAATM and it will be necessary for more countries to join.

Air transport is key to tourism development and we have identified it as one of our priority areas for UNWTO's agenda for Africa for the coming years. This agenda will be discussed this year with African tourism ministers on the occasion of the 61st UNWTO Regional Commission for Africa and "Tourism Statistics: A Catalyst for Development"

seminar, to be held in Abuja, Nigeria in June 2018. The seminar will provide the opportunity to highlight the relevance of tourism statistics, which enable countries to measure and to efficiently manage the sector in view of developing sound marketing tourism strategies.

The advances made in technology, innovation, and human capital development can be incorporated into the sustainable tourism plans and practices of all stakeholders towards positioning a strong "African Tourism Brand" that will address the perception issues that many African countries face. This is a huge opportunity for Africa to capitalize on new technologies to share positive stories, encourage new start-ups, and develop tourism initiatives at grassroots levels around the continent.

With each of these issues addressed, tourism can be a true driver for African nations as they strive to reach the 2030 Sustainable Development Agenda. UNWTO projects that Africa's international tourist arrivals will reach 134 million in 2030. Africa's tourism potential is undeniable, and I see a very bright future for tourism across the continent if we all work together to make tourism a pillar of development in Africa. 🌍

**Zurab Pololikashvili,**

Secretary-General,  
United Nations World Tourism Organization  
(UNWTO)

<http://africa.unwto.org>



# Marriott International



Marriott International is the leading international hotel operator in Africa and Indian Ocean, currently operating more than 135 hotels with close to 24,000 rooms across 12 lifestyle brands, including: JW Marriott, Luxury Collection, St. Regis, The Ritz Carlton, Four Points by Sheraton, Le Meridien, Marriott Executive Apartments, Marriott Hotels, Protea Hotels by Marriott, Renaissance Hotels, Sheraton, and Westin.

With a legacy that dates back to over 4 decades of operating hotels in Africa, today Marriott International is present in 20 countries on the continent, including: Algeria, Djibouti, Egypt, Ethiopia, Gabon, Ghana, Guinea, Kenya, Malawi, Mauritius, Morocco, Namibia, Nigeria, Rwanda, Seychelles, South Africa, Tanzania, Tunisia, Uganda, and Zambia. While strengthening our footprint in existing countries, we are gearing up to foray into new countries like Benin, Botswana, Ivory Coast, Mali, Mauritania, and Senegal. We will also debut new brands, including: AC Hotels by Marriott, Aloft, Auto-graph Collection, Courtyard by

Marriott, Element, Residence Inn by Marriott, and W Hotels into Africa.

Africa makes a very compelling story for us. Marriott International was the first global chain to make a significant investment in the continent with the acquisition of Protea Hotels in 2014. This was a significant milestone in the history of Marriott International in the region. The acquisition turbocharged Marriott International's presence on the continent and bolstered the company into emerging as the largest international operator in Africa.

We are seeing unprecedented traction for our compelling brands, driving our momentum of growth. We have always believed in Africa's potentials, and the opportunities the continent has to offer. With economic growth, a rising middle class, and rapid urbanization, the demand for travel and high-quality lodging is growing, providing us with a significant opportunity to enhance our footprint and play our part in supporting many emerging markets across the continent.

The hotel market in Africa is still under-represented with under-capacity in most cities. As an international hotel operator, Marriott International has brought quality lodging into the continent. Our compelling lifestyle brands resonate with the aspirational and fast growing middle class. African economies have sustained unprecedented rates of growth, driven mainly



# Bets Big on Africa

by strong domestic demand, improved macroeconomic management, and increased political stability. This is coupled with the continent's emerging and rapidly growing middle class, a young demographic, and increased connectivity with the rest of the world, all of which reinforce the enormous opportunities that exist on the continent.

Pan-African integration has given an impetus to regional travel driven inbound tourism, while increased foreign investments and improved infrastructure in some countries is driving business travel. The continent's vast, diverse, and rich natural endowments make it an attractive destination for the leisure traveler from around the world to explore.

Our portfolio and distribution in the market and the combined power of our brands underpinned by our award-winning loyalty programs, gives us a competitive edge. Africa is a continent of opportunities with untapped potentials that are core to our strategy. As a company, we have invested more than US\$ 13 billion globally on the Starwood acquisition. We now have the world's best portfolio of brands, the most comprehensive global footprint, and the most extensive loyalty programs, providing an unparalleled guest experience, which makes us much more attractive to investors across the region, more than ever before.

Signings and openings form the cornerstone of our aggressive growth strategy. Our history and legacy on the continent and the strong foundations we have built over the years serve as a springboard for our future growth. Our brands are resonating with the aspirational and fast-growing middle class in the region.

Today, we have a robust and rapidly growing pipeline and are confident of reaching our target of over 200 hotels with 37,000 rooms open or in the pipeline by 2026, reinforcing our continued commitment to expansion in Africa and solidifying our leadership on the continent. Our aggressive growth plans are expected to generate substantial economic activity and around 50,000 direct and indirect jobs once the hotels open. We are committed to Africa, and, in fact, are betting big on it. 🍀

**Alex Kyriakidis,**

President and Managing Director  
Middle East and Africa,  
Marriott International

[www.marriott.com](http://www.marriott.com)

**Marriott**  
INTERNATIONAL

# HOSPITALITY'S ROLE IN IMPROVING



Tourism promotion services, trading under the brand name Serena Hotels, pioneered a new form of tourism over 40 years ago. The company, with a current portfolio of 24 properties in Africa, was founded with the strategy that very few locations are unsuitable for tourism activities and that it is often possible to combine developmental objectives with real economic sustainability and profitability for multiple stakeholders and destinations. We strive to bring best practices in social, cultural, environmental, and economic development to some of the most deprived, remote, and yet alluring, but

most fragile areas in the world. Serena Hotels focuses on programs that respond to the needs of the environment, economy, society/communities, and aligns its programs towards achieving the SDGs set out by the United Nations Development Programme (UNDP).

## RESPONSIBLE BUSINESS

Responsible business and the broad spectrum of its eco-practices exist in Serena's activities along the value chain to create shared value between our business and the communities/eco-system in which we operate.

Serena Hotels gives priority to the local communities living around our areas of operation to ensure economic independence with the end goal to better navigate uncertainty and thrive towards a sustainable livelihood in the future. Our properties focus on providing opportunity to the local community through: purchasing fresh food stuff, selling artifacts and handicrafts in our gift shops, engaging local performers for theatrical displays, and skills development and employment through work-training opportunities that allow the youth to gain marketable skills leading to meaningful work. Other support initiatives include provision of free medical consultation, health outreach programs, and support through a broad range of charitable/community programs.



SERENA TREE PLANTING INITIATIVES UNDER THE ADOPT A SCHOOL PROGRAM

Serena's significant achievement in the recent past has been to assist in reducing the gender entrepreneurial gap by not only training and creating employment, but enhancing access to sustainable markets for vulnerable small-scale women farmers under a "fair trade tourism certificate" with the end objective of reducing poverty and enhancing quality of life. Serena's support towards 2 HIV+ women farmer groups (comprised of 50 women) based at the Amboseli National Park has resulted in purchases of over \$40,000 in 2 years. Our support has benefitted their household (250 individuals), and allowed them to purchase and operate on 2 acres of land.

Serena works with over 24 schools around its properties to ensure that children have a conducive environment for learning. This is achieved through a number of initiatives that influence positive attributes on a child, thus having a holistic positive impact on a child's upbringing and development that will, hopefully, in the medium to long-term assist



TURTLE HATCHLING AT THE SERENA BEACH RESORT & SPA



# QUALITY OF LIFE: SERENA HOTELS

to gradually transform the quality of life for generations to come.

## RECRUITMENT, TRAINING, AND DEVELOPMENT

Substantial resources are invested in local community employment, staff, and management training, development, and welfare programs. Thus, the provision of rewarding careers, personal growth, quality training, and exposure towards advanced leadership roles, as well as capacity-building, remains a strategic priority for Serena Hotels.

## PROTECTING A FRAGILE ECOSYSTEM

Responsible management of natural resources in our operations has been core of our business since the construction of our first hotel. Our actions are focused on programs related to climate change; water, and energy conservation; reducing and recycling waste to the extent possible; conserving biodiversity; restoring natural habitats; and respecting local tradition, culture, and heritage.

On the tree planting front, our major success stories have been in the Hombe Forest in the Mount Kenya National Park, a United Nations Educational, Scientific, and Cultural Organization (UNESCO) World Heritage Site, and at Amboseli National Park, where the deforestation is being reversed. Over the last decade, over 10 million trees have been planted through companies' various re-afforestation programs.

We have been working for over 20 years to protect sea turtles and have released about 45,000 hatchlings into the

sea. One of the successes has been to turn individuals/fishermen, who may have previously been poachers of turtles and their eggs, into their protectors through monetary incentives. We have built a butterfly conservation sanctuary, and, to date, 65 species are bred and over 275,000 butterflies have been released in the last 14 years.

Being the hospitality pioneers within "destination East Africa," Serena Hotels' sustainable development agenda continues to inspire various stakeholders to take a wider consideration encompassing a long-term view when making business decisions. We are proud to have been able to play a leading role in the growth and development of the East African region. 🌸

**Mahmud Jan Mohamed,**

Managing Director, TPS Serena Hotels, Africa  
Tourism Promotion Services (TPS), Serena Hotels

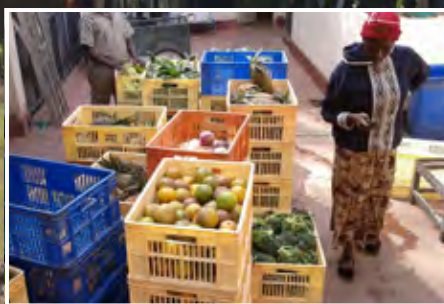


**SERENA HOTELS**

SAFARI LODGES AND CAMPS  
HOTELS • RESORTS

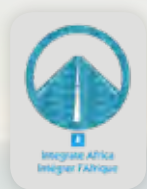


SERENA HOTELS' READING FOR CHILDREN PROGRAM



SERENA KIMANA'S PRODUCE OFFLOADED AT THE HOTEL

# Hotel Chain Development Pipelines in Africa 2017



Here, I am pleased to present a summary of the 9th edition of W Hospitality Group's annual survey of the hotel chains' development activity in Africa. We first produced the survey in 2009, with contributions from 19 international and regional hotel chains, which reported between them, a pipeline of almost 30,000 rooms in 144 hotels. In this 2017 study, we are reporting on 36 international and regional contributors, with a total of over 73,000 rooms in 417 hotels as shown in Table 1 below. That is an increase of 13 percent from the 2016 pipeline, continuing the year-to-year rise as the contributing hotel chains increase their pipelines, and also, as we gather responses from more chains such as aha Hotel and Lodges, Pefaco, and Sarovar.

**Table 1: Hotel Chain Development Pipelines in Africa 2017 – Regional Summary**

	2013		2014		2015		2016		2017	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	73	18,065	73	16,449	79	18,565	87	19,971	107	23,836
Sub-Saharan Africa	115	18,191	142	23,283	191	31,150	278	44,260	310	48,980
<b>TOTAL</b>	<b>188</b>	<b>36,256</b>	<b>215</b>	<b>39,732</b>	<b>270</b>	<b>49,715</b>	<b>365</b>	<b>64,231</b>	<b>417</b>	<b>72,816</b>







Photo credit: Marriott International



Photo credit: Kenya Tourism Board



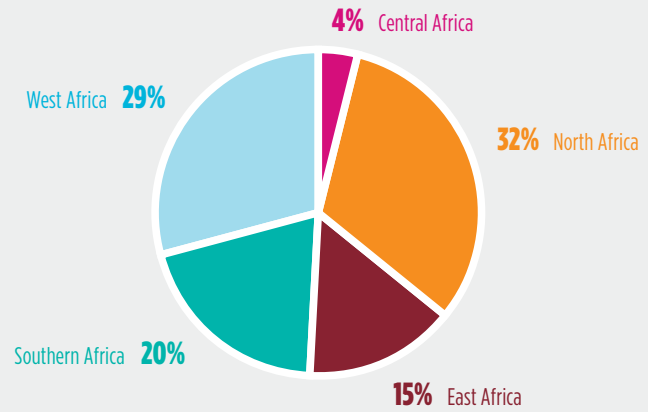
Photo credit: Serena Hotels



Photo credit: Horwath HTL

As in previous years, North Africa continues to take the lead as the region with the largest number of investments in the pipeline, but is closely followed by West Africa. It should be noted that the average size of hotels in North Africa tends to be much higher than those in sub-Saharan Africa.

**CHART 1. HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA 2017 - REGIONAL BREAKDOWN (ROOMS)**



Many African countries had a challenging 2016, with lower prices for oil, and other commodities, devalued currencies, and other negative factors. That affected confidence in the short-term, and the number of deals signed was only 86, down from 121 in 2015. But, despite the slowdown, some countries benefited from cheaper oil imports and there was increased activity in Southern and East Africa. In addition, more hotel chains established development offices on the continent to address the fact that Africa is still massively under-provided with rooms.

Whilst we had expected growth in 2017 to be somewhat muted, with the economy still struggling in countries such as Nigeria and Angola (both heavily reliant on oil, and both in recession in 2016 and early 2017), initial figures from our 2018 survey indicate that there was growth in the number of rooms in the pipeline of over 13 percent. In addition, an increasing number of deals are coming to fruition on time – from only 26 percent opening their doors on schedule in 2014, to 47 percent in 2016.

At the same time, investor confidence is returning to North Africa after several years of turmoil and uncertainty in countries such as Egypt and Tunisia. As shown in Table 2, when the pipeline is analyzed according to the top ten countries by number of rooms, four of the five North African countries are there, with several deals signed in 2016, including 12 in Egypt.

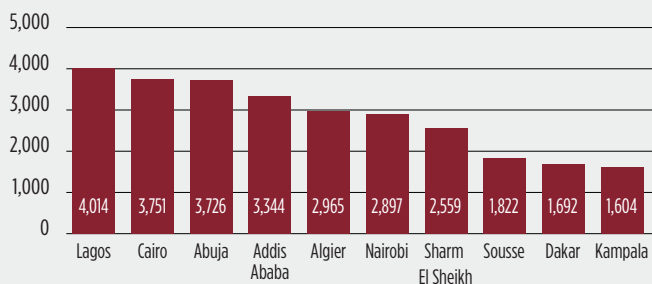
**Table 2: Hotel Chain Development Pipelines in Africa 2017 – Top ten countries by number of rooms**

Rank	Country	Hotels	Rooms	Average size
1	Nigeria	61	10,313	169
2	Egypt	35	9,851	281
3	Angola	54	6,939	129
4	Morocco	34	5,271	155
5	South Africa	33	4,484	136
6	Tunisia	17	3,852	227
7	Ethiopia	20	3,819	191
8	Algeria	17	3,771	222
9	Cape Verde	11	3,478	316
10	Kenya	19	3,453	182

As in 2016, and for several past years, Nigeria has the most rooms in the development pipeline. Around 40 per cent of the deals in Nigeria were signed between 2009 and 2014, but a significant proportion has still not progressed to on-site construction.

Lagos continues to lead the top ten. Sousse (Tunisia) and Kampala are two new entrants into this year's top ten cities, while Sharm el Sheikh moves from third place to seventh place, as only one new deal was signed there in 2016.

**CHART 2. HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA 2017 – TOP TEN CITIES BY NUMBER OF PLANNED ROOMS**



Looking at the development activity of the hotel chains (Table 3), Marriott International, boosted by its merger with Starwood, moves from third place in 2016 to top of the table, by far, in 2017. The number of planned rooms in Marriott's pipeline rose 21.9 percent, from 13,448 rooms in 2016 (which figure includes Starwood, then independent) to 16,393 rooms in 2017.

**Table 3: Hotel Chain Development Pipelines in Africa 2017 – Top ten chains by number of planned rooms**

Rank	Rank by rooms		Change on 2016	Average size (rooms)
	Hotel Chains	Rooms		
1	Marriott International	16,393	21.9%	198
2	AccorHotels	13,286	51.1%	158
3	Hilton	9,098	7.0%	222
4	Carlson Rezidor Hotel Group	7,862	7.1%	202
5	Meliá Hotels International	2,437	213.6%	271
6	Deutsche Hospitality	2,340	158.6%	390
7	Best Western Hotels & Resorts	1,652	26.0%	92
8	Intercontinental Hotel Group	1,632	56.3%	233
9	Hyatt International	1,564	47.4%	196
10	Mangalis Hotel Group	1,349	-42.1%	135



Photo credit: Marriott International



Photo credit: Horwath HTL



Photo credit: Horwath HTL

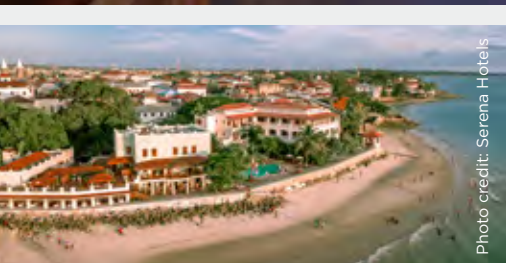


Photo credit: Serena Hotels



Photo credit: Marriott International

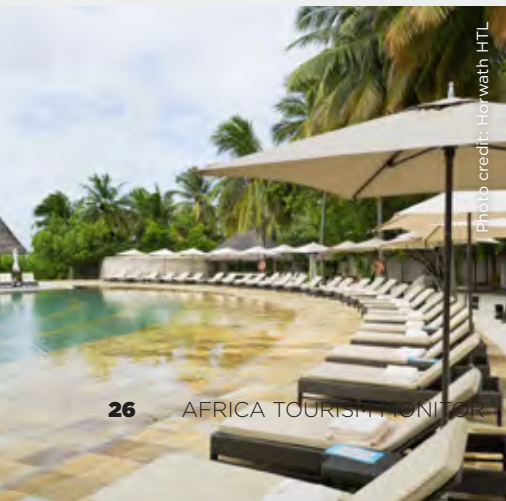


Photo credit: Horwath HTL

The top ten brands by number of hotels and rooms in their pipelines are shown in Table 4.

**Table 4. Hotel Chain Development Pipelines in Africa 2017**  
**Top ten brands by number of planned hotels and rooms**

Rank by Hotels				Rank by Rooms			Change on 2016	Average Size (Rooms)
Rank	Brand	Hotels	Rooms	Rank	Brand	Rooms		
1	ibis Styles	26	3,642	1	Hilton	5,697	17%	228
2	Radisson Blu	24	5,373	2	Radisson Blu	5,373	-6%	224
3	Grand Mercure	23	2,350	3	ibis Styles	3,642	-5%	140
4	Hilton	21	5,697	4	Marriott	3,005	3%	200
5	Marriott	15	3,005	5	Meliã Hotels & Resorts	2,437	214%	271
6=	Hilton Garden Inn	13	2,147	6	Grand Mercure	2,350	5%	102
6=	Mantis	13	537	7	Four Points by Sheraton	2,189	22%	182
8=	Park Inn by Radisson	12	1,701	8	Hilton Garden Inn	2,147	-16%	165
8=	Four Points by Sheraton	12	2,189	9	JW Marriott	1,877	40%	313
10	Meliã Hotels & Resorts	9	2,437	10	Fairmont	1,788	27%	255

By number of hotels, ibis Styles, an Accor brand, is ranked number one, displacing Carlson Rezidor's Radisson Blu, which has continued to compete with ibis Styles and the Hilton for many years. Mercure, another AccorHotels brand, has displaced Hilton this year taking the third position in 2017. However, the average size of a hotel for a Radisson Blu or Hilton brand, much larger than ibis and Mercure, ensures that they retain top slots in terms of number of rooms, the ultimate measure of future income potential.

Hilton occupies the first place ranking by number of rooms, with 5,697 rooms in their pipeline representing a 16 percent increase from 2016. The ibis Styles and



Photo credit: Serena Hotels

Radisson Blu brands experienced a 5 and 6 percent decrease respectively compared to 2016. Whilst they have only 9 hotels in the pipeline, Meliã Hotels & Resorts has a dramatic 200 percent increase in the number of planned rooms from 2016, with some very large hotels.

Nigeria has the most hotels and rooms in the development pipeline, but Egypt has the most rooms under construction, with 7,355 rooms, almost 75 percent of the country total on-site, and therefore (almost) certain to open.

As shown in Table 5, even though South Africa has a larger pipeline than several other countries in the top ten, only 28 percent of its total rooms are under construction. The number of planned rooms in Angola decreased from 7,560 rooms in 56 hotels in 2016 to 6,939 rooms in 54 hotels, due in part to the 2016 opening of 3 of AccorHotels' 50-hotel deal.

**Table 5. Hotel Chain Development Pipelines in Africa 2017**  
**Top ten countries by pipeline status**

Rank	Country	Hotels	Rooms			Rank – All Deals
			Total	On-site Construction		
1	Egypt	35	9,851	7,355	75%	2↑
2	Nigeria	61	10,313	4,296	42%	1↓
3	Morocco	34	5,271	3,660	69%	4↑
4	Tunisia	17	3,852	3,204	83%	6↑
5	Kenya	19	3,453	3,073	89%	10↑
6	Angola	54	6,939	3,060	44%	7↑
7	Ethiopia	20	3,819	2,782	73%	8↑
8	Algeria	17	3,771	2,717	72%	3↓
9	Cape Verde	11	3,478	1,337	38%	9↔
10	South Africa	33	4,484	1,263	28%	5↑



Photo credit: Serena Hotels



Photo credit: Horwath HTL

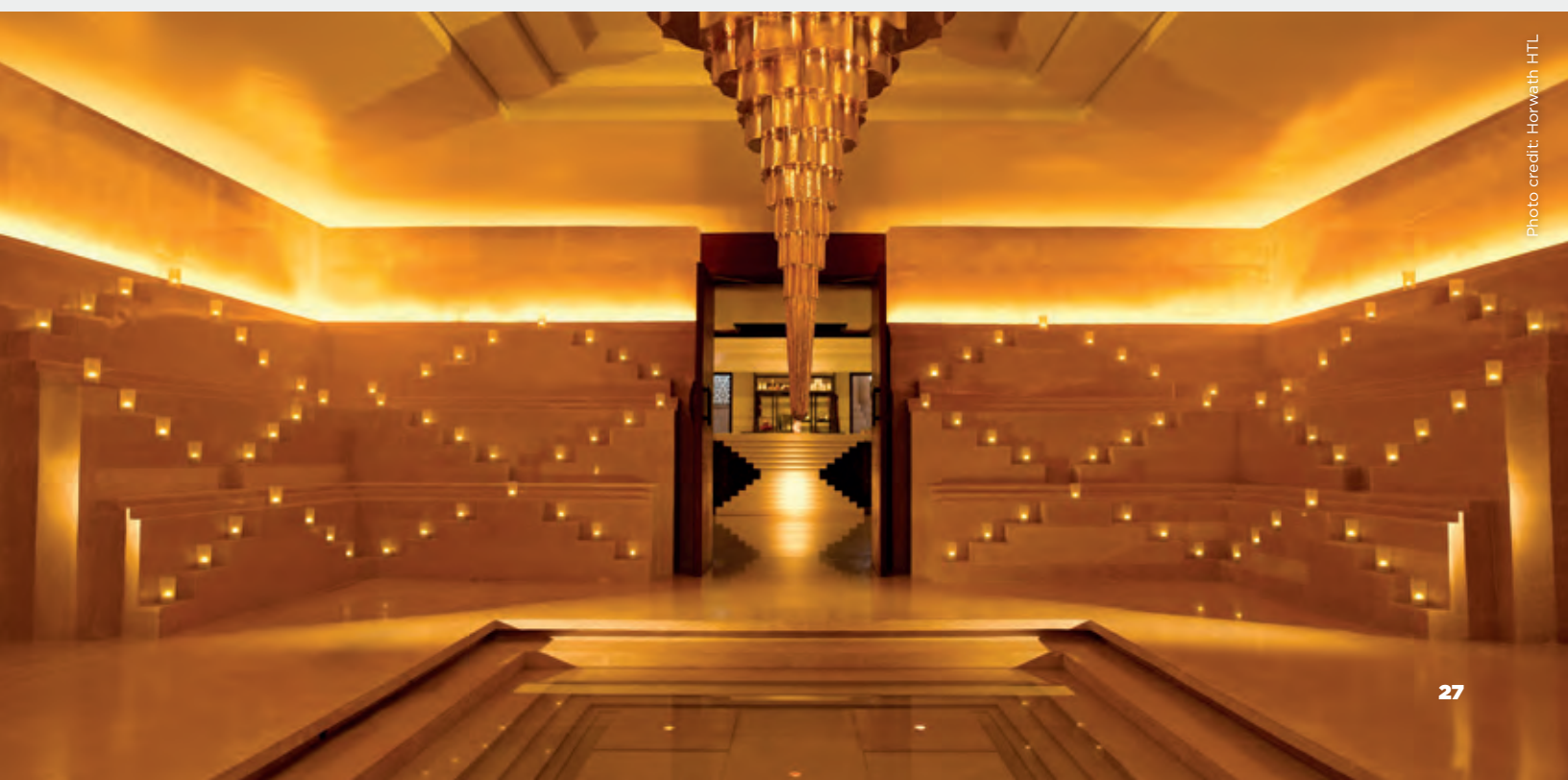


Photo credit: Horwath HTL

Marriott, AccorHotels, Hilton, and Carlson Rezidor Group retain their positions as the top four hotel chains by pipeline status (Table 6):

**Table 6. Hotel Chain Development Pipelines in Africa 2017 – Top ten chains by pipeline status**

Rank	Brands	Hotels	Rooms			Rank – All Deals
			Total	On-site Construction		
1	Marriott International	83	16,393	7,844	48%	1↔
2	Accor Hotels	84	13,286	7,630	57%	2↔
3	Hilton	41	9,098	5,767	63%	3↔
4	Carlson Rezidor Hotel Group	39	7,862	5,526	70%	4↔
5	Meliá Hotels International	9	2,437	1,837	75%	5↔
6	Deutsche Hospitality	6	2,340	1,640	70%	6↔
7	Best Western Hotels & Resorts	18	1,652	1,507	91%	7↔
8	Louvre Hotels Group	13	1,325	1,325	100%	–↑
9	IHG	7	1,632	989	61%	8↑
10	Mangali's Hotel Group	10	1,349	829	61%	10↔

Based on the deals signed by the chains at the time of the survey, 117 new hotels with almost 20,000 rooms are expected to open their doors in 2018, although expectations are often over-optimistic. Having said that, we noted above that the percentage of supply opening as scheduled is increasing, reaching 47 percent in 2016; we can, therefore, look at some 10,000 rooms opening in 2018, if not more.

The world today is a very different place to when we started this survey in 2009. I cannot remember a time when there was so much political change in the world. Africa is a big continent, with 54 countries, so it is inevitable that there will be change, but today seems so much more rapid, or perhaps more unexpected, than when Harold Macmillan talked about the “Winds of Change” in 1960.

**Table 7. Hotel Chain Development Pipelines in Africa 2017 – Anticipated opening years of pipeline deals**

Year	Hotels	Rooms	Cumulative New Rooms Open
2018	117	19,670	34,091
2019	87	17,295	51,386
2020	55	10,332	61,718
2021	20	3,671	65,389
2022	23	4,143	69,532
2024 and ongoing	15	3,284	72,816

In 2017 and 2018, there have been significant changes in the political environment in Zimbabwe, South Africa, and Angola, where leaders have relinquished power in a peaceful transition. Then, there was the quite sudden resignation of Ethiopian Prime Minister Hailemariam Desalegn, the defeat of Yahya Jammeh in The Gambia, and John Mahama in Ghana, both incumbent presidents, and a short while ago the departure of Ellen Sirleaf in Liberia.

According to Wikipedia, 16 African countries will have presidential and/or general elections in 2018, and a further 15 in 2019. Elections are very important for the hospitality industry in Africa, as political power tends to be more centralized than in more mature democracies, and major shifts are not uncommon. Investors – those who stay in hotels, and those who invest in them – need stability, which breeds confidence, and that means economic growth, a virtuous circle from which hotel owners benefit through increased demand.

We live in an era of change, and in many respects, Africa needs that change, to continue the story of “Africa Rising.” The hotel chains are certainly a significant part of that story. ✨

**Trevor Ward,**  
Managing Director, W Hospitality Group  
[www.w-hospitalitygroup.com](http://www.w-hospitalitygroup.com)



*The W Hospitality Group, a member of Hotel Partners Africa, specializes in the provision of advisory services to the hotel, tourism, and leisure industries, providing a full range of services to clients who have investments in the sector, or who are looking to enter them through development, acquisition, or other means. In sub-Saharan Africa, the W Hospitality Group is regarded as the market leader due to the market and financial expertise of its staff, its worldwide knowledge, and its commitment to its clients. The W Hospitality Group has worked in 39 countries on the continent, and is acknowledged as the most authoritative source on the African hotel sector's growth and performance.*



# UNDERSTANDING THE AFRICAN



Sub-Saharan Africa is seen as one of the most promising emerging markets worldwide. The African continent has recently become a new ground for opportunities whereas it was rejected by most hoteliers during the previous decade. To better understand the increasing level of interest for Africa, it is important to review the historical development of hotels on the continent.

Iconic hotels such as the Hotel de la Poste in Saint-Louis, Senegal or Mount Nelson in Cape Town were built as early as the

19th century. After the WW II, new hotels were developed by entrepreneurs originating from French or British colonial empires. Initially, they developed affordable lodging and then larger capacity hotels with modern comfort for businesspeople and traders mainly originating from Lebanon and Syria in Western Africa and from India in Eastern Africa, which remain influential in the African hotel community. The Akwa Palace in Douala, built in 1952, is a good example of hotels from this period.

Major change came with the development of air traffic and the introduction of intercontinental jet planes from 1960. At the same time, airline companies started to develop hotel subsidiaries such as: Pan Am with Intercontinental, Air

France with Meridien, or Sabena Belgian Airlines with Sabena Hotels. This moment coincides with the accession to independence of many countries and the construction of trophy hotel units aimed at reflecting the pride of new independent states. Several large capacity hotels are still today the reflection of this initial ambition including the Sofitel Ivoire Abidjan, the Intercontinental Nairobi, or the Hilton Abuja.

After three decades of operations and profound changes of the airline sector, African hotels have seen difficulties emerging at the turn of the 90s, as a result of a lack of investment from owners and of a gradual loss of interest from operators. At the same time, new entrants have started to penetrate





# HOTEL MARKET

the market including Laïco, Mövenpick, Serena, Kempinski, Radisson Hotel Group (formerly Rezidor). At the dawn of the 2000's, the African hotel business had developed over a wider range of products including midrange (Novotel, Holiday Inn) and economy (Ibis) but overall, it had entered into a deep crisis.

For the last ten years, the continent's economic growth has been sustained by the rise in oil prices and China's appetite for commodities. In parallel, the return of international lenders allowed the development of modernized infrastructures. If the privatization processes of state-owned hotels remain complicated as observed in Cameroon, Niger, or Togo, the opportunity to develop organically in Africa remains material. In fact,

hotel developers know the factors affecting emerging markets including economic and socio-political risks, but they are also conscious that they should expect higher yields as a reward of the risk taken.

With the exception of the most unstable countries and those affected by monetary crises, most sub-Saharan African countries offer opportunities for 3 and 4-star business hotels. On the other hand, only a handful of destinations are suitable for 5-star hotel development and, as of today, two countries offer enough potential for developing a network of domestic hotels: Nigeria and South Africa. A way to widen this potential could be to extend the territory of development by including Northern Africa (already started by Accor,

Marriott, and Radisson Group in Morocco and Algeria) or to bet on a boom of tourism in the region as Club Med, which is planning on opening a second unit in Senegal.

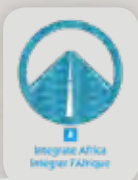
In regards to developing hotels in Africa or in the rest of the world, the key takeaway is to build a robust financing scheme deriving from a clear positioning aimed at matching material demand. ✨

**Philippe Doizelet,**  
Managing Partner,  
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# Launching the Single African Air Transport Market (SAATM)



The African Airlines Association (AFRAA) applauds the launch of the Single African Air Transport Market (SAATM), which has been championed by 23 African states in January 2018. The SAATM, “a flagship project of the African Union (AU) Agenda 2063, is an initiative of the AU to create a single, unified air transport market in Africa, the liberalization of civil aviation in Africa, and is an impetus to the continent’s economic integration agenda.”

The SAATM launch is a historic and a vital milestone towards the continental effort to start the implementation of the 1999 Yamoussoukro Decision

(YD). The momentum of full liberalization of African skies picked up in 2015, when 11 African heads of states at 24th Ordinary Session of the African Union Assembly made a solemn commitment to the implementation of the YD towards the establishment of a single African air transport market by 2017. Thereafter, the number of countries increased from 11 to 24 in March 2018, as a result of advocacy activities of the International Air Transport Association (IATA), AFRAA, African Union Commission (AUC), the African Civil Aviation Commission (AFCAC), and other industry stakeholders.

The YD provides for the full liberalization of intra-African air transport services in terms of market access, the free exercise of first, second, third, fourth, and fifth freedom traffic rights for scheduled and freight

air services by eligible airlines. With operationalization of the SAATM, intra-African connectivity will develop and in turn, aviation’s role as an economic driver will grow significantly. The SAATM will further spur more opportunities to promote intra-African trade, cross-border investments in the production, and service industries, including tourism resulting in the creation of additional jobs.

The benefits of the SAATM will be realized through its effective implementation by the states that have committed themselves to it, and by the remaining states signing up. AFRAA, in collaboration with other stakeholders, such as IATA, AUC, AFCAC, and Regional Economic Communities, is at the forefront of advocacy on the effective implementation of the SAATM. A detailed action plan has



been developed that focuses on key pillars to ensure that the industry achieves this major milestone for the prosperity of African aviation.

One of the main pillars is on the SAATM regulatory framework. In order to have a smooth implementation of the SAATM, it is important to finalize the adoption of the complete set of appropriate regulations for the oversight of the SAATM. The regulatory texts include: the powers and functions of the executing agency, the competition rules, consumer protection regulations, and the dispute settlement mechanism. The appropriate regulatory framework will ensure the enforcement of the competition rules and consumer protection regulations in order to give fair and

equal opportunity to all the actors in the liberalized intra-African aviation market. This will promote healthy competition and protect the rights of the consumers.

Another key pillar is on safety. Meeting safety and security standards is critical to the success of the SAATM. There is need to improve civil aviation safety in Africa through the attainment of the Abuja Safety Targets by African states, as well as the Windhoek Security and Facilitation Targets for the continent. This will ensure that member states and airlines meet the minimum standards of safety and security as recommended by the International Civil Aviation Commission (ICAO).

AFRAA urges the states that have signed up to go a step further to ensure

that they create an enabling operating environment for airlines so that they may realize the maximum potential of the SAATM and take advantage of the benefits that aviation brings. While it is important to note that the 24 states that have signed the solemn commitment offer a significant single air transport market space in terms of traffic volumes, the remaining African states are called upon to sign up. This will help in the realization of the far-sighted vision of a SAATM to spur the development of African aviation. ✈️

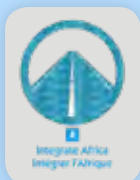
**Abdérhmane Berthé,**

Secretary General,  
African Airlines Association (AFRAA)  
<http://afraa.org>

# ETHIOPIAN AIRLINES IS DEVELOPING AFRICA'S AVIATION HUB



In the 1940s, the Imperial Government of Ethiopia, under Emperor Haile Selassie I, saw aviation as a critical infrastructure in its modernization drive. When the country emerged from the war against fascist Italy in 1941, it did not have any road network to speak of, and given the mainly mountainous nature of the country, aviation was rightly seen as an indispensable vehicle for integrating the country and for its economic development by linking it with the rest of the world.



Two decades later, in the 1960s, when many African countries freed themselves from the yoke of colonialization, aviation was an indispensable instrument for uniting the continent. That is why in many African countries, Ethiopian Airlines was the first airline to start operations, and the first to establish East and West Africa connections.



Recognizing the need to secure the necessary support from an experienced strategic partner in order to launch the national carrier on a solid footing, the Imperial Government approached the U.S. Government, which in turn arranged the partnership between Ethiopian Airlines and Trans World Airlines (TWA). Through this agreement, TWA provided technical, management, and operational support.

With the airline established in December 1945, Ethiopian Airlines started operations with the first 5 C-47 aircraft, scraps of World War II, back in April 1946 with a debut flight from Addis to Cairo via Asmara. Since this date, Ethiopian Airlines has been growing leaps and bounds and has remained an aviation technology leader in Africa, supported by a strong training center that remains the backbone of the airline since its inception. With many firsts in the history of African aviation, Ethiopian Airlines introduced the first jet service in the continent in the 1960s, the first African B767 in 1980s, the first African B777-200LR in 2010, the first African and second only to Japan B787 Dreamliner in 2012, and the first African Airbus A350 XWB in 2016.

In 2016, Ethiopian Airlines became the largest African aviation group in:

- Number of destinations served, which now covers more than 112 international points, across 5 continents, 55 destinations in Africa, and 20 domestic stations;
- Fleet with 97 of the most modern and technologically sophisticated aircraft, such as the B787 and the A350;
- Cargo with 44 freighter dedicated destinations across 5 continents, using 8 cargo aircraft, including 6 B777F



and cargo terminals with a capacity of 1 million tons annual capacity;

- Aircraft maintenance, with 6 aircraft maintenance hangars with full capability in airframe maintenance, engine maintenance, component maintenance, line maintenance, and aircraft paint in all the fleet type operated;
- Training with the largest academy in the continent with 4,000 trainees annual in-take capacity in pilot, aircraft maintenance, marketing and finance, cabin crew, and leadership development; and
- Catering with a facility capable of producing 100,000 meals daily.

This phenomenal growth was achieved, thanks to the implementation starting in 2010 of Vision 2025, the airline's fast, profitable, and sustainable growth strategic roadmap. Vision 2025 saw the airline transform into an aviation group initially with 7 independent business units or profit centers: Ethiopian Domestic and Regional Passenger Airline; Ethiopian International (intercontinental) Passenger Airline; Ethiopian Cargo and Logistics; Ethiopian Maintenance, Repair, and Overhaul (MRO); Ethiopian Aviation Academy; Ethiopian Catering Services; and Ethiopian Ground



Services. In July 2017, Ethiopian Airports merged into the Ethiopian Airlines Group.

Over the last 7 years, the airline has grown threefold by transporting 9 million passengers in 2017 (up from 3 million in 2010), and generating US\$ 3 billion in revenue in 2017 (up from US\$ 1 billion in 2010).

Leveraging its strategic location at the heart of the fastest growing trade lane in the world (China-India-Africa-South America) and premised on the phenomenal GDP growth of Ethiopia over the last 15 years (+11%), and of Africa in general, Ethiopian Airlines has invested in aviation skills and leadership development; fleets with the most modern aircraft that have been in use for with less than 5 years (the youngest in the industry); network expansion; customer service enhancement with the airline officially recognized as a 4-star carrier by SKYTRAX, the most reputed global airline customer service ranking organization; infrastructure with expansion of academy, cargo, maintenance repair, and overhaul hangars; and systems with a fully paperless and automated environment whether in the operational, commercial, or back office areas using the latest IT software and applications.

Ethiopian Airports are also implementing huge expansion projects in line with Vision 2025. The Addis Ababa Airport, Ethiopian Airlines' main hub, is undergoing a major expansion, which will be completed at the end of 2018, and will triple its capacity so that it can accommodate more than 22 million passengers annually. It will offer all the facilities, amenities, and services comparable to the best airport hubs in the world. Similarly, in addition to Ethiopian Airlines' 20 domestic airports, 7 new domestic airports are in the pipeline with a view to serve the country's booming economy's needs, and to facilitate the flow of tourism, trade, and investment.

Africa has much to offer to the world – from diverse cultural heritage and historic features, to the unique natural attractions that charm and amaze travelers from around the globe. Today, Africa is on the rise, inhabiting the newly emerging and fastest-growing economies, and the world's youngest population, which could serve as a springboard to a better future of the region.

Despite Africa's enormous potential for tourism, given the many riches the continent holds, its development, and contribution, the overall growth of the continent's economy has not risen to the desired level. Currently, aviation contributes around US\$ 70 billion and is responsible for 7 million jobs across the continent, but this could easily be doubled or tripled if the right policy framework and conditions were to be put in place.

Firstly, unlocking the continent's potential requires creating a conducive environment for the growth of the African airline industry. Unfortunately, African airlines are suffering under the weight of excessive taxes and airport charges, high fuel costs (much higher than in the rest of the world), poor airport infrastructure and facilities, and restrictive immigration policies and market access, just to



name a few. These impediments are making it difficult for African airlines to survive, much less to grow, and avail the critical air connectivity for the growth of the tourism sector.

Progress is slow and African governments, recognizing the critical role of aviation should accelerate the creation of the SAATM. African airlines should be able to operate freely within the continent and avail essential air connectivity for the flow of tourism, trade, and investment.

Ethiopian Airlines is doing its part with cross border partnerships and setting-up hubs in the different regions of Africa in line with its Vision 2025 multiple hubs strategy in Africa. In 2010, it partnered in the launch of ASKY Airlines, a community airline based in Lomé (Togo) to serve the West and Central Africa region. Prior to ASKY and after the demise of Air Afrique, travelers in West and Central African countries had to go through Europe to visit their neighbors. Similarly, Ethiopian Airlines launched another hub in Lilongwe, Malawi with the establishment of Malawian Airlines. Other projects are in the pipeline for hubs in Chad, Zambia, Mozambique, Guinea, and Equatorial Guinea.

As a truly indigenous Pan-African airline, Ethiopian Airlines is playing a pivotal role in bringing Africa together and connecting the continent to the rest of the world through an extensive global network covering more than 112 international destinations spanning 5 continents. At last, I would like to call upon fellow African carriers to join hands together and take Africa's untapped tourism potential to a higher level. ✨

**Tewolde GebreMariam,**

Chief Executive Officer,

Ethiopian Airlines

[www.ethiopianairlines.com](http://www.ethiopianairlines.com)





Photo credits: AirlinePros Inc. and Kenya Tourism Board

# FACILITATING INTRA-



Aviation is an integral part of the tourism industry. Any strategy to use tourism as a “Pathway to Industrialization, Integration, Quality of Life, Agriculture, and Powering Up Africa,” needs to address aviation as a major component and means to that end.

In January 2018, the first phase of the SAATM was unveiled, which the potential to unleash the enormous possibilities of aviation in Africa, the second largest continent after Asia.

## ATTRIBUTES OF AFRICAN AVIATION

Africa is a continent spanning 11,668,599 sq. miles (30,221,532 sq. km), a horizontal width of 4,355 miles (7,009 km) from Dakar to Mogadishu, and vertical length of 4,504 miles (7,248 km) from Cape Town to Tripoli. Combined with the major African islands, intra-Africa travel is challenging. Working with airlines, connecting destinations across Africa, is what we do at AirlinePros.

Aviation is an essential means of transportation of people and goods across the continent. National ownership of airlines and national identities are important to most countries for economic reasons, including:

- Airlines are capital intensive;
- Aviation provides the only worldwide rapid transportation system which makes it essential for global business and tourism;
- Aviation’s total global economic impact is US\$ 2.7 trillion, including direct, indirect, induced, and the catalytic effects of tourism; and
- 54% of international tourists travel by air.

Africa has many functioning airlines across the continent. Royal Air Maroc flies from New York. Air Algérie flies from Montreal. Tunis Air flies from Montreal. Egypt Air flies from New York and Nile Air flies regionally from Cairo. Ethiopian Airlines connects many U.S. and Canadian cities to the continent. Asky Airlines now flies

regionally from Togo. Rwandair connects London and Brussels to Kigali. Kenya Airways will be flying to the U.S. shortly. Precision Air flies regionally in East Africa. LAM Mozambique flies regionally in Southern Africa, while South African Airways connects New York and D.C. to South Africa, and onwards. Air Namibia flies from Frankfurt to Namibia, and onwards. TAAG Angola flies from Europe and South America to Angola, and onwards. Air Botswana flies regionally in Southern Africa. Proflight Zambia flies domestically in Zambia and regionally in Southern Africa. Air Seychelles flies from Johannesburg to Seychelles, and onwards. Air Mauritius flies from European cities and South Africa to Mauritius, and onwards. Air Austral flies from Paris to the Reunion Island, and onwards. Air Madagascar flies regionally in Southern Africa, and Air Zimbabwe and Air Tanzania are regrouping to start operations again.

African aviation is maturing well, however, with political will and structural support, it can





# AFRICA TRAVEL

grow into providing a well-organized intra-Africa travel network. Intra-Africa travel is available today, but lacks frequencies making it challenging to get from one country or city to another and onwards to another city if you have limited time available.

African governments have realized the economic benefits of an airline, in which it has some measure of control to reduce its dependency on foreign carriers for the country's long-term growth and survival. This is apparent as you see some of the governments working to rebuild Air Tanzania, Air Zimbabwe, and Zambia Airways, which had previously failed and disappeared.

African airlines can compete effectively against the big foreign airlines if they can harness economies of scale enjoyed by the bigger airlines, by joining forces in terms of joint ventures or commercial agreements like code-sharing. Each African airline that flies into another African country, which has an airline, should ideally code-share with the other airline. The benefits

are enormous in terms of cost sharing and the possibility of having a reciprocal code-share flight operated by the other airline. This will enable addition of frequencies on any and all routes to facilitate intra-Africa travel.

One of the key success factors for intra-Africa travel and tourism is the need to match the aircraft capacity with actual demand and increase the frequencies between countries.

For example, the demand can support two flights a day between Windhoek and Maun using a 30-40 seater aircraft – one in the morning, which can be an Air Namibia flight and the one in the afternoon which can be an Air Botswana flight. Both Air Namibia and Air Botswana could code-share on the route and reduce costs for themselves and provide better connectivity, and service for the tourists and other clients.

African airlines face very high lease costs for aircrafts arising from the high-risk profiles of the airlines and their respective countries. Sometimes, these risks

could be perceived risks based on some simulation models, which may not be accurate or specific but the airlines have no choice but to accept it. Often, airlines are forced to acquire aircraft which do not match the mission for which it is being bought, creating costs without the revenue.

The potential of African aviation and intra-Africa travel can be spurred by creating a joint African aircraft leasing company to overcome the many aircraft acquisition-related challenges faced by African airlines. African aviation can also be advanced with the sharing of expertise (labor pool) across borders.

Finally, if the SAATM is implemented wisely, it will attract investment into the continent, and enhance intra-Africa travel. ✈️

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# EUROMONITOR: AFRICAN CITIES AT GROWTH AND INNOVATION



When compared to mature markets like Europe, there are many untapped economic potentials in the sub-Saharan Africa region, presenting great opportunities for the travel and tourism industry. Despite various countries in

the region going through tough socio-economic periods, travel and tourism remained a strong contributor to the region's GDP. Data from the World Travel and Tourism Council (WTTC) indicate that travel and tourism accounted for 8.1% of total GDP in sub-Saharan Africa in 2017. As an emerging market, solid economic growth for the region has seen arrivals and receipts increasing, with both leisure, and business travel prospering.

Globally, many cities are increasingly becoming competitive and are positioning themselves as attractive destinations, as opposed to depending on national branding. This trend is also fueled by increasing demand from travelers seeking unique, engaging, and authentic experiences. Sub-Saharan African cities are not being left behind in this regard. City destinations, particularly major hubs such as Cape Town, Nairobi, Cairo, Johannesburg, and Lagos are being positioned at the forefront of tourism growth and innovation, whilst maintaining a

sense of uniqueness. Benefiting from favorable demographics and urbanization, many of these cities play a vital role in sub-Saharan Africa's travel and tourism landscape. These cities host key infrastructure assets and facilities, which feed into increased investments across various industries. New travel trends are also being born out of the opportunities and challenges that these sub-Saharan African cities face.

## CITY ATTRACTIONS

Overall, city attractions such as retailing, landscape, restaurants, conferences, meetings and exhibitions, and sporting and cultural events are some of the key tourist attractions attracting visitors to major cities in the region. According to Euromonitor's International Top 100 City Destinations rankings, Johannesburg was the 37th most visited city in the world in 2016. In 2017, Johannesburg accounted for over 80% of total inbound trips taken in South Africa.

## LODGING

South Africa, Nigeria, and Kenya are expected to register strong growth in luxury hotels due to their popularity with luxury travelers. Many global hotel chains are seeking to tap into the growing number of these luxury tourists. Nigeria's Lagos city is expected to see substantial investment in the lodging category, particularly in the luxury hotels segment. A

report by Hotel Partners Africa indicates that Nigeria has the most significant hotel market in the West African region with over 41 hotels spread out across 9 cities, operated by 14 hotel companies. Peer-to-peer brands such as Airbnb are also shaking up the lodging space, especially in markets such as South Africa. Apart from major cities areas, hosts from outlying areas such as townships in South Africa are also listing on Airbnb, which is a major boost to previously disadvantaged areas such as townships.

## MEETINGS, INCENTIVES, CONFERENCES, AND EXHIBITIONS (MICE)

The Meetings, Incentives, Conferences, and Exhibitions (MICE) sector is also helping the hotels category to expand. MICE is emerging as a new growth frontier and is one of the fastest growing tourism categories in the region. Many countries are tapping into this area and hoping to develop it further. South Africa is the number one destination for hosting international and regional meetings and conferences in Africa and the Middle East. Conference facilities are being built across the region in major cities such as Nairobi, Abuja, Lagos, Cape Town, and Johannesburg. Countries such as Rwanda aim to earn US\$ 150 million



# THE FOREFRONT OF TOURISM

annually from the MICE sector, to boost its tourism earnings.

## AIR CONNECTIVITY

Despite many city and international airports in the region ranking low on the global air network due to limited capacity, air travel in the region has been on the rise. International, domestic, and regional networks are being expanded with services offered to and from less popular destinations. Cities such as Johannesburg, Cape Town, Nairobi, Cairo, and Durban have developed relatively good international air connectivity, and are integrated into the global transnational network.

## SMART AND CONNECTED CITIES

Many cities in the region are positioning themselves as smart cities and focusing on being developed

technologically. In South Africa, cities such as Johannesburg have established a Smart Access Programme, which is aimed at giving free Wi-Fi to the city by 2020.

Mobile connectivity and cheap mobile data is also increasingly becoming a crucial asset to the region, particularly with the support of the digital economy. In Kenya, the use of products such as M-Pesa has turned the country into a mobile payment paradise. As a result, mobile online platforms and payments are creating a revolution in terms of travel bookings. Many travel and tourism industry players are tapping into using mobile phone based payments such as M-pesa to pay for flights, lodging, and other tourism-related services. As a result, mobile travel sales to residents in Kenya recorded a growth of 14% in 2017. The

continued growth of mobile travel is expected to continue, owing to increasing and affordable mobile devices.

Overall, travel and tourism in the cities is expected to continue growing. Many cities are expected to focus on individualized city branding in order to position themselves for opportunities in various travel and tourism sectors such as lodging, niche tourism, airlines, meetings, incentives, conferences, and exhibitions sectors. ✨

**Euromonitor International**

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# Accelerating Inclusive Tourism Growth through Technology: Airbnb



According to the World Travel and Tourism Council (WTTC), one in every ten jobs globally is in travel and tourism. These industries, in fact, account for 10% of global GDP.

The WTTC also predicts that the total contribution of tourism to Africa's GDP will amount to US\$ 269 billion by 2026. On top of this, it is also expected that 29 million new tourism-related jobs will be generated in Africa.

It is clear that tourism is big business in Africa, and now, more than ever, it is easy for everyone to get involved on various levels and benefit from tourism thanks to technological innovations like Airbnb.

Airbnb is committed to seeing economic growth through tourism on the continent. At the end of 2017, the Head of Global Policy and Communications for Airbnb announced a US\$1 million investment to support this commitment. This investment will go towards funding tourism led projects such as the upcoming African Travel Summit which will take place in Cape Town from September

11 - 14, 2018. This summit will bring leaders from across the continent together to share, discuss, and debate how technology can be used to accelerate inclusive and sustainable economic growth through tourism in underserved communities in Africa.

Former Secretary-General of the United Nations World Tourism Organization (WTO), Taleb Rifai, said the Airbnb initiative was welcomed as "an effective means to promote development in Africa."

The Airbnb platform itself allows for anyone to get involved in tourism and travel by offering up their home, a room in their house, or by creating a local experience in their area that can be listed on the site. By leveraging technology to boost people-to-people tourism in Africa, Airbnb can help build a new economic engine for local families and their communities, while helping more guests enjoy travel experiences through the eyes of locals.

Airbnb currently has more than 100,000 accommodation listings across Africa, and hosts have welcomed more than 2 million guests in the past five years. From September 2016 to the same time in 2017, host income totaled US\$ 139 million. To date, it is estimated that the total economic activity generated by hosts and guests on Airbnb in South Africa alone is around US\$ 247 million.



The Airbnb platform in Africa empowers a far more diverse range of places and people, well beyond typical hotel districts and the traditional hospitality industry, to create their own opportunities for economic stability, thereby democratizing tourism.

South Africa was the first African country represented on the Airbnb platform, and now boasts more than 43,000 active listings. In Nigeria, the latest African newcomer to the site, there are already more than 700 listings. The typical Africa host on Airbnb earns around US\$ 1,500 a year with more than half of hosts being women.

Through technological innovation, the benefits of tourism can impact many lives. Companies like Airbnb give more people the opportunity to get in on the action, including those who would not ordinarily have the means to start a fully-fledged tourism business. It is encouraging to see the growth of new hosts in so many countries across the continent, giving travelers the chance to explore, and hosts to become part of a booming tourism economy. 🌍

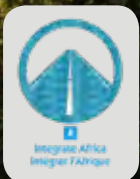


**Airbnb**  
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# ATTRACTING BUSINESS TOURISM: RWANDA CASE STUDY



Kigali, the green, safe, and modern capital city of Rwanda, was voted the third best conference destination in Africa by the International Congress and Convention Association for good reason. The city, bested only by Marrakech and Cape Town, is seen more and more as one of the premier conference destinations in the world.



Furthermore, in April 2017, the World Economic Forum published the “Travel and Tourism Competitiveness Report” after analyzing 136 economies from around the world. Unsurprisingly, Rwanda was ranked the safest country in Africa and ninth safest country on the globe for tourists.

As a result, in 2017 alone, Rwanda hosted a total number of 169 international conferences and events, bringing in over US\$ 41 million to the local economy.

Among the policies and initiatives that the Government of Rwanda did to encourage business tourism growth were the following:

- It ensured safety and security of persons and property,
- Focused strategically on guaranteeing that the right facilities and technical knowhow were present in the country,
- Implemented visa regulations that made travel into the country seamless, and
- Increased the direct air links into the country.

Established in May 2014, Rwanda Convention Bureau (RCB) is the body charged with marketing the

country as a premier business tourism destination. The RCB markets the country globally as a destination with all the prerequisite infrastructure, and modern facilities needed to host a world class event.

Flying to 27 destinations in Africa, Europe, and Asia, the national carrier, RwandAir, has ensured that business tourists can enjoy seamless flights into Kigali. Furthermore, Meeting Planners Guides and the Incentive Planners Guides can be found right inside the aircrafts. These are very important marketing collateral for conference/event organizers looking to venture into the local market.

Rwanda's presence in international trade fairs and tourism expos such as the ITB Berlin, Outbound Travel Mart, New York Times Travel Show, World Travel Markets, and the Global Conference Exhibition has been more noticeable than ever before. Rwanda's participation in these fairs and expos played a positive role in positioning the country as a business tourism destination to the global tourism industry.

To further support business tourism, commencing on January 1, 2018, the Government of Rwanda made visa-on-arrival available to the nationals of any country in the world. 🌿

**Honorable Clare Akamanzi,**  
Chief Executive Officer,  
Rwanda Development Board  
[www.rdb.rw](http://www.rdb.rw)



# Media Strategies for



Tourism continues to be one of the surest ways of alleviating poverty and also creating opportunities for people, especially the vulnerable in society. With the

obvious challenges associated with tourism on the African continent, some countries have shown leadership and become torchbearers in this area. They have engaged myriad media strategies to drive the industry to attract numbers to their respective countries. Leading African destinations like Kenya, South Africa, Seychelles, Mauritius, Morocco, and Zimbabwe to mention a few have succeeded in using the media well in reaching out to their targeted tourism markets.

The media is definitely the catalyst in reaching target markets. It can also be a nightmarish experience if the marketing campaigns are not well thought out with a compelling brand message to woo the travelers to the destinations. Most National Tourism Boards (NTBs) in Africa vary their brand message, thus distorting the image and information for the traveling public.

One underlining point for African destinations in rolling out their media strategies is to be able to control the narrative and ensure the front-line ambassadors such as PR executives, destination ambassadors, and celebrities, among others, understand their brand message.

In order for destinations to realize their full potential, there is the need to implement effective media strategies, which seek to address and position destinations in a competitive and dynamic tourism world. Travelers have become more sophisticated in researching destinations, and this means

destination managers deploying smart and effective communication plans will grow their market share.

After research and analysis to decide the objectives of destination marketing plans, the next task for Destination Marketing Organizations (DMOs) will be to define the appropriate media strategies that will drive tourist traffic to targeted destinations. Most national, regional, and local tourism bodies have limited budgets, which makes it even more important to devise smart approaches of engaging media for positive results.

## KEY MEDIA STRATEGIES FOR AFRICAN DESTINATIONS

- **Host familiarization (FAM) trips for travel writers and bloggers:** Hosting of selected journalists and bloggers at the destination is one of the key and overt ways to drive the message of the destination for onward dissemination to followers. It delivers results and develops the narrative to

visiting journalists. This needs to be done carefully with specialized writers for certain key markets. Hashtags (#) are the link that starts the conversation and are created for specific campaigns. The tourism boards of Kenya, Seychelles, South Africa, and Uganda have utilized FAM trips to their advantage.

- **Build capacity of travel writers:** African destination managers and tourism boards usually do not commit resources to training and capacity-building of their own travel journalists, which



# African Destinations

delivers results in the medium to long-term and really pays off. In today's interlinked and connected world, global media companies use local correspondents to report on issues from the destinations. If a journalist is given adequate training on the tourism product and services on what to write, they become the first line ambassadors of the destination, thus delivering key messages and communication from the start, reporting from an informed local position.

- **Create social media presence:** With the advent of social

media, comes entirely new strategies in marketing. New media largely controls today's media space, especially in the travel industry. Social media platforms now allow travelers to give instant feedback and reach larger audiences than traditional media. With strategic hashtags (#), the thread of a narrative on a destination can spark conversations and also provide instant feedback, which can serve to enact correctional measures to deliver better service.

- **Develop active websites and portals:** The 21st century is the golden age of the digital world, where everything needed can be found online with a click of a button. An interactive website is a must-have reference point for potential and would-be travelers to a destination. Travels

website should utilize search engine optimization to drive traffic to the website via popular search engines.

- **Place targeted advertorials:** An advertorial in a national newspaper, international magazine, or online space does not only appeal to the potential traveler, but adds to the profiling of the destination, and also delivers the much needed brand visibility.

## KENYA CASE STUDY

Destination Kenya represents a fine case study in using the media effectively to drive tourism numbers. As a working partner to Kenya, I have seen the Kenya Tourism Board (KTB) comprehensively take advantage of the recommendations above and go further to introduce sessions and seminars for business journalists to understand the business side of the travel and tourism trade. Engagements by the KTB with key media outlets, bloggers, and journalists during major trade shows like ITB, WTM or MKTE have proven to be working for the East African country and even in the wake of unfortunate travel advisories, the resilience of the tourism market is remarkable.

Communication plays a crucial role in making tourism a pathway to industrialization as captured in this publication. ✨

**Kojo Bentum-Williams,**

Founder,

VoyagesAfric Media Limited

[www.voyagesafric.com](http://www.voyagesafric.com)

*VoyagesAfric Media Limited is a specialized travel and tourism media company, which covers Africa extensively with its VoyagesAfric Travel Magazine and portal.*



# Animal Welfare in the



The tide is turning for animal welfare in tourism.

Visitors who come through the International Arrivals hall in Johannesburg, South Africa, see a

larger-than-life photograph of the majestic African lion sitting in his natural habitat. A year ago, they would have been greeted by a much different view of a family petting a young lion cub at an attraction that promotes direct interaction with wildlife.

After lobbying from conservation organizations and animal welfare groups, South African Tourism CEO, Sisa Ntshona, changed the photograph and spoke out against unethical animal interactions in tourism, aiming to eradicate the practice throughout South Africa.

Issues like captive wildlife interactions are not isolated to African tourism, but can be found globally in many other destinations in Asia, Europe, and the Americas.

Why are we seeing these shifts in perspective and what is changing in the travel industry in terms of how animal welfare is addressed?

## WILDLIFE TOURISM PROMOTION ON LEADING TRAVEL WEBSITES

In 2016, popular travel review website, Trip Advisor, announced that the company, alongside their ticket sales arm, Viator, would no longer sell tickets to attractions that offer inhumane direct contact with animals. Whether it is a tiger selfie, an elephant ride or a walk with a lion, certain wildlife tourist attractions provide animal interactions that are considered cruel and inhumane by the world's leading animal advocacy and conservation groups. In 2017, Expedia issued a statement declaring that they, too, were halting sales to tourist attractions that did not align with their new policies on animal welfare. The declarations were an important step forward in a travel industry that had yet to address

controversial issues in unethical animal tourism on a global scale. While a notable move, since then, advocacy and conservation groups have grown concerned over some controversial attractions still being offered on both sites.

In tandem with their decisions to halt ticket sales for some attractions, Trip Advisor and Expedia also developed online wildlife tourism education portals. Launched in early 2017, Trip Advisor's portal, linked to their main review website, furnishes information on best practices in animal welfare in tourism and the effect that many attractions have on wildlife conservation initiatives. With the goal of providing tourists with facts that will assist in making better travel decisions, the company collaborated with some of the leading voices in tourism, conservation, animal rights, and sustainability.

The rumblings of change, however, began a few years earlier when some tour companies decided to cut ties with controversial attractions. World Animal Protection, a leading animal advocacy organization, identified the power and reach of the travel industry in facilitating meaningful



# Tourism Industry

change in wildlife tourism practices. The group influenced Trip Advisor's policy revisions, and in working with well-known global tour operators, they have now grown a list topping 190 companies that are committed to cruelty-free itineraries.

## GLOBAL ATTRACTIONS, LOCAL RESPONSIBILITY

Globally, some of the most popular wildlife attractions that involve interaction with animals include tiger petting and elephant rides in Asia, lion cub petting, lion walking and elephant rides in Africa, sloth interactions in South America, and swimming with dolphins. Such attractions involve inhumane treatment of animals and can endanger the public, with many misleadingly using the draw of conservation to help promote their businesses.

In South Africa, Ntshona's focus on eliminating unethical wildlife tourist attractions could not have come at a more pivotal time. The controversial practice of lion cub petting has been

identified by leading global conservation groups as one of the cruelest attractions in animal tourism, and one that is increasingly in the spotlight, given its ties to the canned hunting industry. Like many destinations, South Africa's captive wildlife tourism industry is a complex situation where it is difficult to differentiate between legitimate educational operations, exploitative entertainment, and conservation-based sanctuaries. Botswana has addressed the issue by banning elephant rides, including at popular destination Abu Camp, which will adopt a sustainable model used at many elephant sanctuaries in Asia that forbids rides and encourages guests to walk with and observe the animals engaging in their natural behavior.

## WILDLIFE TOURISM IN THE AGE OF SOCIAL MEDIA

The rise in popularity of animal-based tourism in the age of social media has contributed to a growing demand for experiences where users can hold a

lion cub, pet a tiger, or ride an elephant. World Animal Protection found that Instagram, in particular, with its 800 million global users, promoted the greatest volume of animal exploitation on its app. Following months of collaboration with advocacy groups, Instagram launched a new alert system that appears on the phone when a user engages in certain hashtags. Tags such as #tigerselfie or #elephantride will notify the user that certain practices are harmful to the welfare of animals. The goal is to interrupt the social media process and ideally encourage people to rethink their animal tourism decisions. 🚫

**Mari Tada,**  
Sustainable Wildlife Tourism  
Consultant,  
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# BALANCING INDUSTRIALIZATION



Discourse abounds on the prioritization of wildlife conservation and industrialization. The jury is still open on whether wildlife conservation is an economic sector, system of access and allocation of resources, a set of ethics, or land use. Contention arises from lack of consensus on what wildlife means and how to measure economic value wildlife conservation just as one would measure economic value of industrialization. Should it be measured by what it brings through

different forms of utilization or the value of the space it occupies? Or, should it be measured by its intrinsic value, what is commonly referred to as heritage? Should value be measured or compared to compatible land uses on spaces set aside for wildlife conservation?

The effect of these varied views is a source of continued conflict between wildlife conservation and developmentalists. For example, Kenya's annual economic survey, lists wildlife conservation as a system of resource utilization, just like industrialization, agriculture, or mining. Yet tourism, which is highly dependent on wildlife conservation, is listed as an economic sector.



# AND WILDLIFE CONSERVATION

The contradiction and battle of the supposedly competing sectors is an everyday lived experience in Kenya as demand for space for “development” intensifies. The hiving off of part of Nairobi National Park by the state, first for the building of the Eastern bypass to revamp the road network and ease traffic congestion in the city, and second, the recent building of the Standard Gauge Railway, are good examples of the complexity of balancing wildlife conservation and industrialization. Yet, it is the state that holds the heritage value of the park, in trust, for the people of Kenya.

There is as much a rationale for wildlife conservation as there is for industrialization. However, it should never come to choices between the two. It should be about co-existence. There is evidence all around us that nature is life. The reality of choosing between nature and development is evident through climate change. In the end, what will count is whether our choices are sustainable enough to support thriving people, a thriving planet, and thriving businesses. That way the two will not be competing but complementing each other. ✨

**Judy Kepher-Gona,**  
Founder and Director,  
Sustainable Travel and Tourism Agenda  
[www.sttakenya.org](http://www.sttakenya.org)



# Connecting the Diaspora through



When I kicked off our first PANLA Taste of Africa event in June 2008 and the New York African Restaurant Week (NYARW) in October 2013, the vision was clear – to put African cuisine and culture on the map and connect the diaspora, and all lovers of Africa. The results have been outstanding – we have seen the magic that happens when people come together, helping to create a space where new partnerships and ideas could be formed. The NYARW platform brings people from all backgrounds to celebrate African cuisine and culture and sets the stage to develop and harness the next generation of cultural ambassadors, African chefs, cooks, and food entrepreneurs.



Over the past decade or so we have seen a tremendous growth in interest in

Africa. Why this sudden interest in Africa? It is clear that connecting diaspora through food, culture, and art has played a huge part. This period has seen an increased interest in African food, culture, and travel, especially from the diaspora. This interest in Africa has brought about thousands of African cultural ambassadors who are proud to show off their African heritage.

One of the effects of our work is that chefs and cultural ambassadors help popularize African cuisine. As we know, food is central to any cultural experience as it is directly related to the traditions of the country and people. Food not only allows us to bring people from all over the world to connect to Africa, it has also allowed Africans in the diaspora to learn more about each other and, hence, encourages both tourism from inside and outside Africa. I learned more about Africa and other African people in New York City, inspiring me to visit more African countries. Here in New York, one can try injera, thiebou jen, waakye, bunny chow, matoke, tagines, couscous, and so many more African dishes.

Popularizing African cuisine has a direct effect on food tourism, which could have huge positive impact on the continent. Annually during African Restaurant Week, we bring 4-6,000 people to visit various restaurants and create millions of views from our extensive media coverage from major outlets (including CNN, NBC, Forbes, Sahara Reporters, Africa Channel, many local TV channels, major magazines, and more).

According to research conducted by the World Food Travel Association (WFTA) in 2012, a food tourism strategy can help increase sales, attract media interest (a vital component in boosting tourism), and increase community engagement. According to the United Nations World Tourism Organization (UNWTO) 2014 report, *Tourism Towards 2030*, tourism arrivals in

# Food, Culture, and Arts

Africa will get to as high as 134 million by 2030 from the current level of 62 million - I believe food tourism will play a major role.

Cultural ambassadors and influencers in the diaspora also play a vital role in sharing local perspectives. They help in many ways to balance the sometime not so flattering coverage from the media. We know the

local conditions on the ground better and can better inform friends, and all those looking to better their knowledge of various travel destinations - the NYARW creates an environment that allows them tell their stories and thus share their local perspectives. I am grateful for the opportunity the community has given me and my team to be a change agent, and big thanks to all the media houses that have helped us spread the message about African cuisine, and culture.

Connecting the diaspora through food, culture and art has the potential to be a big boost to tourism and create massive positive social and economic changes on the continent. Events like NYARW with various partners, chefs, and cultural ambassadors have helped demystify Africa and made it more accessible. Connecting the diaspora is a massive game changer. I am happy that our work with NYARW has been part of helping bring about this change. I am grateful for the opportunity the community has given me and my wonderful team to be change agents and big thanks to all the media houses that have helped us spread the message about African cuisine, and culture. It is my belief that humanity is better served when we learn about each other and our various cultures. Please join us again, help re-energize the continent, and create the change we all crave. ✨

**Akin Akinsanya,**

Founder and CEO,

New York African Restaurant Week and PANLA

[www.nyarw.com](http://www.nyarw.com)

**NEW YORK  
AFRICAN  
RESTAURANT  
WEEK**

# Yolele Foods: Subsistence Becomes



Rural communities across West Africa face the effects of youth flight. Teens, seeing no opportunities at home for the kind of future they want to live, are leaving in droves for overcrowded cities. Many risk their lives and spend their families' scarce resources on perilous desert and ocean crossings in search of a better life in Europe. In addition to leaving farming communities depleted, those



who leave only rarely find a better option elsewhere. "Surging youth populations can fuel tremendous agricultural growth that will impact the global economy, but, if underemployed, they present a risk. By 2050, Africa's population will double, with 1 billion projected to be under 18 years old. How can we harness the potential of this promising demographic to secure economic growth and stability?" (The Chicago Council on Global Affairs).



## WHAT IS TO BE DONE?

For over 20 years, my work has focused on sharing West Africa's culinary culture with a wider world. Born and raised in Senegal, I have

operated ground-breaking restaurants and published award-winning cookbooks in the United States, all predicated on framing West African ingredients and traditions for an engaged American audience.

Now, I've started a business called Yolélé to reach an even wider range of people. Yolélé is centered on fonio, an ancient West African grain. Fonio has been grown throughout most of West Africa for over five thousand years. It is drought resistant and it thrives in poor sandy soil where most of the other crops cannot take hold.

Fonio's nutritional and culinary profiles address current consumer preferences in Europe and North America. It is relatively high in

# Cash for Smallholder Communities

protein, iron, and fiber, and is strong in methionine and cysteine, two essential amino acids that are deficient in most grains. Fonio is served like rice or quinoa, but it cooks up in just 5 minutes, like couscous. It tastes like couscous too, only it's gluten free.

Fonio is easy to grow, but very hard to turn into food. Yolélé is transforming the whole fonio value chain, with the goal of making the Sahel more agriculturally productive. We have initiated crop trials with West African agronomists to improve the grain's yield. Working with NGO's, they will then train and equip smallholders. Yolélé is planning to build the world's first industrial scale fonio mill, set up to

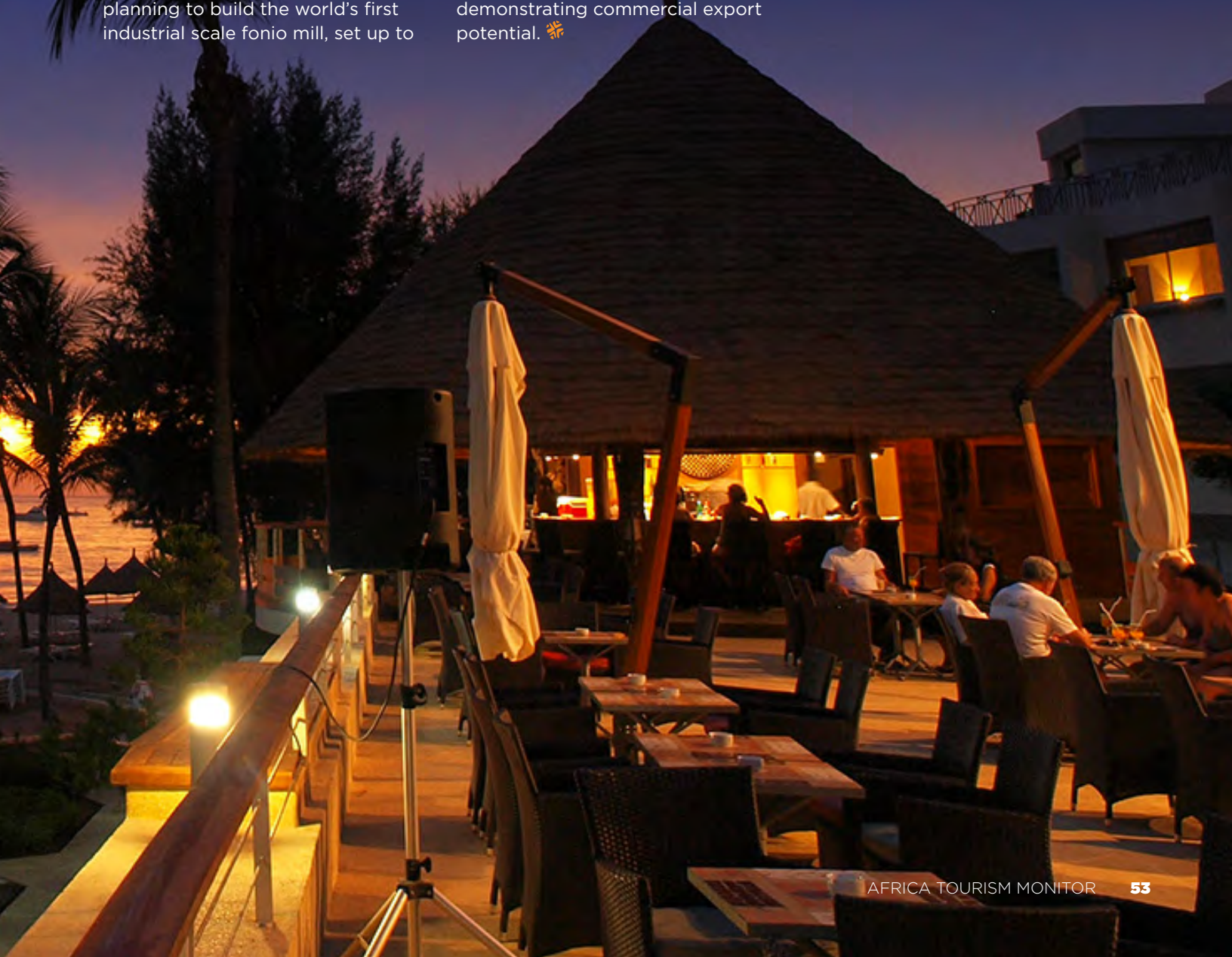
reduce the cost of processed fonio so that it is priced more accessibly for West African consumers. The mill will also comply with international quality standards so that fonio can be a viable export crop. This activity is all geared towards making the nutritious native grain fonio more widely and frequently consumed in West Africa.

Yolélé has already started to build a market for fonio in North America, spurred on by my recent TED Talk on fonio's transformative potential, which has gained well over a million views as of this writing. The hope is to catalyze investment in industrial capacity by demonstrating commercial export potential. 🌾

## **Pierre Thiam;**

President, Yolele Foods;  
Chef and Author of "Senegal: Modern Senegalese Recipes from the Source to the Bowl" and "Yolele! Recipes From the Heart of Senegal"

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# THE ROLE OF TOURISM IN SUPPORTING IMPROVEMENT OF QUALITY OF LIFE IN THE GAMBIA



Gambia's tourism is now the largest industry and one of the fastest growing economic sectors in the country. The Gambia is a leader in sustainable tourism ventures and can proudly boast of being the second country in the world to develop a sustainable and responsible tourism policy, thus enabling interventions such as social inclusion, interactive decision-making, and empowerment of small enterprises in tourism. Therefore, in The Gambia, tourism has been identified as an appropriate development strategy that has enormous positive economic impacts and environmental and social consequences.

The tourism sector has become an increasingly important industry to our country as a source of revenue, as well as a source of employment. Tourism generates a vital amount of foreign exchange earnings that contributes to the sustainable economic growth and development of The Gambia.

Furthermore, tourism brings more opportunities to upgrade facilities such as outdoor recreational facilities, parks, and roads, theaters, movies, concerts, and athletic events, which have increased tourism's contribution to both the national and local economies. Tourism has revitalized our cultures through the numerous local and international festivals, such as the Roots International Festival, and contributed to a renaissance as a vehicle for cultural preservation and enrichment.

In The Gambia, tourism brings many economic and social benefits, particularly in rural areas where it has provided an alternative livelihood for people in these communities. Studies (PAGE, Inclusive Tourism, TDMP and The Gambia NDP 2018-2021) have indicated that the relationship between the economic impact of tourism, the satisfaction with material well-being, and the relationship between the social impact of tourism and the satisfaction with community well-being, were strongest among residents in communities characterized to be in the maturity stage of tourism development.

Therefore, The Gambia realizes the significance of this sector and encourages local communities, being custodians





of this culture, to take great steps in the promotion of an inclusive and culture-centered tourism for sustainable growth.

Promoting an inclusive and culture-centered tourism for sustainable growth, the Ministry of Tourism and Culture's goal is to make tourism a highly competitive and sustainable industry that is focused on people and culture – centered on and contributing to socio-economic development. Key interventions are now focused on policy reforms in enhancing competitiveness, marketing for destination recognition and attractiveness, quality service delivery, enhanced security, product diversity, enhanced community participation, and greater linkages with other sectors, especially agriculture, and natural resources, as well as promotion of The Gambia's biodiversity and rich culture through opening up the sector to rural, and non-urban based locations. These measures will further boost tourism arrivals, tap high value market segments, and contribute to jobs and economic diversification, particularly in rural locations.

In conclusion, using the triple bottom line of sustainable tourism development (economic, environmental, and socio-cultural impacts), The Gambia's tourism policy is now realigned to give greater consideration to the role of host communities in tourism development, based on the serious implications that residents perceive tourism development as having on improving their personal and community lives. For 2018, The Gambia tourism board's work plan includes the development of 5 ecotourism projects upcountry, and opening 4 Tourism Development Areas (TDAs) away from the urban center. This is a clear indication that the government has realized the great impact this will have on The Gambian people, particularly recognizing its impact on rural youth, and women. 🌟

**Fatou Beyai Raji,**

Director, Product Development, Investment and Culture,  
Gambia Tourism Board  
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# WHERE HOSPITALITY IS ENGRAINED IN



Located in West Africa, Togo is a modestly small country and yet has a lot to offer visitors thanks to its diverse landscapes and variety of cultural traditions.

In this land of year-round sunshine, you can discover the maritime region with sandy beaches with coconut trees, historic slave sites, Lake Togo for swimming and water sports. The plateau region is endowed with an exceptional biodiversity characterized by its refreshing waterfalls, beautiful tropical forests, coffee, cocoa, and fruit tree plantation. Togo's central region is home to a wildlife reserve and slave sites, and the Kara region is a true melting-pot of cultures with its authentic Koutammakou territory which forms part of UNESCO global assets, and the savanna region that borders the Sahel, with baobab trees, and their thousand-year old traditions.

Yet, the legendary hospitality of the Togolese is the thing that makes striking a friendship a possibility at first contact. While open to global change, the Togolese carefully preserve their ancestral traditions, and culture. With a plethora of festivals and rituals such as offering the first fruits of the land to the gods, travelers can experience a range of living traditions. Populations display the wealth of their cultural heritage via rituals, songs, and dance in rich colorful ceremonies. The visitor is welcome to share in these moments of fraternal celebration, and gathering.

Be it in the city or the countryside, hotels and hostels that exist there meet the tastes and the means of visitors for business and holiday trips. Travelers can enjoy the daytime activities or the infectious jubilant ambiance of our cities by night.

I invite you to Togo, a county with a human face for an excellent stay rooted in friendship and conviviality. 🌿

**Honorable Yaovi Attigbé Ihou,**  
Ministry of Industry and Tourism,  
Togolese Republic  
[www.togo-tourisme.com](http://www.togo-tourisme.com)



# LOCAL CULTURE: WELCOME TO TOGO



# CAMEROON'S INVESTMENTS IN TOURISM INFRASTRUCTURE AND GROWTH



Cameroon is a country that is naturally blessed with tremendous tourism potentials. Every natural attraction in the continent of Africa is found in our country Cameroon; this is the reason why we say Cameroon is “Africa in Miniature” or “All of Africa in one Country.” The natural and cultural diversity, racial harmony, and political stability of Cameroon make our country an attractive tourist destination.

The government has also made great financial efforts to keep our destination competitive and visible during the past

few years, notwithstanding the difficult economic situation due to the drop in commodities prices, which affected our performance both nationally and internationally. The activities of the terrorist group Boko Haram have also contributed to the slowing down of tourism activities, particularly in the far northern region of our country.

However, these challenges, no matter how difficult they were, did not stop our ambition to maintain the status of Cameroon as a tourism destination. The combined efforts of our public and private partners kept us visible in tourism markets. Fortunately, calm has returned in the far northern region, and tourism activities are rebounding progressively. Reports of 2017 activities testify to this fact.

As we all know, our diversity alone is not enough to bring in tourists. The development of tourism anywhere very much relies on the development of appropriate infrastructure, which services the needs of a tourist and encourages investment in the sector. Infrastructure such as accommodations, restaurants, built-up attractions, tours, and transport are primarily developed by the private sector. Private investors would be unwilling to invest in tourism facilities without good airport and road infrastructure, and the availability of affordable basic services such as power, water, sewerage, electricity, health facilities, and telecommunications, which together make tourism investments economically viable.

This are the reasons why our government has identified infrastructure as a major stimulus to economic growth. What affects the economy directly affects tourism. Poor and, at times total, lack of appropriate infrastructure limits the growth of the tourism sector.

As a result of these, Cameroon has developed “Vision 2035,” an economic blueprint for transforming the country into a newly industrialized middle-income state. In this blueprint, the government has clearly stated that infrastructure is an important element in promoting the country as a tourist destination, that the importance of infrastructure, particularly government financed infrastructure, is crucial to the success of our destination.

“Vision 2035” provides the overall objectives and strategies necessary to ensure sustainable tourism development in the country. Knowing the potentiality of the tourism sector as a strategy for poverty alleviation, this strategy document is set to cope with the dynamism of the tourism industry.

We are all witnesses to the renewal of our tourism infrastructure during the past few years by government and private sector investors. For example, airports and airstrips, hotels, and utilities have been given a facelift while new ones have been built, thanks to the opportunity offered to Cameroon to host the 2017 African Nations Female Football Cup and the upcoming Male African Nations Football Cup in 2019.

However, much still needs to be done and this year, we shall pursue, among others, the realization of the following projects: the drawing up of the text of application of the tourism law which was recently voted upon by the national assembly and passed into law; continuing the renovation, and the upgrading of our hotels; securing of national tourist sites; improving capacities of workers in the tourism sector through refresher courses; and creating, and starting construction of a tourism training school. Internationally, we shall continue to aggressively promote our destination in trade fairs and saloons and explore other tourist markets in Asia, and the Americas.

In conclusion, the importance of tourism to the Cameroonian economy cannot be underestimated because the tourism industry is one of the main sources of national income and foreign exchange earnings for our country. That is why the government is determined to develop tourism in all the ten regions of Cameroon, and improve the performance of the tourism industry each year. 🌟

**Honorable Bello Boubba Maigari,**  
Minister of Tourism and Leisure,  
Republic of Cameroon  
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# UGANDA ADDRESSES WILDLIFE PROTECTION AND CLIMATE CHANGE



Uganda joined the rest of the world to celebrate World Wildlife Day on March 3, 2018. The celebrations featured a number of activities ranging from public lectures, school quizzes, exhibitions, and a marathon that week.



The annual event was organized under the national theme, “Creating a safe environment for the survival of Uganda’s big cats,” in line with the global theme, “Big cats: Predators under threat.”

Uganda’s minister of tourism and wildlife, Honorable Professor Ephraim Kamuntu, referred to the need to protect forests, wetlands, water sources, and other forms of natural resources. He emphasized that mankind has a responsibility to protect nature, referring to the biblical book of Genesis about the story of creation in which God creates the earth and all living things – animals, plants, rivers, lakes, swamps, wetlands, etc. After creating everything, He creates man and assigns to him, the responsibility of taking care of all creation, including protecting it.

Increasingly, wildlife is under threat occasioned by the loss of habitat, poaching, and climate change. Human-wildlife conflict is born out of a competition for limited resources, including water to drink, food to eat, and space to live. Human settlement is increasingly expanding in areas that have been historically inhabited by wildlife and converted into agricultural plots or grazing areas for livestock.

Uganda, like many other parts of the world, is experiencing rapid deforestation and the resultant effects of floods, landslides, and melting glaciers on top of the mountains.

These challenges have further complicated the settlement patterns of humans, and wildlife. Climate change is real and efforts to address and reverse this trend require a global response.

Illegal wildlife trade and regional conflict has contributed to a rapid loss of wildlife and endangered the survival of many species. In African countries, elephant and rhino populations have been depleted because of ivory and rhino horn international trade.

A new development paradigm is necessary to strengthen the global partnerships, regulations, and public

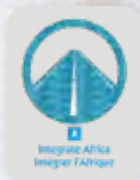


consciousness to address these challenges to the benefit of communities, and Africa's growing tourism industry. 🌟

**Ministry of Tourism, Wildlife, and Antiquities,**  
Republic of Uganda  
<https://www.tourism.go.ug>



# Building Capacity and Professional Collaborations: Association of Uganda Tour Operators



I have served as the Board Chair for the Association of Uganda Tour Operators (AUTO) for about 4 years now. During this time, I have seen the association grow exponentially, not only its membership numbers but its contribution to Uganda's tourism industry.



AUTO is Uganda's leading tourism trade association representing the interests of the country's most trusted tour companies. With over 23 years since its inception in 1995, AUTO today stands at the helm of the tourism private sector providing an avenue through which tour operators can voice

their concerns, while concurrently supporting government in tourism development.

Key among the things we strive to do as an association, has been the establishment of support systems, a fine and clear structure, the launch of our strategic plan, and having a secretariat comprised of dedicated staff members. These four factors have, and will, continue to guide the association's path forward. In addition, our corporate governance practices, the development of a board charter, consistently organizing annual general meetings, and clear

accountability have continued to present AUTO as the fastest developing association in Uganda.

In general, tourism in Uganda has also continued to grow with the increase in tourist arrivals, attraction of more investors, engaging a more vibrant private sector, and increased tourism revenue. But, this has also presented several demands such as the need to improve on the quality of service delivery in the sector. Therefore, AUTO has prioritized supporting members through capacity-building trainings, and programs. We have conducted trainings on itinerary planning and costing, winning techniques for travel expos, digital marketing, first aid, corporate communication, and much more. These programs complement on the job, and classroom learning for the benefit of the industry.

AUTO has also continued to offer its members the opportunity of collaborating on joint promotions, which normally come with discounted rates, and benefit the entire sector with Destination Uganda being promoted in single foil.

Yet, our initiative to create an enabling environment for our members to carry out business has been the closest to tangible. This has involved signing Memorandums of Understanding (MoUs) with different agencies like the Uganda Wildlife Authority and Uganda Tourism Board, through which AUTO members have positively and directly





seen an impact. For example, only AUTO members have the opportunity of purchasing discounted gorilla permits, and they are given preferential treatment when selecting participants for trade shows. We have also signed an MoU with World Travel Market Africa to get better exhibition rates for our members.

Lobbying for incentives and tax exemptions has been an ongoing agenda item, but the direct engagements with banks, insurance companies, credit bureaus, and fuel companies have resulted in better rates for the members eventuating in a relatively better business environment. Together, with the Presidential Investors' Round Table (PIRT), AUTO managed to lobby for a reduction in the tourist visa fee from US\$ 100 to the current US\$ 50. In the same accord, we were able to push the government to reconsider refurbishing the tourism training institutes, which the ministry of tourism is currently enhancing as a key priority area. We have lobbied for the creation of a proper statistics collection unit at the ministry of tourism to capture accurate tourist statistics, so that we can measure our growth, and identify trends.

Through our negotiations, we continue to advocate for a gender-balanced sector with commitment to equal opportunities to employees of all sexes. This gender-balanced model is in line with the Millennium Development Goals (MDGs) set by the UN member states.

We are currently in the advanced stages of creating a members' bonding scheme, which will provide basic insurance coverage for the members and resultantly improve bargaining power when engaging with international buyers, and travel agents.

Knowing that our members' businesses anchor on a well-conserved environment, we continue to work closely with the Uganda Wildlife Authority in advocating for conservation through different events, and through our communications channels.

Conclusively, there are exogenous challenges that still face the tourism sector, like negative travel advisories, seasonal political disruption, as well as sector-internal challenges like the unregulated tourism industry, inadequate marketing, poaching, human-wildlife conflicts, and negative media publicity, among others. Yet, generally, the tourism sector in Uganda continues to exhibit the potential to make even greater strides as an even greater foreign exchange earner, and a larger provider of employment. ✨

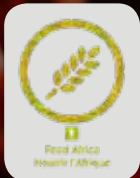
**Babra A. Vanhelleputte,**

Board Chair, Association of Uganda Tour Operators (AUTO),

Founder, Asyanut Safaris and Incentives

<http://auto.or.ug>

# Reaching Ghana's Full



A Scandinavian travel writer who toured Africa for five years, wrote this about Ghana: "In African tourism, Ghana is like the most beautiful lady in the world who is single not by choice, but because she either is not flaunting her beauty enough or does not show up where eligible bachelors roam."



Ghana is an iconic holiday destination in West Africa can be a competitive destination in Africa; hence, the wonder, especially by travel writers, is why she is not playing in the big leagues or one of "Africa's Most Visited" destinations.



While Ghana is known for its hospitality, the country has yet to invest in the tourism sector, especially in marketing the brand. Ghana is like no other country in terms of nature,

history, and culture. Ghana offers a unique cultural heritage, featuring a calendar of festivals rooted in ancient traditions; a tropical rainforest with beaches and sanctuaries for unique birds, butterflies, and monkeys; Ghana boasts most of Africa's ancient slave forts and castles built by eight different European empires. For African Americans who are tracing their ancestry by DNA tests, Ghana offers the principal display of history and relics of the Trans-Atlantic slave trade.

Above all, Ghana is an oasis of peace and security surrounded by nations in various stages of turmoil and insecurity. Yet, Ghana has not been attracting in-bound tourists in the expected millions.

While the unsatisfactory performance on the African league table has been far from impressive,

the new Ghanaian Minister of Tourism, Hon. Catherine Abelema Afeku, is optimistic. She said that, "tourism in Ghana has come of age" and is quick to point out that the sector has risen from 145,780 arrivals in 1990, 399,000 in 2000, to 897,000 in 2015.

Currently, tourism ranks as the fourth highest foreign exchange earning sector (US\$ 2.6 billion) after mining, cocoa, and foreign remittances, contributing 6.7% to Ghana's GDP. Hon. Afeku points out that "while every dollar we earn from the other sectors comes at a cost to the environment and loss of precious natural resources, it is not so with tourism. In this sector, a tourism boom is characterized by economic growth while preserving, and even adding to our resources, culture, and traditions."

Ghana has also instituted policies to facilitate capitalizing on the growing tourism market with the issuance of visa on arrival to African nationals, and this is extended to nationals of other races, especially from Ghana's target markets. To drive investment into the tourism sector, the current administration has restored GIPC Act 478 (LI 1817) of 1994, which provides generous investment incentives such as free repatriation of profits, remittances by expatriate personnel, and import duty exemptions. The corporate tax rate has also been reduced from 22% to 20%.

Ghana has unveiled its most audacious investment project yet – the Marine Drive, a 241-acre stretch of seafront tourism of high-rise hotels, casinos, golf courses, a fishing wharf, water sports, an amphitheater, and conference facilities. In December 2017, Ghana's President Nana Akufo-Addo cut the sod for work to commence on this project.

# Tourism Potential

To market Ghana as a destination for culinary tourism, the administration has created the West Africa Hospitality and Food Show to attract both chefs and leisure tourists from across West Africa. This is an offshoot of the “Eat Ghana-Wear Ghana-See Ghana” campaign launched a year ago. In addition to encouraging what is known in the country as “domestication,” this campaign opens the market to food crop farmers whose produce will now adorn the kitchens and restaurants of the hotels, and seeks to promote the local fashion industry.

For people around the world who enjoy chocolates and other cocoa products, Ghana is creating a Cocoa Museum. Here, under one roof, the visitor will be taken on a tour of the upstream and downstream processes, including a typical cocoa farm, the unique process of drying, which makes Ghanaian cocoa beans so delectable.

Three diaspora events have been instituted in partnership with a private sector operator to maximize benefits from the Pan-African Historical Theatre Festival (PANAFEST) and Emancipation which, in times past, attracted many tourists from the diaspora to retrace their roots and vicariously re-live the horrors of the Trans-Atlantic slave trade. Interest in the two major events, initiated in the 1990s to woo African American tourists and other Black diasporans has waned over the years, yet the 2017 version was the nadir. As part of activities celebrating Black History Month, the events will be rebranded as “Back to Africa” and the “Right to Return” to highlight the unique historical encounters.

Simultaneously, Ghana’s tourism is aided by an expanding aviation sector which boasts seamless connectivity to Ghana from Europe, Asia, and the Americas. Currently, thirty-six international airlines

fly to and out of Accra. Then, upon arrival in Accra, the tourist can take thirty-minute to one-hour flights to domestic destinations in the more remote parts of the country where the tourism attractions are located, including an entire village built on stilts in water, and the Elmina and Cape Coast slave castles, both UNESCO World Heritage Sites. A total of 33 tourist attractions have been earmarked for upgrades to make tourist sites more accessible and fully enjoyable. Three attractions in each of the eleven regions in Ghana will be provided with facilities to increase visitor comfort.

The Ghanaian Government is demonstrating ambitious plans spelled out in its manifesto to make tourism a priority sector. For the first time in Ghana, the minister of tourism is a member of the cabinet. In 2018, the sector will see its highest budget allocation, which went from GHc 48 million in 2017 to GHc 75 million in 2018.

For the first time in many years, the sigh from stakeholders is audible. There is hope for Ghana tourism to reach its full potential. ✨

**Ministry of Tourism, Arts, and Culture,  
Republic of Ghana**  
<http://motac.gov.gh>



# Developing Unique Travel Products and Authentic Experiences in Magical Kenya



From the Eastern side of Africa, great winds beckon travelers to Kenya – a land of endless magical adventures against the backdrop of charming views and wildlife. Kenya’s travel industry provides a diversity of products for all types of travelers. In Kenya, you find an assortment of activities that range from leisure to heart-thumping adventure and sports, trekking or horseback safaris, to surreal cultural moments.

### EXPERIENCE THE COAST

Located along the Indian Ocean, Kenya boasts 500km coastline, with tall palm and coconut trees sway welcoming visitors to the region and its vast offering of activities. Travelers who visit the coast can participate in water sports, snorkel, or discover Kenya’s secret sea life. Then, travelers may dive and scuba in the Malindi Marine Park to see a splendid variety of marine life thriving in Kenyan waters.

In addition to water activities, Kenya has significantly developed adventure travel products. Travelers can try sky-diving at the coast, a thrill is beyond what words can fully express pure and unmatched. Sky-divers can take in the incredible views of the expansive coastline from angles never seen before. When not diving or taking in adventure sports, travelers can also relax with scenic sunsets along the beautiful white sandy beaches with the majestic sound of splashing waves of the sea.

### CULTURAL HERITAGE PRODUCTS: A SURREAL WALK THROUGH TIME

Rich in history and culture, Kenya provides an opportunity for travelers to walk back in time through historic landmarks such as Fort Jesus, located in Mombasa. Built between 1593 and 1596, Fort Jesus is highlighted as one of the most outstanding and well-preserved examples of 16th century Portuguese military fortifications.

Further north, travelers can explore Maralal and visit other historical landmarks such as the Kenyatta House. Built in 1959, the Kenyatta House was famed as a halfway house between freedom and imprisonment for Kenya’s first president, the late Jomo Kenyatta, and is remembered for the suffering of Kenyans who fought for independence. The house is said to possess personal items from its former inhabitants and preserving this heritage site in Kenya allows visitors to understand Kenya’s history and people.

### CONSERVATION AND WILDLIFE EXPERIENCES: HOME OF SAFARI

Across Kenya, there are national parks and reserves full of wildlife and birdlife against the backdrop of exquisite landscapes. Visiting Kenya’s national parks and reserves allow travelers to witness throngs of wildlife like no other or marvel at thousands of flamingoes that flock at Lake Nakuru.

During the Great Wildebeest migration, wildebeests thunder across the savanna to the Maasai Mara. Travelers can go eye-to-eye with an elephant at the David Sheldrick Park or a buffalo in Amboseli, or spot the King of the Jungle at the Nairobi National Park—the only national park that lies within a city. Kenya’s massive wildlife offering showcases the Big Five in their natural habitats.

### CULINARY TOURISM: AUTHENTIC KENYAN CULTURE AND CUISINE

Kenya is an incredibly diverse country, with forty-four tribes including the Waswahili, Borana, Kalenjin, and Maasai. Visiting the Maasai Mara, one is able to experience life in harmony with nature, learn handicrafts, songs, and traditional folklore. With Kenya’s cultural diversity comes a rich and delectable display of cuisine representing culinary delicacies from tribe to tribe. Visitors can try coconut rice from the Waswahili, saucy tilapia from the Luo, njahi (black beans) from the Kikuyu, and chicken from the Luhya. With forty-four tribes to sample from, the offering of culture, and sumptuous meals is expansive.

Kenya is a country that is rich in many sites, attractions, and diverse travel products to attract visitors from around the world. We welcome guests to magical Kenya. ✨

**Kenya Tourism Board**

[www.magicalkenya.com](http://www.magicalkenya.com)





## AFRICAN DEVELOPMENT BANK GROUP (AFDB)

The African Development Bank Group (AfDB) is a regional multilateral development finance institution established to contribute to the economic development and social progress of its 54 Regional Member Countries (RMCs). The AfDB was founded following an agreement signed by member states on August 14, 1963, in Khartoum, Sudan, which became effective on September 10, 1964. The AfDB comprises three entities: the African Development Bank (ADB), the African Development Fund (ADF) and the Nigeria Trust Fund (NTF). As the premier development finance institution on the continent, the AfDB's mission is to help reduce poverty, improve living conditions for Africans, and mobilize resources for the continent's economic and social development. The AfDB headquarters is in Abidjan, Côte d'Ivoire.

[www.afdb.org](http://www.afdb.org)





Photo credit: Uganda Tourism Board