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Tourism for Economic Development in Africa

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Abstract: Tourism should be a growing area of economic potential and interest to African countries. Tourism development in Africa could be pursued within an overall services development strategy that builds complementarities and linkages with other productive sectors such as agriculture and manufacturing and that contributes to jobs and exports. Given the complexity of Africa's development challenges and the necessity to create formal jobs to reduce poverty, as illustrated in the African Union Agenda 2063, African countries should exploit all economic opportunities including harnessing the potential of tourism as a driver for economic growth and sustainable development. Policies are needed in four key areas in Africa to foster the development of tourism: improving tourism competitiveness, engaging in source market diversification, developing "brand" or niche tourism with local community involvement and integrating into the global tourism value chain, through greater use of ICT.

Keywords: Africa; Competitiveness; E-tourism; Sustainable Development; Tourism.

1. Introduction

Tourism[1] should be a growing area of economic potential and interest to African countries. According to the World Travel and Tourism Council (WTTC), travel and tourism generated 10 per cent of global GDP (US$ 7.6 trillion) and 277 million jobs in 2014, using estimates based on the Tourism Satellite Accounting methodology that aims to capture both the direct and indirect contribution of tourism in an economy. According to the WTTC, travel and tourism has been growing at a faster rate than both the wider economy and other significant sectors such as automotive, financial services and health care in recent years, with emerging economies proving to be a vibrant source market. The same institution calculated that in 2014, travel and tourism contributed in total (direct and indirect) US$ 196.8 billion or 8.1 per cent to Africa's total GDP, that translated in total employment of 20,481,500 jobs or 7.1 per cent of employment in Africa. Visitor exports were estimated to have been US$ 51.5 billion in 2014 in Africa (8.0 per cent of total exports) (WTTC, 2015). Tourism development in Africa could be pursued within an overall services development strategy that builds complementarities and linkages with other productive sectors such as agriculture and manufacturing and that contributes to jobs and exports. Given the complexity of Africa's development challenges and the necessity to create formal jobs to reduce poverty, as illustrated in the African Union Agenda 2063, African countries should exploit all economic opportunities including harnessing the potential of tourism as a driver for economic growth and sustainable development.

[1] In accordance with UNWTO methodology, a tourist in this paper is defined as an overnight visitor or as a same-day visitor (or excursionist) unless otherwise stated.

Services accounted in 2013 for 49.9 per cent of Africa's current GDP compared to 52.5 per cent for developing countries and 62.6 per cent world-wide (UNCTADStat February 2016). Services accounted for more than 60 per cent of current GDP in Botswana, Cabo Verde, Djibouti, Gambia, Mauritius, Namibia, Sao Tome and Principe, Seychelles, South Africa and Tunisia. However in most African economies, the services sector tends to consist of informal, small-scale, low value-added operations in the non-tradable sector. Services exports in 2013 amounted to US $100,500 million in Africa, representing a mere 8.4 per cent of total services exports from developing countries. Exports of travel services accounted for 40.1 per cent of Africa's services exports (UNCTADStat February 2016). Tourism can play a significant role in driving the transition of African countries from informal, small-scale, low productivity, non-tradable services sectors such as petty trade into a formal services sector that generates employment and foreign exchange. There is significant scope for African countries to further exploit the opportunities stemming from a booming world-wide travel and tourism industry and turn tourism, especially sustainable tourism into one of their pillars of economic transformation. According to an International Trade Center (ITC) and UN World Tourism Organization (UNWTO) study, tourism has a key role to play in "maximizing the contribution of trade in services to development, job creation and the achievement of the 2030 Agenda for Sustainable Development and the Sustainable Development Goals" (ITC and UNWTO, 2015). Tourism is employment intensive and can generate linkages with several other sectors of an economy, supporting production and employment in a range of auxiliary industries such as construction, food and beverages, furniture, arts and entertainment, transport, jewelry and consumer goods. A World Bank study in 2014 noted that “this more than any other time is the moment for pursuing tourism as a dynamic development option in Sub-Saharan Africa” (World Bank, 2014).

The primary objective of this article is to demonstrate the development potential of tourism as a services sector and an export sector in Africa. This objective is achieved by (i) demonstrating the unexploited potential of tourism in Africa, relative to other countries and (ii) by outlining policy recommendations for the region to harness tourism into a sustainable economic growth and export sector.

2. Trends in Tourism in the World and in Africa

Using data on international tourism receipts (as a percentage of exports) from the World Bank Development Indicators, based on data from the UN WTO[2], Table 1 illustrates that only 2 African countries depend on tourism for more than 50 per cent of their total exports (Cabo Verde and Sao Tome and Principe) but for a majority of African countries, for which data were available, (28 out of 54), tourism accounted for less than 25 per cent of total exports, the exceptions being Morocco (25.1%), Mauritius (25.4%), Seychelles (27.3 %) and Rwanda (29.1%). African countries tend to produce and export a narrow range of goods and services. Tourism offers scope for diversifying their economic and export bases.

[2] There are reliability issues on tourism data in Africa, based on UNWTO statistics. From one year to the next the sample of African countries covered varies and reliability differs across countries.

Table 1: International Tourism Receipts (Percentage of Total Exports) in 2013

Year 2013	International tourism, receipts	Year 2013	International tourism, receipts
Country/territory	**(% of total exports)**	**Country/territory**	**(% of total exports)**
Congo, Dem. Rep.	0.01	Jordan	36.06
Bangladesh	0.41	Haiti	36.98
Algeria	0.48	Croatia	39.09
Kuwait	0.49	Fiji	42.75
Swaziland	0.64	Albania	43.44
Botswana	1.39	St. Vincent and the Grenadines	47.42
Burundi	1.39	Dominica	48.34
Mauritania	1.76	Jamaica	48.84
Angola	1.78	Montenegro	50.42
Zambia	1.93	Antigua and Barbuda	56.50
Kazakhstan	1.94	Grenada	57.21
Japan	2.03	St. Lucia	57.62
Paraguay	2.08	Cabo Verde	59.19
Saudi Arabia	2.24	Bahamas, The	60.17
China	2.39	Samoa	60.93
Afghanistan	2.49	Sao Tome and Principe	62.60
Brazil	2.50	Aruba	69.79
Romania	2.50	Vanuatu	77.86
Belarus	2.62	Maldives	79.63
Korea, Rep.	2.67	Macao SAR, China	94.70
Regions		**Regions**	
East Asia & Pacific	5.28	World	6.06
Middle East & North Africa	5.73	Central Europe and the Baltics	6.15
Latin America & Caribbean	5.79	Least Developed countries	6.66
Europe & Central Asia	6.05	Sub-Saharan Africa	7.46

Source: World Bank Development Indicators (2014). **Note:** The top left-hand panel of the table shows the 20 countries/territories with the lowest percentage of international tourism receipts in total exports and the top right-hand panel the 20 countries/territories with the highest percentage. Data were not available for a few countries including in Africa (Benin, Burkina Faso, Central African Republic, Chad, Comoros, Congo Rep, Cote d'Ivoire, Equatorial Guinea, Ethiopia, Eritrea, Gabon, Gambia, Guinea, Guinea Bissau, Kenya, Liberia, Libya, Madagascar, Malawi, Mali, Niger, Nigeria, Senegal, South Sudan, Togo, Zimbabwe).

Growth in international tourism has been vibrant in the 2000s. Based on data obtained from the UN WTO, covering a sample of 218 countries and territories[3] (including 48 in Africa), the annual growth rate in total world arrivals averaged 6.8 per cent over the period 2004-2008 and 3.5 per cent for the period 2009-2013. The data available for Africa show a rapid growth of 10.0 per cent on average per year for the period 2004-2008 (comparable to that of Asia and the Pacific) which however slumped to 0.5 per cent for the next period 2009-2013. During this latter period, by region Africa scored the slowest annual average growth rate in arrivals while arrivals in all other regions grew at more than 2 per cent on average per year (Asia and the Pacific-5.3 per cent, Latin America and the Caribbean, including EU territories and departments-2.8 per cent, North America-2.8 per cent and Europe, East and West-2.7 per cent).

The slower growth in tourist arrivals in Africa as from 2009 can be ascribed to a multitude of factors, the most significant of which has been the accelerated slowdown of the North African countries as world tourism

[3] Data are not available for all countries and territories across all years. An increase (decrease) from one year to the next could reflect either (i) an increase (decrease) in number of arrivals from one year to the next for a given country or (ii) an increase (decrease) in number of countries covered in the dataset from one year to the next. The sample includes 48 African countries with data points with the exceptions being Djibouti, Equatorial Guinea, Libya, Mauritania, Somalia and South Sudan.

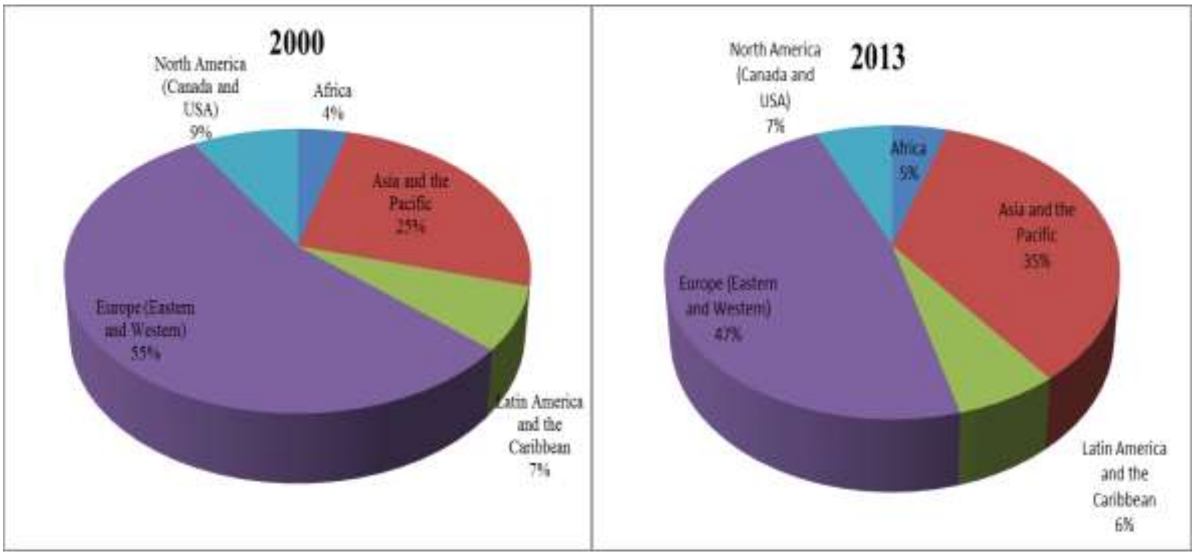
destinations due to social conflict and political instability together with rising tourism competitiveness in other regions. For example, Egypt saw its tourist arrivals fall from 12.5 million in 2009 to 9.5 million in 2013 and Tunisia from 6.9 million to 6.3 million over the same period.

There is wide heterogeneity among African countries in terms of economic performance and the tourism sector is no exception. Over the period 2009 to 2013, arrivals grew at an annual average rate of more than 10 per cent in a range of countries that included inter-alia Angola, Cabo Verde, Chad, Comoros, Congo, Congo Dem. Rep, Ethiopia, Niger, Rwanda and Sierra Leone. In terms of size of the market, based on 2013 data available for only 36 countries, the five biggest players in Africa in tourism are Morocco, South Africa, Egypt, Tunisia and Nigeria, accounting for 63 per cent of total arrivals in Africa in 2013. The next five biggest were: Algeria, Mozambique, Zimbabwe, Botswana and Kenya. These ten countries accounted by themselves for close to 80 per cent of the African market. The five smallest players were Guinea, Sierra Leone, Chad, Niger and Mali, all in West Africa, accounting for less than 0.01 per cent of the total.

The tourism market in Africa is heavily concentrated and dominated by a few countries. Only 15 countries counted more than one million tourist arrivals in 2013. While a small island like Mauritius (2,040 sq.km in size) welcomed almost one million tourist arrivals to its shores in 2013, its much bigger neighbor Madagascar (covering 587,041 sq.km) counted only 196,000 arrivals, demonstrating the extent to which tourism is an unexploited potential in many large countries. Tanzania, another large country, attracted barely more than a million tourists in 2013.

Public policy towards tourism development plays a pivotal role in enabling countries to harness the economic and social benefits from tourism in addition to other factors such as political stability and naturally endowed comparative advantages. Due to tourism remaining an unexploited economic sector in Africa, the region, despite its geographical size, is a marginal player in world tourism. Figure 1 illustrates the evolving shares of each region in total world arrivals from 2000 to 2013. Africa's share, while remaining marginal increased from 4 to 5 per cent of the world total from 2000 to 2013. The share of Europe and North America declined from 64 to 54 per cent at the benefit of Asia and the Pacific whose share rose by 10 per cent. African countries will need to put in place more aggressive policies to raise their competitiveness in the tourism sector relative to their counterparts in the Asian and Pacific markets, if they are to make further dents into a booming world tourism market.

Figure 1: Regional distribution of total world arrivals in 2000 and 2013.



Source: UN World Tourism Organization (2015). **Note:** World consists of a set of 218 countries and territories. Data is not available for each year for all 218 locations over the period 2000 to 2013.

Figure 2 charts the evolution of overnight visitor arrivals in Africa by source markets taking into account only the 29 African countries for which data are available across all years from 2000 to 2013 while table 2 shows the same information but covering all African countries for which data are available in any given year[4]. In both

[4] For Figure 2, the sample is fixed at 29 same African countries from one year to the next for which data are available for all years while in Table 2, the sample size varies depending on number of African countries for which data are available in that given year.

cases the data reveals a continuous increase in number of overnight tourist arrivals in Africa from 2000 to 2010 and a downward trend until 2013. An interesting finding is the substantial share of intra-African tourism. The largest share of overnight tourist arrivals in Africa originates usually from Europe, followed by Africa itself. These two regions accounted for more than close to 70 per cent of total overnight tourist arrivals in Africa from 2000 to 2013, based either on Figure 2 or Table 2. There is substantial scope for increasing the level of arrivals from other regions, such as the Americas, Asia and the Middle East and diversifying into other source markets. Source market diversification can be significantly enhanced in most African countries.

Total arrivals of overnight visitors to Africa and distribution by source market: 2000-2013

Figure 2:

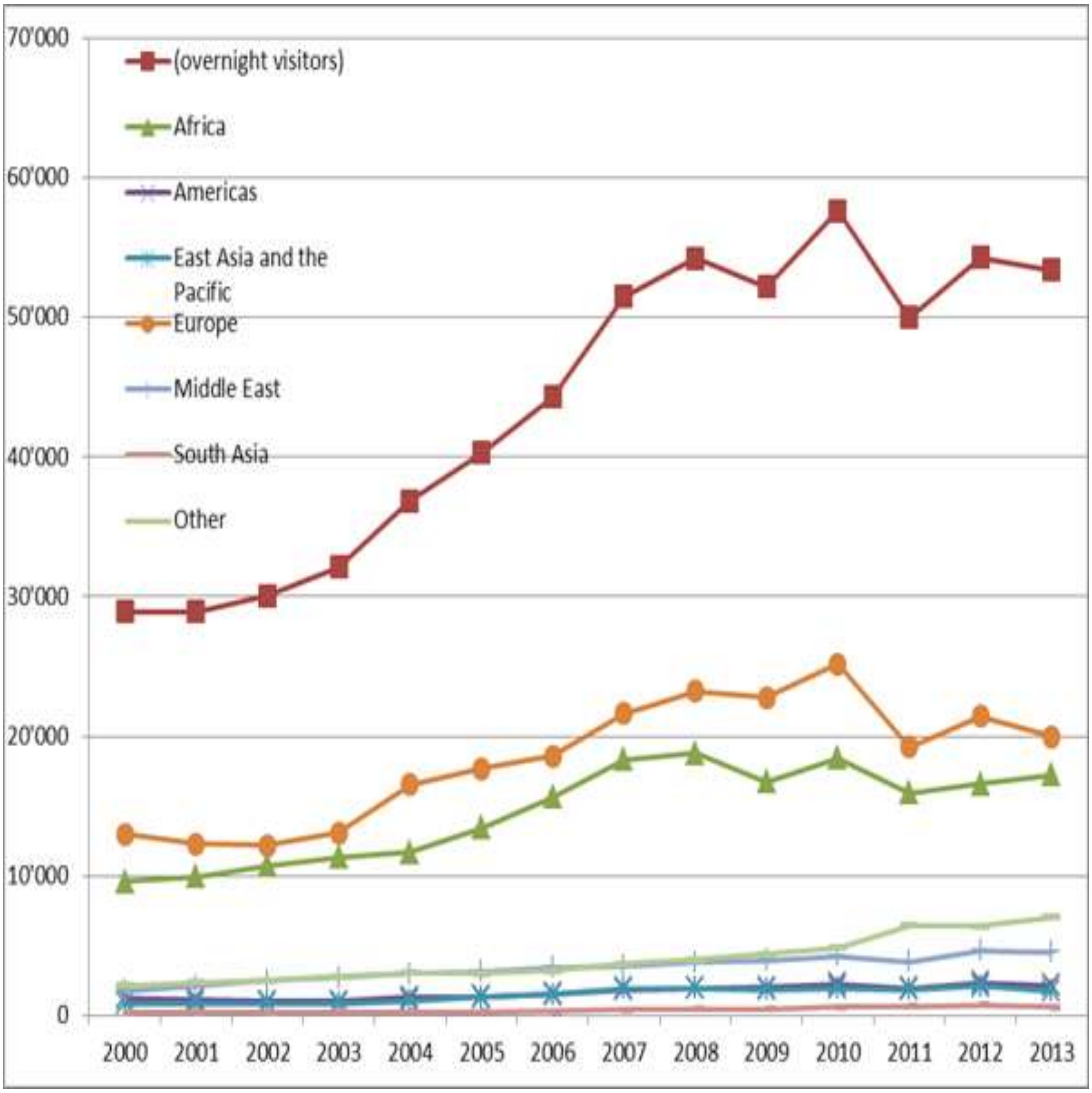


Table: 2

	Total arrivals	Distribution of Arrivals : Percentage share by region						
	(Overnight visitors)	Africa	Americas	East Asia and the Pacific	Europe	Middle East	South Asia	Other
2000	33564	35	4	3	41	7	1	9
2001	34893	38	4	3	38	7	1	10
2002	36842	40	3	3	36	8	1	10
2003	38839	38	3	2	36	8	1	11
2004	42476	34	3	3	41	7	1	10
2005	45589	35	3	3	41	7	1	10
2006	52794	39	3	3	38	7	1	9
2007	60296	39	3	3	38	6	1	9
2008	62211	39	3	3	39	6	1	9
2009	60278	37	4	3	39	7	1	10
2010	66438	36	4	3	39	7	1	10
2011	57686	36	4	3	35	7	1	14
2012	64332	36	4	4	35	7	1	13
2013	58086	36	4	3	36	8	1	12

Source: UN World Tourism Organization (2015).
Note: Figure 2 is based ONLY on countries for which a complete dataset is available for the period 2000 to 2013. 29 African countries met that criteria. Table 2 is based on all countries for which data are available.

Countries such as Chad, Côte D'Ivoire, Lesotho, Mozambique, Namibia, Rwanda, South Africa, Swaziland, Uganda, Zambia and Zimbabwe sourced more than 60 per cent of their overnight tourist arrivals in 2013 from the rest of Africa whereas countries such as Cabo Verde, Egypt, Gambia, Madagascar and Seychelles sourced more than 60 per cent of these arrivals from Europe. Only a few countries had a fairly well diversified source market base and these exceptions were: Ethiopia, Sierra Leone, and Tunisia. Ethiopia and Sierra Leone were the only two African countries that sourced close to more than 20 per cent of overnight arrivals in 2013 from the Americas, reflecting the presence of a large diaspora in the United States. In 2013, Guinea and Angola were the only two African countries whose shares of overnight arrivals from East Asia and the Pacific exceeded 10 per cent. Egypt, Sudan and Tunisia were the only three countries whose shares of overnight arrivals from the Middle East exceeded 10 per cent (actual shares were respectively 16, 51 and 36 per cent). No single African country sourced more than 10 per cent of overnight arrivals in 2013 from South Asia. By and large, African countries have not yet fully explored the potential of developing their tourism sectors through further regional diversification and within each region, through further diversification at a country level.

Table 3: Total Arrivals of Overnight Visitors to Africa, Arrivals by Air and for Holidays, Leisure and Recreation: 2000-2013

	Total arrivals (Overnight visitors)	Arrivals by air	Percentage of total arrivals	Arrivals for holidays, leisure and recreation	Percentage of total arrivals
2000	33564	16'911	50.4	17'239	51.4
2001	34893	17'521	50.2	17'116	49.1
2002	36842	17'611	47.8	16'582	45.0
2003	38839	18'237	47.0	17'898	46.1
2004	42476	21'897	51.6	21'707	51.1
2005	45589	23'670	51.9	24'532	53.8
2006	52794	26'570	50.3	28'686	54.3
2007	60296	31'678	52.5	29'634	49.1
2008	62211	33'666	54.1	31'475	50.6
2009	60278	33'148	55.0	32'966	54.7
2010	66438	36'641	55.2	37'443	56.4
2011	57686	30'585	53.0	31'335	54.3
2012	64332	30'308	47.1	29'000	45.1
2013	58086	29'339	50.5	30'465	52.4

Source: UN World Tourism Organization (2015). **Note:** Based on all countries for which data are available.

Only roughly 50 per cent of these overnight tourist arrivals were in 2013 related to travel for holiday, leisure and recreation with the other half coming for business and professional reasons (see Table 3). Given that business and professional travelers tend to stay for shorter time segments[5] and are likely to spend lesser time engaging in sightseeing and leisure activities throughout the destination than regular holiday travelers, there is scope for African countries to increase visitor expenditures and economic benefits from tourism by attracting a larger share of the world holiday, leisure and recreation travelers to their shores.

Tables 4a and 4b reveal the top 3 source markets in Africa by African destination based on non-resident visitors' arrivals at national borders. For most countries, intra-African travel is very concentrated, with the top 3 source markets within Africa accounting for more than 60 per cent of total arrivals and reaching more than 90 per cent in countries like Algeria, Angola, Lesotho, Swaziland and Tunisia. Intra-African travel and tourism is more likely to be guided by travel for personal purposes or business and professional reasons rather than for holiday, leisure and recreation. In any case, based on the available data, South Africa, Zimbabwe, Zambia, Nigeria, Mali and Kenya are popular travel spots, followed by a group made up of: Angola, Cote d'Ivoire, Cameroon, Morocco, Mozambique, Senegal and Tanzania.

Tables 5a and 5b show the top 3 source markets in Europe by African country. The European source market is also quite concentrated with the top 3 source markets accounting for more than 60 per cent of total non-resident visitors' arrivals in 18 countries and more than 50 per cent in 28 countries, out of the 35 countries for which data are available. By this measure, Niger, Madagascar, Sao Tome and Principe, Angola and Gambia have the most concentrated source markets in Europe. Traditional source markets from Europe consist of a small group of

[5] The simple correlation coefficient between arrivals for holidays, leisure and recreation and average length of stay was a positive 0.35 in a sample of data available for African countries from 2000 to 2013 and 0.46 in a sample of data available for African countries in 2013.

countries dominated by the United Kingdom, France and Germany and a second tier consisting of Italy, Netherlands, Belgium and Portugal. France was the top source market in Europe for 15 countries, out of the 36 for which data were available and the United Kingdom for 14 countries. Again, these statistics show that there is significant scope for African countries to diversify their source markets within Europe itself and outside of Europe.

Arrivals of Non-Resident Visitors at National Borders by Country: African Source Markets

Tables 4a:

Country	Arrivals of non-resident visitors at national borders per African country (1)				
	2012				
	Share of Africa in total arrivals	Africa Top 3 source markets in Africa			Share of top 3 African destinations in total arrivals from Africa
Algeria	24.12	Tunisia	Mali	Morocco	92.64
Angola	32.81	South Africa	Namibia	Zambia	84.95
Benin	61.54	Nigeria	Cote d'Ivoire	Cameroon	39.59
Botswana	85.52	Zimbabwe	South Africa	Zambia	91.51
Burkina Faso	49.69	Cote d'Ivoire	Mali	Niger	40.57
Burundi (2010)	85.76	...	..	..	..
Cabo Verde	0.06	South Africa	..	..	..
Cameroon (2007)	34.40	..	..	..	..
Central African Republic	50.72	Cameroon	Gabon	Congo Dem. Rep	29.48
Chad	..	..	..	..	..
Comoros (2011)	7.61	..	..	..	..
Congo Dem. Rep.(2013)	37.98	South Africa	Angola	Kenya	19.65
Cote d'Ivoire	..	..	..	..	..
Djibouti	..	..	..	..	..
Egypt	3.71	Sudan	Nigeria	Morocco	66.24
Gabon	..	..	..	..	..
Gambia The	10.29	..	..	..	..
Ghana (2006)	28.17	Nigeria	Cote d'Ivoire	Liberia	70.78
Guinea	38.84	Senegal	Nigeria	Mali	52.06
Guinea Bissau	44.38	Senegal	Mali	Guinea	49.31
Kenya	..	..	..	..	..
Lesotho	95.54	South Africa	Zimbabwe	Botswana	98.98
Liberia	..	..	..	..	..
Libya	..	..	..	..	..

Tables 4b:

Country	Arrivals of non-resident visitors at national borders per African country (2)				
	2012				
					Share of top 3 African destinations in total arrivals from Africa
	Share of Africa in total arrivals	Africa Top 3 source markets in Africa			
Madagascar	17.65	Mauritius	Comoros	South Africa	45.05
Malawi	81.99	Mozambique	Zimbabwe	Zambia	60.49
Mali (2011)	32.84	..	..	..	..
Mauritania	..	..	..	..	..
Mauritius	27.43	South Africa	Madagascar	Seychelles	41.32
Morocco	3.38	Algeria	Senegal	Tunisia	56.09
Mozambique	71.65	South Africa	Malawi	Zimbabwe	90.77
Namibia	76.62	Angola	South Africa	Zambia	88.27
Niger	60.33	..	..	..	..
Nigeria	23.36	Cameroon	Ghana	Niger	40.08
Rwanda	87.46	Congo Dem. Rep.	Uganda	Tanzania	82.54
Sao Tome and Principe (2010)	26.66	Angola	Cabo Verde	Nigeria	73.20
Senegal	..	..	..	..	..
Seychelles	12.23	South Africa	Mauritius	Kenya	66.30
Sierra Leone	27.37	Nigeria	Ghana	South Africa	56.98
South Africa	72.35	Zimbabwe	Lesotho	Mozambique	68.75
Sudan	..	..	..	..	..
Swaziland	91.14	South Africa	Mozambique	Zimbabwe	96.56
Tanzania	45.43	Kenya	Zambia	Burundi	56.82
Togo	..	..	..	..	..
Tunisia	16.74	Algeria	Morocco	Mauritania	95.93
Uganda	77.67	Kenya	Uganda	Tanzania	78.44
Zambia	76.14	Tanzania	South Africa	Zimbabwe	71.63
Zimbabwe	87.07	South Africa	Zambia	Malawi	79.37

Source: UN World Tourism Organization (2015). **Note:** Earliest data taken was limited to 2006. At times the category "other countries from Europe" and "other countries from Africa" were large in numbers. The top 3 destinations are based on numbers for which data were disaggregated at a country level.

Arrivals of Non-Resident Visitors at National Borders by Country: European Source Markets

Table 5a:

Country	Arrivals of non-resident visitors at national borders per African country (1)				
	2012				
	Share of Europe in total	Europe Top 3 source markets in Europe			Share of top 3 European destinations in total arrivals from Europe
Algeria	9.10	France	Spain	Italy	73.31
Angola	33.45	Portugal	United Kingdom	France	78.98
Benin	24.71	France	Switzerland	Netherlands	63.45
Botswana	8.18	United Kingdom	Germany	Netherlands	57.94
Burkina Faso	33.13	France	Belgium	Germany	67.47
Burundi (2010)	7.02	..	..	..	..
Cabo Verde	83.55	United Kingdom	France	Portugal	62.70
Cameroon (2007)	44.38	France	Germany	Belgium	44.63
Central African Republic	24.82	France	Italy	United Kingdom	67.65
Chad	..	..	..	..	..
Comoros (2011)	77.50	France	United Kingdom	..	..
Congo Dem. Rep.(2013)	26.52	Belgium	France	United Kingdom	54.32
Cote d'Ivoire	..	..	..	..	..
Djibouti	..	..	..	..	..
Egypt	72.98	Russian Federation	Germany	United Kingdom	55.78
Gabon	..	..	..	..	..
Gambia The	69.05	United Kingdom	Netherlands	Sweden	78.05
Ghana (2006)	19.26	United Kingdom	Germany	Netherlands	71.66
Guinea	35.34	France	Spain	Netherlands	71.50
Guinea Bissau	34.19	France	Portugal	Italy	69.01
Kenya	..	..	..	..	..
Lesotho	3.00	Germany	Netherlands	United Kingdom	72.21
Liberia	..	..	..	..	..
Libya	..	..	..	..	..

Table 5b:

Country	Arrivals of non-resident visitors at national borders per African country (2)				
	2012				
	Share of Europe in total	Europe			Share of top 3 European destinations in total arrivals from Europe
		Top 3 source markets in Europe			
Madagascar	69.26	France	United Kingdom	Italy	87.74
Malawi	11.92	UK/Ireland	..	..	56.79
Mali (2011)	43.03	France	Benelux	Italy	61.90
Mauritania	..	..	..	..	..
Mauritius	58.13	France	United Kingdom	Germany	72.15
Morocco	43.80	France	Spain	United Kingdom	69.59
Mozambique	20.15	Portugal	United Kingdom	..	32.36
Namibia	18.37	Germany	United Kingdom	France	59.08
Niger	25.45	France	Benelux	Germany	90.80
Nigeria	14.96	United Kingdom	Germany	France	45.91
Rwanda	6.18	United Kingdom	Belgium	Germany	47.73
Sao Tome and Principe (2010)	63.92	Portugal	France	United Kingdom	84.89
Senegal	..	..	..	..	..
Seychelles	70.42	France	Germany	Italy	57.21
Sierra Leone	26.71	United Kingdom	Netherlands	France	68.07
South Africa	15.61	United Kingdom	Germany	France	57.64
Sudan	..	..	..	..	..
Swaziland	5.77	United Kingdom	Germany	France	20.71
Tanzania	30.63	United Kingdom	Italy	Germany	36.30
Togo	..	..	..	..	..
Tunisia	49.83	France	Germany	United Kingdom	58.23
Uganda	9.08	United Kingdom	Germany	Italy	56.06
Zambia	7.66	United Kingdom	Germany	Scandinavia	59.76
Zimbabwe	6.35	United Kingdom	Germany	France	49.02

Source: UN World Tourism Organization (2015).**Note:** Earliest data taken was limited to 2006. At times the category "other countries from Europe" and "other countries from Africa" were large in numbers. The top 3 destinations are based on numbers for which data were disaggregated at a country level.

However, such source market diversification policies may not be effective unless African countries resolve their tourism competitiveness challenges relative to other countries.

3. Competitiveness of Tourism in Africa

The World Economic Forum (WEF), through its biannual report called "The Travel and Tourism Competitiveness Report" benchmarks the travel and tourism (T&T) competitiveness of about 141 economies, using an index referred to as the Travel and Tourism Competitiveness Index (TTCI). The TCCI comprises 4 sub indices (Enabling environment, T&T policy and enabling conditions, Infrastructure and Natural and cultural resources), 14 pillars[6] and 90 individual indicators (WEF, 2015).

According to the 2015 T&T Competitiveness Report, the TCCI informs policies and investment decisions related to T&T development. The 2015 Report contain data on the TCCI for 37 African countries out of 54. The top five T&T competitive economies in Africa are South Africa (ranked at No. 48), followed by Seychelles (rank No. 54), Mauritius (rank No. 56), Morocco (rank No.62) and Namibia (rank No.70). Sub-Saharan Africa showcases South Africa (48th), the Seychelles (54th), Mauritius (56th), Namibia (70th) and Kenya (78th) as its five most T&T competitive economies. 32 out of the 37 African countries figure among the bottom 70 T&T competitive economies in the world; and among the 15 least competitive countries in the world, 11 are in Africa besides Bangladesh, Haiti, Myanmar and Yemen. These are Mali, Lesotho, Mozambique, Nigeria, Sierra Leone, Burundi, Burkina Faso, Mauritania, Angola, Guinea and Chad (WEF, 2015).

It is not surprising to note that most African countries lag behind countries in other regions in competitiveness in all the 14 pillars of the TCCI, given the overall dismal state of infrastructure in many of these African countries, coupled with poor governance, weak efficiency in public services delivery and lacunas in terms of implementing effectively tourism policies and strategies.

Table 6 summarizes the performance of all 37 African countries covered in the WEF 2015 report on the 14 different pillars of the TCCI. South Africa was the best African performer on the pillars of Business environment, ICT readiness and Cultural resources and business travel. Mauritius was the best performer on the pillars of Safety and security, Prioritization of travel and tourism, International openness, and Ground and port infrastructure. Seychelles was the best African performer on the pillars of Health and hygiene, Environmental sustainability, Air transport infrastructure and Tourist service infrastructure. These three countries, among themselves, topped the African League on 11 out of the 14 pillars, with Zambia displaying the best performance on the pillar of Human resources and labor market, Egypt on Price competitiveness and Tanzania on Natural Resources (WEF, 2015).

[6] These 14 pillars are: Under *Enabling environment*: Business environment, safety and security, health and hygiene, human resources and labor market, ICT readiness; Under *T&T policy and enabling conditions*: Prioritization of T&T, international openness, price competitiveness, environmental sustainability; Under *Infrastructure*: Air transport infrastructure, ground and port infrastructure, tourist service infrastructure; Under *Natural and cultural resources:* Natural resources, cultural resources and business travel (WEF, 2015).

Table 6: African Countries Performance on the WEF Travel and Tourism Competitiveness Index

Country	Pillar 1	Pillar 2	Pillar 3	Pillar 4	Pillar 5	Pillar 6	Pillar 7	Pillar 8	Pillar 9	Pillar 10	Pillar 11	Pillar 12	Pillar 13	Pillar 14
Algeria	3.78	4.90	4.97	4.04	3.09	2.74	1.51	5.50	3.51	1.98	2.56	2.03	2.04	2.05
Angola	3.03	4.73	3.23	2.79	2.37	2.67	1.29	5.46	3.41	1.96	2.07	2.44	2.34	1.24
Benin	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Botswana	4.86	5.15	3.50	4.20	3.74	4.33	2.12	5.44	4.42	2.27	2.82	3.47	3.59	1.35
Burkina Faso	4.05	4.90	2.78	3.31	1.75	3.55	1.60	4.61	4.47	1.59	2.13	2.33	2.18	1.29
Burundi	3.78	4.55	3.91	3.61	1.90	2.45	3.15	5.02	3.78	1.64	2.80	1.90	1.91	1.14
Cabo Verde	4.42	5.18	4.64	4.39	3.52	4.52	3.13	4.48	4.32	3.63	3.42	4.56	1.83	1.05
Cameroon	3.96	5.29	3.32	4.20	1.89	3.42	1.80	4.83	3.93	1.79	2.60	2.59	3.18	1.29
Central African Rep.	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Chad	2.80	4.36	2.49	2.73	1.31	3.57	1.66	3.76	4.34	1.42	2.13	2.09	2.49	1.03
Comoros	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Dem. Rep. Congo	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Rep. of the Congo	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Cote d'Ivoire	4.13	4.68	3.08	3.29	2.94	3.31	1.76	4.46	4.09	2.04	3.31	3.26	3.30	1.27
Djibouti	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Egypt	4.11	3.40	5.40	4.12	3.80	4.56	2.17	6.19	3.99	2.93	2.84	3.60	2.45	2.40
Eq. Guinea	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Eritrea	..	..	..	..	..	..	..	..	..	..	..	..	..	..

Ethiopia	3.90	5.18	4.35	3.63	1.88	3.75	2.57	4.65	4.00	2.27	2.51	2.23	3.00	1.50
Gabon	4.18	5.22	4.19	3.61	2.85	3.00	1.34	4.99	4.30	2.03	2.14	2.68	2.80	1.18
Gambia	4.06	5.61	3.42	4.12	2.74	4.88	2.02	5.90	4.49	1.99	3.66	2.67	2.23	1.16
Ghana	4.58	4.96	3.09	4.35	3.05	3.46	1.90	4.32	3.99	2.07	3.11	2.55	2.57	1.47
Guinea	3.38	4.95	2.51	3.19	1.94	2.96	1.75	4.32	3.81	1.54	2.09	1.94	2.76	1.33
Guinea Bissau	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Kenya	4.33	3.78	3.29	4.44	3.13	5.36	3.01	4.50	4.42	2.56	3.36	3.30	4.63	1.67
Lesotho	4.23	4.42	2.93	3.91	2.47	4.03	1.66	5.27	3.87	1.59	2.83	3.01	1.98	1.02
Liberia	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Libya	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Madagascar	3.87	4.66	3.28	3.85	2.36	4.47	2.97	4.91	3.46	1.87	2.38	2.91	2.65	1.39
Malawi	4.03	5.41	2.44	4.18	2.55	3.46	2.03	4.69	4.01	1.51	2.62	2.54	2.93	1.30
Mali	3.90	4.15	3.02	3.26	2.28	3.93	2.91	4.24	4.55	1.75	2.64	2.57	2.09	1.74
Mauritania	3.46	5.06	3.03	2.30	2.18	3.12	2.94	4.82	4.15	1.59	1.96	2.37	2.12	1.11
Mauritius	5.19	5.91	5.31	4.75	4.22	5.96	3.42	3.91	4.67	2.95	4.77	5.45	2.03	1.26
Morocco	4.73	5.83	4.54	4.05	4.03	5.27	2.56	4.94	4.09	2.86	3.48	4.44	3.11	2.51
Mozambique	4.23	4.50	1.97	3.57	1.94	3.78	3.05	4.36	3.93	1.78	2.27	2.84	2.61	1.25
Namibia	4.76	5.02	3.70	3.80	3.82	4.51	2.62	5.20	4.41	3.03	3.68	4.75	3.94	1.12
Niger	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Nigeria	4.11	2.65	2.79	3.54	2.81	3.34	1.85	4.38	3.86	2.02	2.42	2.70	2.69	1.80
Rwanda	5.13	5.58	3.92	4.36	2.93	4.29	2.93	4.61	4.68	1.84	3.85	2.52	2.75	1.27

Sao Tome & Principe	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Senegal	4.11	5.41	3.13	3.63	3.02	3.79	3.07	3.56	4.36	2.03	2.89	3.38	3.04	1.43
Seychelles	4.63	5.09	5.49	4.62	4.17	5.78	2.73	3.68	5.17	4.30	4.76	5.95	2.65	1.03
Sierra Leone	4.12	5.18	2.93	3.61	1.98	3.94	1.84	4.89	3.77	1.51	2.79	1.98	2.38	1.29
Somalia	..	..	..	..	..	..	..	..	..	..	..	..	..	..
South Africa	5.35	4.3	3.85	4.09	4.29	4.88	2.38	4.99	4.29	3.28	3.59	5.02	4.28	3.39
South Sudan	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Sudan	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Swaziland	4.45	4.65	3.19	3.70	3.00	4.28	2.96	5.49	4.48	3.03	3.49	2.88	2.16	1.02
Tanzania	3.97	4.85	2.68	4.03	2.48	4.83	3.25	4.87	3.78	1.94	2.56	2.70	4.91	1.54
Togo	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Tunisia	4.42	4.86	5.16	4.31	3.94	4.91	2.38	5.61	4.22	2.53	3.02	4.54	2.36	1.58
Uganda	3.87	4.62	2.72	4.11	2.72	4.04	3.03	4.82	3.96	1.81	2.65	2.61	3.51	1.50
Zambia	4.75	5.40	2.44	4.99	2.51	4.07	2.30	4.92	4.16	1.93	2.80	2.94	3.58	1.28
Zimbabwe	2.97	5.31	3.00	3.83	2.82	3.87	2.22	4.96	4.18	1.79	2.74	2.84	3.51	1.46
Best performer	**South Africa**	**Mauritius**	**Seychelles**	**Zambia**	**South Africa**	**Mauritius**	**Mauritius**	**Egypt**	**Seychelles**	**Seychelles**	**Mauritius**	**Seychelles**	**Tanzania**	**South Africa**
Worst performer	**Chad**	**Nigeria**	**Mozambique**	**Mauritania**	**Chad**	**Burundi**	**Angola**	**Senegal**	**Angola**	**Chad**	**Mauritania**	**Burundi**	**Cabo Verde**	**Lesotho**

Source: World Economic Forum (2015). **Note**: 1 = Business environment, 2=Safety & security, 3 = Health & hygiene, 4=Human resources & labor market, 5=ICT readiness, 6=Prioritization of travel & tourism, 7 = International openness, 8 = Price competitiveness, 9 = Environmental sustainability, 10= Air transport infrastructure, 11= Ground & Port infrastructure, 12= Tourist service infrastructure, 13= Natural resources, 14= Cultural resources & business travel.

However, on a scale of 1 to 7, many African countries scored less than 4 on most indicators: 13 scored less than 4 on the pillar of Business environment, 3 on the pillar of Safety and security, 28 on the pillar of Health and hygiene, 19 on the pillar of Human resources and the labor market, 33 on the pillar of ICT readiness, 19 on the pillar of Prioritization of travel and tourism, 37 on the pillar of International openness, 4 on the pillar of Price competitiveness, 14 on the pillar of Environmental sustainability, 36 on the pillar of Air transport infrastructure, 35 on the pillar of Ground and port infrastructure, 30 on the pillar of tourist service infrastructure, 34 on the pillar of natural resources and 37 on the pillar of Cultural resources and business travel (WEF, 2015).

Based on the above, in order to improve their tourism competitiveness, the top three priorities for the majority of African countries are to: (i) Invest in hard and soft infrastructure that is directly linked to (a) provision of tourism facilities such as improving on ground and port infrastructure, airport infrastructure and other specific tourist infrastructure (e.g. better roads, efficient and safe public transport facilities, building new hotels, providing duty-free shopping, building air terminals, improving on existing air connections) and also (b) improving on connectivity such as ICT and phone connectivity; (ii) Invest in setting up specific tourism facilitation measures, as part of trade facilitation measures (e.g. facilitating visa procedures online, introducing e-regional visas) and (iii) Invest in environmental sustainability and enhance preservation and promotion of cultural and natural heritage (e.g. creating protected marine and ecological areas, conserving wildlife, fauna and flora, holding cultural festivals).

Table 7 lists the 3 worst rankings of each African country on the 90 individual indicators of the TCCI. There is heterogeneity among the 54 African countries regarding their most pressing competitiveness challenges. Countries like Egypt, Kenya, Mali and Tunisia count terrorism and its related business costs as a constraint to their tourism competitiveness;

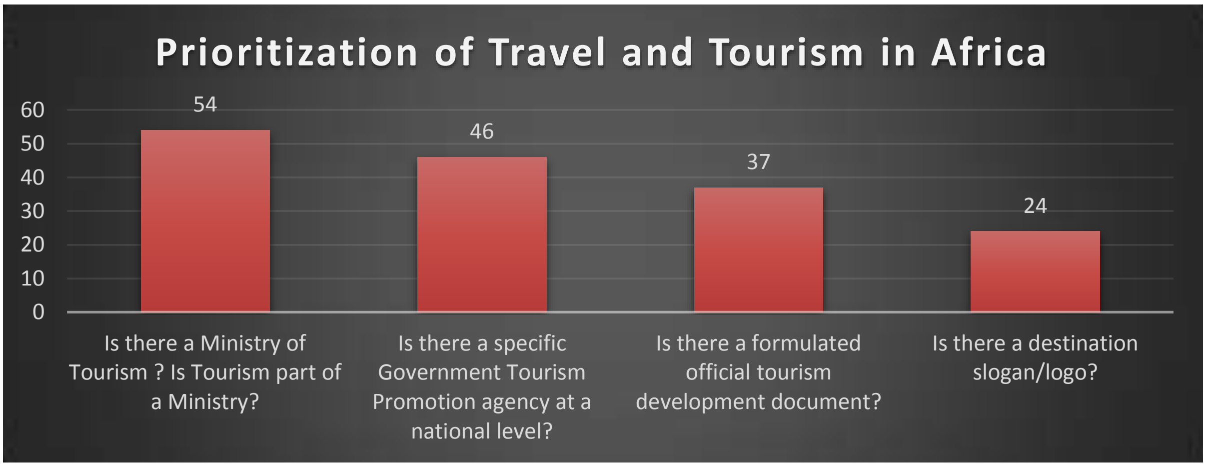
Table 7 : Priority Areas of Improvements in Tourism Competitiveness by African Country

Country	Worst 3 ranks on the WEF Travel and Tourism Indicator (based on ranking ascribed*)
Algeria	Female labour force participation rate; ATMs accepting visa cards per million pop; total tax rate (% of profit)
Angola	Extent of market dominance; Internet use for B2C transactions; Visa requirements (0-100 best)
Botswana	HIV prevalence (% pop); Airline intl seats kms per week (millions); treatment of customers
Burkina Faso	Natural tourism digital demand (0-100 best); secondary education enrollment rate (%); extent of staff training
Burundi	Reliability of police services; individuals using internet (%); mobile phone telephone subscriptions per 100 pop
Cabo Verde	Total known species; Fuel price levels (US$ cents /litre); Total protected areas (% total territorial area)
Cameroon	Construction permits costs (%); Mobile network coverage (% pop); Profit tax rate (% profit)
Chad	ICT use for B2B transactions; Internet use for B2B transactions; Cost to start a business (% of GNI per capita); treatment of customers
Cote d'Ivoire	Secondary education enrollment rate (%); Primary education enrollment rate (%); Individuals using internet (%)
Egypt	Extent of staff training; Business costs of terrorism; Enforcement of environmental regulations; Stringency of environmental regulations
Ethiopia	Mobile telephone subscriptions per 100 population; Individuals using internet (%); Internet use for B2C transactions; ICT use for B2B transactions; Access to improved drinking water (% pop); Physician density per 1,000 people
Gabon	Comprehensiveness of T&T data; Quality of ground transport network; Paved road density (km/surface area)
Gambia	Other taxes (% profit); Cost to start a business (% GNI capita); Broadband internet subscriptions per 100 population; Comprehensiveness of T&T data (0-120 best)
Ghana	Access to improved sanitation (% pop); Comprehensiveness of T&T data (0-120 best); Ticket taxes, airport charges (0-100 best)
Guinea	Quality of electricity supply; Quality of roads; Quality of ground transport network; Natural tourism digital demand (0-100 best)
Kenya	Profit tax rate (% profit); Business cost of terrorism; Index of terrorism incidence; Access to improved drinking water (% pop); HIV prevalence (% pop)
Lesotho	Quality of air transport infrastructure; HIV prevalence (% pop); Openness of bilateral ASA (0-38)

Madagascar	Hospital beds per 10,000 population; Access to improved drinking water (% pop); Construction permits cost (%)
Malawi	Access to improved sanitation (% pop); Mobile telephone subscriptions per 100 population; Airline international seat
Mali	Hospital beds per 10,000 pop; Business costs of terrorism; Airport density per million urban population;
Mauritania	Road density (km/surface area); Extent of staff training; Comprehensiveness of T&T data (0-120 best)
Mauritius	Total known species; total protected areas (% of total territorial area) ; threatened species (% total species)
Morocco	Female labour force participation (% to men) ; Profit tax (% profit); Baseline water stress (0-5 worst)
Mozambique	Quality of roads; Access to improved drinking water (% pop); Secondary education enrollment rate (%);
Namibia	Ease of hiring foreign labour; HIV prevalence (% population); Ease of finding skilled employees
Nigeria	Construction permits cost (%); T&T government expenditure (% government budget); Broadband internet subscriptions per 100 people; Primary education enrollment rate (%)
Rwanda	Broadband internet subscriptions per 100 people; No of operating airlines; Mobile telephone subscriptions per 100 people
Senegal	Hospital beds per 10,000 population; Ticket taxes, airport charges (0-100) best; Physician density per 1,000 population; Primary education enrollment rate (%)
Seychelles	Total known species; Openness of bilateral ASA (0-38); Total protected areas (% total territorial area)
Sierra Leone	Broadband internet subscriptions per 100 population; Individuals using internet (%); Internet use for B2C transactions; Physician density per 1,000 population; Access to improved sanitation (% population); Secondary education enrollment rate (%)
South Africa	Hiring and firing practices; Ease of hiring foreign labour; HIV prevalence (%) population; T&T government expenditure (% government budget)
Swaziland	HIV prevalence (% population); No of operating airlines; Natural tourism digital demand (0-100 best)
Tanzania	Physician density per 1,000 population; Access to improved sanitation (% population); Access to improved drinking water (% population)
Tunisia	Country brand strategy rating (1-10 best); Female labour force participation (% to men); Business costs of terrorism; Other taxes rate (% profit)
Uganda	Mobile telephone subscriptions per 100 population; Secondary education enrollment rate (%); Construction permits cost (%); Hospital beds per 10,000 population; Comprehensiveness of T&T data (0-21 best)
Zambia	HIV prevalence (% population); Access to improved drinking water (% population); Physician density per 1,000 population
Zimbabwe	Ease of hiring foreign labour; Pay and productivity; Property rights; Impact of rules on FDI; No of days to deal with construction permits; Hiring and firing practices

Source: World Economic Forum, 2015. **Note:** *In case the same ranking was ascribed to the same indicators, all indicators are reported.

Figure 3: Prioritization of Travel and Tourism in Africa



Source: Authors' own internet-based research (October/November 2016).

Botswana, Lesotho, Namibia, South Africa, Swaziland and Zambia count prevalence of HIV as a cost to their tourism competitiveness; extent of staff training is a challenge in countries like Burkina Faso, Egypt and Mauritania; quality of roads or of ground transport networks are constraints to tourism competitiveness in Gabon, Guinea, Mauritania and Mozambique while availability and quality of health facilities is an issue in Ethiopia, Madagascar, Mali, Senegal, Tanzania and Zambia. High profit tax rates constrain private sector involvement in the industry in countries such as Algeria, Cameroon, the Gambia, Kenya, and Morocco. Access to water and sanitation facilities impede tourism competitiveness in Ethiopia, Ghana, Kenya, Madagascar, Malawi, Mozambique, Sierra Leone, Tanzania and Zambia. Incomprehensive data on travel and tourism impede strategic planning and decision making in the industry in countries such as Gabon, Gambia, Ghana, Mauritania and Uganda. Visa requirements or accessibility by air are constraining competitiveness factors in Angola, Botswana, Malawi, Mali, Rwanda, and Swaziland (WEF, 2015).

In many African countries, tourism has been identified and prioritized "on paper" as a sector that can boost economic growth and employment. Most African countries have diagnosed the constraints to their tourism competitiveness and elaborated policies and action plans "on paper" to develop their tourism sector.

Figure 3 shows that all 54 African countries as at 2016 had a Ministry, either wholly or partially dedicated to tourism. Very few countries however has a Ministry exclusively devoted to the tourist industry (exceptions are for e.g. Angola-Ministry of Hotels and Tourism, Cameroon-Ministry of Tourism and Leisure, Zimbabwe-Ministry of Tourism and Hospitality Industry), while for most countries, tourism falls under a ministry that also deals with either trade and industry (e.g. Burundi, Cabo Verde, Rwanda), or with culture, creative arts and handicrafts (e.g. Benin, Côte d'Ivoire, Ghana, Seychelles, Tunisia), or with the environment, wildlife and natural resources (e.g. Botswana, Zambia) or even with communications (e.g. Mauritius). 46 out of 54 African countries had a National Tourism Promotion Office or Authority based in their countries whose primary responsibilities are to enhance the image of the country to tourists, provide information about the destination to tourists and attract investors to the sector (the 8 exceptions are the Central African Republic, Equatorial Guinea, Eritrea, Guinea Bissau, Liberia, Somalia, South Sudan, and Sudan). 37 out 54 African countries have a formulated and official government tourism development strategy, tourism policy or tourism master plan. Several African countries have benefited from technical assistance either from the United Nations World Tourism Organization (UNWTO) or the International Trade Center (ITC) to elaborate development strategies and policies on tourism, and in some cases, with financial support from the Enhanced Integrated Framework (EIF) under the Aid for Trade Initiative. Only 24 countries[7] however have a destination slogan, indicative of a branding strategy.

While the sources of competitiveness deficit in the tourism industry, relative to other destinations, is known and documented for most African countries, an important challenge for them has been to translate strategies, action plans and policies elaborated "on paper" into actual concrete measures. In Africa, often the "devil lies in the implementation". The final section of this article highlights 4 major policy recommendations for African

[7] Burkina Faso, Cameroon, Chad, Democratic Republic of Congo, Egypt, Equatorial Guinea, Ethiopia, Gambia, Kenya, Lesotho, Malawi, Mauritius, Morocco, Mozambique, Namibia, Rwanda, Sao Tome and Principe, Seychelles, South Africa, Swaziland, Tunisia, Tanzania, Uganda and Zimbabwe.
, Tanzania and Zimbabwe.

countries in order to catalyze tourism as an engine of economic growth, export revenues, employment creation and sustainable development for their economies.

4. Policy Recommendations:

Improving upon tourism competitiveness, engaging in source market diversification, developing "brand" or niche tourism with local community involvement and integrating into the global tourism value chain.

4.1. Improving on Tourism Competitiveness:

As mentioned previously, 37 African countries over the past 20 years or so have elaborated a tourism development strategy paper, tourism policy paper or tourism master plan that outlines constraints to the development of tourism in their economy and recommends areas for policy making. For example, Tanzania has a National Tourism Policy dating back to 1999, that had already identified inadequate infrastructure among the ten constraints to the development of tourism in the country. South Africa, a leader in the area of tourism on the continent and which is aspiring to become a top 20 world destination by 2020, has a National Tourism Strategy that identifies 4 cluster areas for action: the first cluster focusing on policy, strategy, regulations, governance, monitoring and evaluation, the second cluster on demand and supply factors for tourism (including developing rural tourism), the third cluster on people development and the fourth cluster focusing on growth enabling factors in the sector, such as safety and security, and domestic, regional and international airlift. Liberia's National Export Strategy on Tourism (2016-2010), prepared with technical assistance from the ITC and financial support from the EIF, has a detailed plan of action for achieving its 6 strategic objectives for the tourism sector. Its strategic objectives include improving the business/investment climate for the tourism sector, improving infrastructure for supporting the sector, improving skills development, ensuring environmental sustainability and integration of local communities in the sector's development, improving institutional capacities and coordination in the sector and improving the Liberian tourism brand by developing robust tourism offerings.

One way for improving tourism competitiveness in many African countries is for them to accelerate the actual implementation of their tourism strategies, policies and action plans and to do so on a sustained basis. Two important factors constraining the implementation of T&T strategies, policies and action plans in Africa are insufficient funds and capacity constraints. African countries should resort to technical assistance for building capacities at implementing their tourism strategies in addition to having a resource mobilization strategy for funding the activities earmarked as part of their tourism strategies and plans. Tourism development strategies should also be better mainstreamed into national trade development and national development strategies (UNWTO and EIF, 2015).

For African Least Developed Countries (LDCs), there is scope for them to mainstream their tourism development strategies and plans into their Diagnostic Trade Integration Studies (DTIS), under the Aid for Trade (AfT) Initiative and to leverage greater financial and technical resources under the AfT to implement their tourism strategies. According to the UNWTO and the EIF, tourism is not yet a priority for donor countries. Only 0.09% of total Official Development Assistance (ODA) and 0.78% of total AfT disbursements were allocated for tourism in 2013 (UNWTO and EIF, 2015). The same sources noted that “tourism’s underrepresentation in international financing for development flows remains a critical obstacle to unlocking its full development potential” (UNWTO and EIF, 2015). African governments should negotiate both with their traditional and non-traditional donors (e.g. India, China) for a greater proportion of their traditional and non-traditional Official Development Assistance (ODA) to be allocated to the tourism sector. Assistance from international organizations such as the EIF, the UNWTO, UNCTAD and the ITC should be sought for capacity building in the tourism sector. Since 2011, the EIF has supported tourism projects in Burundi, Liberia, and Sierra Leone and such support should be scaled up and extended to other African LDCs. Countries that have succeeded at turning tourism into an economic pillar, be it on the continent and elsewhere (e.g. Mauritius, Seychelles, France, Switzerland) could also be approached for sharing their technical expertise and experiences in the area of tourism development and hospitality management. For example, in a spirit of intra-African cooperation, Seychelles and Rwanda had engaged in a Memorandum of Understanding for tourism and cultural exchanges in 2012. Part of the objectives was to allow Rwanda to tap into the expertise of the Seychelles in order to develop itself as a viable tourism destination. Developed countries could also for instance fund entirely the participation of African LDCs in trade and tourism fairs abroad as part of helping these countries market themselves as tourism destinations.

ODA on its own however is not sufficient to finance the implementation of tourism strategies and policies in Africa and has to be complemented with domestic resource mobilization efforts. In this respect, African countries should better harness public-private partnerships (PPP) for developing their tourism products and develop models of PPP that are beneficial to them. Furthermore, public investments in tourism infrastructure could be used to catalyze private investment in the tourism sector while building complementarities between these two types of investment. In the Caribbean, for example, PPP have been a developmental tool for improving on tourism competitiveness (UNECLAC, 2008). The UNWTO 2015 report titled "Global Report on Public-Private Partnerships: Tourism development" highlight the role that PPP can play in facilitating innovation. In the African context, the public sector should engage with the private sector to better diagnose the constraints of tourism development and identify financing options in a collaborative manner. For example governments and private tourism operators can co-finance tourism marketing campaigns abroad. The same report highlights how in Botswana, government, local communities and NGOs worked together to have the Tsodilo Hills listed on the UNESCO World Heritage Site list and how that listing through a stable PPP attracted donor funding that was used for upgrading tourism facilities and services at the site (UNWTO, 2015).

Another financing option for the implementation of T&T strategies in Africa is the use of tourism levies. A special levy could be imposed on economic operators both inside and outside the tourism sector (e.g. airline companies, foreign mining companies) to feed into a Tourism Development Fund set up for the purpose of financing activities identified in the Tourism Master Plan. For example, the Singapore Tourism Board runs a five-year Tourism Development Fund whose objectives are to support the development of quality tourism products and services and enhance capabilities and talent in the industry. In Africa, Kenya has a Tourism Development Fund whose objectives are, inter-alia, to finance the development of tourism products and services, market Kenya as a tourism destination, and finance training and capacity building activities in the industry. The Fund is nurtured through the imposition of a tourism fund levy (that can be paid through MPESA). A similar Tourism Development Fund, financed through tourism levies to support product development, research, training and infrastructure development exists in Zambia. These Funds could also be accrued by other sources including ODA, philanthropic donations, diaspora donations and by an earmarked percentage of natural resource rents in primary commodity-rich countries in Africa. The Government could also support the Fund by granting it access to credit at preferential rates through a preferential sectoral credit policy, mandated by the Central Bank to commercial banks.

4.2. Engaging in Source Market Diversification:

While improving tourism competitiveness is a priority for most African countries, these countries must also have a well-defined strategy as to the source markets they intend to target. At the start of their tourism life cycle, African countries can pursue a strategy bent on raising their attractiveness as tourism destinations to a few key source markets that offer possibilities of "quick" inroads. However as tourism destinations mature, it becomes necessary to diversify the tourism product on offer as well as diversify source markets. As the empirical analysis of Section 2 shows, there is great scope for African countries to diversify their heavily concentrated source markets in order to increase the size of their tourism industry, expand tourism-related economic benefits and reduce their exposure to external shocks. Over-reliance on a few source markets increases the vulnerability of the destination to idiosyncratic shocks and can grind the tourism industry to a sudden halt. For example the economic and financial crisis in Western Europe had a severe impact on tourism in those developing countries that were more dependent on European and Northern American markets. A joint UNWTO and ILO report notes that "Countries with more diversified source market basis have been comparatively less affected by the decrease in international tourism during the global economic crisis" (UNWTO and ILO, 2013). As African countries strive to improve their tourism competitiveness, their tourism policies must also be oriented towards diversifying their source markets across several regions and sub-regions in the World. Intra-African travel and tourism should also be promoted.

Mauritius is an example of a country that has succeeded at diversifying its source markets. In 1995, the top 5 source markets (France, Reunion Island[8], South Africa, Germany and the United Kingdom) accounted for 73.6 per cent of total arrivals of non-resident tourists at the border. By 2000, the percentage of the top 5 source markets fell to 69.5 per cent and fell further to 63.2 per cent in 2014. However by 2014 China overtook Germany to rank among the top 5 source markets, reflecting a deliberate policy on the part of Mauritian authorities to tap into emerging Asian countries. By 2014, the Russian Federation emerged among the top 12 source markets in Mauritius while no arrivals were registered from that market in 1995. In 1995, Mauritius received 422,463 tourists, 90 per cent of whom originated from only 12 countries but by 2014 the number of tourists reached 1,038,968, with 90 per cent originating from 18 countries. In 2014, the island nation had stretched the range of its source markets widely. 98 per cent of the tourists came from at least 56 different countries and territories, including for example Botswana, Brazil, Canada, Finland, Hungary, Indonesia, Japan,

[8] Reunion Island is a French department but is counted separately in the Mauritian Statistics.

Malaysia, Mozambique, New Zealand, Nigeria, Norway, Philippines, Romania, Saudi Arabia, Singapore, Slovakia, Turkey, Ukraine, United Arab Emirates and Zimbabwe.

Successful diversification in terms of source markets, as the Mauritian experience attests, requires on the one hand, pro-active deliberate policies aimed at increasing airline connectivity between the destination and source markets or between the destination and major international airport hubs and on the other, aggressive marketing campaigns on the part of an active Tourism Promotion Authority. In the case of Mauritius, the deregulation of the airline industry or alternatively the pursuit of an "open skies policy" contributed to increasing the frequency and availability of cheaper flights to Mauritius (Mootien, 2012), a remote island geographically distant from major economic poles. The entry of freedom, low-cost and seasonal charter carriers into the Mauritian airspace allowed new source markets to be tapped into. For instance the coming of Emirates Airlines to Mauritius facilitated the transport of tourists to Mauritius through Dubai, a major international hub serving Europe, Asia and Africa. Russian tourists tend to fly to Mauritius through Dubai. Prior to that, the parastatal national airline company "Air Mauritius", benefiting from state investment and support as the national flag carrier, contributed to the take-off of the tourism industry by operating as a quasi-monopolist and providing frequent air links, matched by good customer service, to major hubs in Europe (London and Paris), Asia (Mumbai, Hong Kong China) and Africa (Johannesburg). The national airline company has always been considered by the State as being instrumental to the implementation of its national tourism development goals. For instance, "Air Mauritius" started to offer direct flights between Mauritius and China (Beijing, Chengdu, Guangzhou, Shanghai) as the Ministry of Tourism was targeting China as a new source market to tap into[9]. The Government of Mauritius is aiming to turn Mauritius into a major international airport hub, acting as an air corridor between Asia and Africa, positioning Mauritius as a gateway to Africa and attracting business tourism. The national carrier as of 2016 inaugurated new weekly flights between Mauritius and Dar-es-Salaam in Tanzania and Maputo in Mozambique. It also runs code sharing arrangements with multiple airlines in Africa (South African Airways and Kenya Airways), Asia (Emirates Airlines) and Europe (Air France). Successful diversification requires in part a close coordination between the Ministry of Tourism, that implements the national tourism development strategy and the Ministry of External Communications and Transport that regulates the transport industry. It is useful to note that in Mauritius both tourism and external communications operate under the same Ministry thereby facilitating coordination across both sectors. The multiplication of partnerships between the national carrier and foreign carriers can also be used as a strategy for increasing air connectivity to the destination.

In the African context, successful source market diversification could be fostered through increased regional and international cooperation. There is a case for African countries to consider deregulating their national airline industries, opening their airspaces to foreign and regional African carriers and engaging in partnerships with regional and international network airlines in a bid to increase accessibility of their countries by air. An effective implementation of the Yamoussoukro Declaration, signed in 1999 by African states and calling for the liberalization of African skies for African airlines, and the establishment of a single African air transport market (by avoiding market restrictions imposed by bilateral air service agreements), is timely as was noted by the African Airlines Association (AFRAA) at its General Assembly in 2014. At a regional level, African countries could widen their source market base by formulating and implementing regional tourism development strategies, that involve developing and offering regional tourism products, engaging in regional marketing, undertaking regional-wide infrastructure upgrade and identifying airports on the continent to be developed into major regional hubs that can increase intra-African travel and outside travel to Africa. Several regional economic communities (RECs) in Africa have developed regional tourism development strategies that remain to be implemented. For example, COMESA[10] has a "COMESA Sustainable Tourism Development Framework" articulated around 12 broad recommendations (including developing a tourism code of conduct for the REC, creating a COMESA single visa, developing positive publicity for the COMESA region, using existing Centers of Excellence within COMESA region to train hospitality industry, creating an e-tourism strategy and policy for the region, promoting COMESA region as a single destination, implementing measures to improve intra-regional air access, creating National Tourism Offices in member states where there is none etc etc). The Inter-Governmental Authority on Development (IGAD), a REC consisting of Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda has for its part developed a Sustainable Tourism Master Plan for the period 2013-2023. Without peace and stability in some of its constituent countries however, it is difficult to foresee how this regional tourism strategy will be implemented. The Eastern African Community (EAC)[11], on

[9] The CEO of Air Mauritius declared in 2013 that "Since we started operations to Shanghai in 2011, tourist arrivals have grown consistently to pass the 20,000 mark in 2012", in reference to arrivals from China (CAPA Center for Aviation, 2013).

[10] 19 African countries are members of COMESA: Burundi, Comoros, D.R.C Congo, Djibouti, Egypt, Eritrea, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Sudan, Swaziland, Uganda, Zambia, and Zimbabwe,

[11] The Eastern African Community (EAC) consists of Burundi, Kenya, Rwanda, Tanzania and Uganda.

the other hand, a forerunner among African RECs when it comes to taking actions, has no formal document outlining a joint tourism strategy for the sub-region but has undertaken various pragmatic initiatives to promote the REC as a single tourism destination (e.g. creation of an East African Tourism and Wildlife Coordination Agency, formation of an East African Tourism Platform with support from TradeMark East Africa, launch of an East African travel magazine, holding of an annual Regional Tourism Wildlife Conference on a rotational basis among EAC states) while the East African Legislative Assembly, based in Arusha, is pushing for the fast-tracking of the EAC One Single Tourist visa to boost tourism in the region. Translating ideas into actions remains a paramount objective for many of these RECs that have already identified policy recommendations for promoting tourism in their region, both at an intra-African level and with the rest of the world.

One good example of regional cooperation in tourism is the "Vanilla islands" concept, promoted by the Indian Ocean Commission (IOC), which is a regional grouping comprised of Comoros, Mayotte (a French Department), Madagascar, Mauritius, Seychelles, and Reunion Island, another French Department. The "Vanilla Islands" concept aims at promoting tourism to the Indian Ocean Islands by among others marketing multi-destination packages. In partnership with "Air Austral", this promotional initiative allows tourists to purchase a "Vanilla Islands Pass" that allows them to combine trips among the Islands at attractive rates when travelling with "Air Austral" and to engage in one-stop shopping on a website that offers inter-island hopping. Offering multi-destination packages, as part of campaigns promoting an entire sub-region in Africa, can be an option for increasing the volume and range of tourists to the continent. These multi-destination packages can combine various "tourism niches" as part of a single attractive and unique tourism product. For instance, under the "Vanilla Islands" concept, tourists can opt for a package of "Madagascar Lemurs+ Mauritius" marketed as a product whereby tourists can enjoy the rich biodiversity of Madagascar through hiking activities, followed by a relaxing beach holiday in Mauritius.

Besides regional cooperation, international cooperation should be harnessed to develop tourism in Africa. One obvious area of cooperation is in air travel through bilateral or multilateral air services agreement that can be signed between governments of African countries and others, pending the full liberalization of African airspace. There is scope for African airlines to increasingly codeshare with international airlines in order to reduce fares and increase connectivity (European Commission, 2007). As an example, the Government of Mauritius signed a bilateral air services agreement with the Government of Maldives in a joint effort to tap into and share the Chinese tourist market. National airlines of both countries operate direct flights between Beijing (and other Chinese cities) and each country as a way of increasing frequency and capacity of flights between China and both Maldives and Mauritius. Air Seychelles has forged a close partnership with Etihad and through a code sharing agreement serves Hong Kong via Abu Dhabi and this allows Seychelles to target tourists from Hong Kong, the rest of China and the Gulf countries.

4.3. Developing "Brand" or Niche Tourism with Local Community Involvement:

Given that the global tourism market is intensely competitive with a large number of potential destinations offering sophisticated products, it is critical for African countries, when defining their tourism strategies and putting in place measures to sharpen their competitiveness, to aim at specific segments of the global tourism market, based on what they can potentially offer and develop in the medium term as advantages. Competitiveness in tourism is multi-faceted and can be framed into a distinct set of advantages: price competitiveness, infrastructure, environmental, technological, industrial organizational, social and exogenous advantages determined by culture, history and geography (Bolaky, 2011). Africa is rich in history, culture, wildlife and heritage, unique to itself, that has so far been insufficiently marketed and transformed as competitive factors for the development of tourism. Successful African tourism destinations such as Mauritius and the Seychelles have capitalized on their natural assets of sun, sand and sea to compete initially in the “beach holiday” segment of the global tourism market and later on in the "wedding honeymoon" segment, Egypt for its part has capitalized on its unique ancient civilization for attracting tourists to its sites while Kenya, South Africa and Tanzania have marketed for instance their natural parks and wildlife to raise their profiles as safari and trekking destinations in the global tourism market (for instance, Serengeti Park in Tanzania, Kruger National Park in South Africa advertising their “Big Five” of the animal kingdom, climbing Mount Kilimanjaro in Kenya). Rwanda is a country that has successfully harnessed its mountain gorillas as a unique attraction to its land (Nielsen and Spenceley, 2011) in order to achieve fast growth in tourism. In many African countries, however, there is a list of natural and cultural heritage sites and abundant wildlife that remain almost hidden and under-marketed for tourism development purposes.

Market segmentation in tourism is widely used as a strategic tool to account for and capitalize on the heterogeneity of tourists and to develop competitive advantages (Dolnicar, 2008). There is scope for many African countries to develop a specific tourism brand and sharpen their tourism image through appropriate slogans, product positioning and targeted marketing campaigns in order to tap into specific segments of the global tourism market; segments such as culture and heritage tourism, adventure sports and nature tourism, community-based tourism and eco-tourism. New market segments[12] could also be identified and harnessed, for example Sierra Leone has made an entry into surf-based tourism while Dominica in the Caribbean, has positioned itself as a film-production site and Vanuatu in the Pacific as a shipwreck diving spot. Abundant rock art caves are a distinct feature of a few Southern African countries and could be better advertised for the historically inclined. Multi-destination packages could be created around a "Wonders of Africa" theme. Such strategies require targeted investment in order to upgrade specific natural, cultural and heritage sites close to local communities; local investment to develop transport, accommodation and amenities close to these sites; training of locals to act as knowledgeable guides, matched by carefully directed advertising and marketing campaigns and the integration of branding and product positioning strategies in national and regional tourism strategies and policies. As mentioned previously, in Africa (Figure 3), only 24 countries have a slogan for their destination reflecting in part their branding strategy. For example, Ethiopia markets itself as a "Land of origins", highlighting its ancient history and "Spirit of originality"[13] while Morocco highlights the diversity of its tourism product, ranging from trekking in snow-capped mountains to desert experiences, relaxing beaches and shopping and cultural experiences with its slogan "MuchMorocco".

African destinations should aim to differentiate themselves from their competitors by adopting a branding strategy that showcases the uniqueness of their natural, historical and cultural heritage. This requires a pro-active collaboration and consultations between the State and major stakeholders of the industry (private investors, travel agents and tour operators, artists, historians, other civil society, local communities, local and international experts, donors and international organizations such as UNESCO and UNWTO) to identify viable and sustainable marketing strategies, based on a range of attractive products. For instance, only 9 per cent of UNESCO's World Heritage sites are in Africa, and out of the 27 countries that have no sites inscribed on the World Heritage List, 13 are in Africa (Angola, Burundi, Comoros, Djibouti, Equatorial Guinea, Eritrea, Guinea-Bissau, Liberia, Rwanda, Sao Tome and Principe, Sierra Leone, South Sudan and Swaziland), reflecting the low priority accorded in some African countries towards valuing and preserving natural, historical and cultural heritage and turning these into marketable assets. Zimbabwe is an example of an African country which has, since 2010, devised a branding strategy based on its rich natural assets, that has allowed it to bounce back as a tourism resort. Zimbabwe won the European Council on Tourism and Trade Best Destination Award in 2014. The country has set aside more than a quarter of its surface area for the conservation of fauna and flora (TradeArabia, 2016). Its slogan "A World of Wonders" captures the marketing strategy of the Government to build a tourism industry around the multiple wonders of Zimbabwe (such as Chinhoyi caves, Hwange National Park, Great Zimbabwe, Mana Pools National Park, Matobo Hills, Zambezi River and Victoria Falls, which is one of the seven natural wonders of the world).

Such "niche market" tourism strategies, aimed at attracting a smaller volume of tourists at the upper income scale should embrace environmental and social sustainability, in addition to economic and financial sustainability (World Bank, 2014). In a continent marked by colonialism, it is crucial for the tourism industry to entertain good working relations with local communities and for foreign tourists to be accepted by the local populations. Such good relations can be forged if local communities have a stake in the development of the tourism industry and if tourism benefits are shared with them. In this context, the participation of locals in consultative diagnostic and decision-making processes and the set-up of income-sharing programs such as Tourism Revenue-Sharing programs could be useful.

Tourism Revenue-Sharing (TRS) programs exist in several areas of Africa and should be scaled up and extended. These programs plough back a share of tourism revenues accruing usually from protected areas into local community development and in return local communities develop a stake in the preservation of these protected areas. TRS can also be set up to compensate local communities from any loss of income that may accrue from restricted access to natural resources due to tourism (for example, access to parks and natural reserves may become restricted). In Rwanda, a country where tourism has grown in economic importance over the last ten years, TRS programs are viewed as an enabler of rural development in terms of poverty alleviation, health promotion and education enhancement. The Rwanda Development Board remits usually about 5 per cent of park entry fees every year to finance various community projects (Kamuzinzi et al, 2015). There is evidence that TRS programs towards local communities have been indeed effective at improving the quality of life of these local communities (for example, Nyungwe National Park in Rwanda (Kamuzinzi et al, 2015)), though they

[12] According to Dolnicar (2008), “Market segmentation is a strategy any entity in the tourism industry can use to strengthen their competitive advantage by selecting the most suitable subgroup of tourists to specialize on and target”.

[13] According to the Ethiopian Tourism Organization, the new tourism brand "Land of Origins" will be the basis to develop stories and messages around Ethiopia's "Spirit of Originality", a land combining an extraordinary past with a dynamic present (Website of Ethiopia's Ministry of Culture and Tourism).

can sometimes be plagued by implementation challenges in practice (for example, Bwindi Impenetrable National Park in Uganda (Tumusiime and Vedeld, 2012)). Attention must be paid to factors that make TRS programs successful and these include: long-term institutional support, appropriate identification of the target community and project type, transparency and accountability, and adequate funding (Archabald, 2001).

Successful penetration in specific tourism "niches" or segments rely on aggressive advertising and marketing campaigns that are based on customer profiling exercises. The Moroccan National Tourism Office for instance sought the expertise of outside agencies to campaign about its "MuchMorocco" brand in the United Kingdom, through the use of print, online and outdoor media. These included digital outdoor panels alongside roads in the UK, posters on trains, gym and fitness centers, multi-page features in mainstream travel publications and specialist titles, digital advertising across holiday search engines and activities on Facebook and online blogs (The Drum,2016). African countries will have to increasingly harness Information and Communications technologies (ICTs) to achieve an effective outreach to targeted customer groups. ICTs have proven to be an effective tool in raising the profile of tourism destinations through digital, social media and effective viral marketing campaigns, and helping firms stay competitive in the tourism market place through increased differentiation and enhanced product image (Dudovski, 2014; Mihalic and Buhalis, 2013).

4.4. Integrating into the Global Tourism Value Chain

The tourism industry, like many other industries, can be characterized as a value-chain. Based on Christian et al (2011), using the international tourist as the reference point, the tourism value chain can be segmented into: a) distribution outside the destination (how the tourist purchases the tourism product), b) international transport to the destination (how the tourist travels to the destination), c) regional distribution and transportation within the destination (how the tourist is transferred to his activities in the destination), d)lodging (how the tourist is accommodated) and e) excursions (the local activities the tourist engages in). African firms should seek to enter and develop competitiveness in each segment of the tourism value-chain, as opposed to getting locked into one only segment of the value-chain. Tourism development policies in Africa should also aim at minimizing import leakages from the sector by encouraging domestic participation in each stage of the value-chain. For example, while foreign direct investment and international partnerships can initially kick-start the development of the industry (with international hotel chains providing accommodation and setting standards and international carriers flying tourists in), over time, tourism policies should promote domestic investment and domestic participation in the sector so as to enable domestic appropriation of the economic benefits of the industry. This necessitates deliberate policies for building linkages and complementarities between the tourism industry and other economic sectors. For example, sourcing inputs from the domestic agricultural and agro-processing sector for the supply of food and beverages to hotels; using local materials from the national construction sector to build hotels that blend with the local landscape; and developing a range of light manufacturing industries to supply locally made art crafts, handicrafts and souvenirs to tourists.

Policies must also be set up so as to facilitate the upgrading of African firms and African destinations along the tourism value-chain. Based on Christian et al (2011), such upgrading can occur simultaneously in multiple segments. These can take the form of a) entry into the tourism value-chain when an African country or an African region becomes an international destination b) adding on tourism products through diversification (source market diversification and diversifying the range of products, through niche segmentation, as mentioned above) c) product upgrading by improving quality of tourism facilities d) functional upgrading along the excursion/distribution segments, with local operators reaching into others segments of the value-chain or taking operations from a local to a regional or global level and e) adopting information technology, with domestic firms and destination management organizations harnessing ICT to engage in web marketing, online sales and social media campaigns etc (Christian et al, 2011).

Investing in ICT infrastructure is an imperative for African countries, given that ICT can significantly enhance their abilities to unlock the development potential of their tourism industries in the twenty-first century and facilitate their insertion into multiple segments of the Tourism Value Chain. In addition, it is estimated that travel planning is among the major factors behind internet use (Buhalis and Hyun Jun, 2011). E-tourism[14] could prove to be a viable tourism business model for African countries. E-tourism can be defined as "the digitisation

[14] "E-tourism determines the competitiveness of the organisation by taking advantage of intranets for reorganising internal processes, extranets for developing transactions with trusted partners and the Internet for interacting with all its stakeholders and customers. The e-tourism concept includes all business functions (i.e., e-commerce, e-marketing, e-finance and e-accounting, eHRM, e-procurement, eR&D, e-production) as well as e-strategy, e-planning and e-management for all sectors of the tourism industry, including tourism, travel, transport, leisure, hospitality, principals, intermediaries and public sector organisations. Hence, e-tourism bundles together three distinctive disciplines: business management, information systems and management, and tourism" (Buhalis and Hyun Jun, 2011).

of all the processes and value chains in the tourism, travel, hospitality and catering industries that enable organisations to maximise their efficiency and effectiveness" (Buhalis, 2003). According to Buhalis and Hyun Jun (2011), "At the strategic level, e-tourism revolutionizes all business processes, the entire value chain as well as the strategic relationships of tourism organizations with all their stakeholders" (Page 6, para.2.). African tourism enterprises need to tap more effectively into e-tourism strategies, in order to establish direct business relations with their final clients, the international tourists, thereby obviating the need for them to go through costly foreign intermediates for the purposes of advertising, marketing, reservations and payments, providing travel insurance, obtaining customer information and customer feedback, personalizing tourism products and communicating with tourism clients. Moreover, as other destinations resort to e-tourism to gain competitive advantage in the global tourism industry, African countries will have no choice but to also engage in innovative and creative use of intelligent e-tourism applications and processes to keep pace (Buhalis and Hyun Jun, 2011)[15]. This however calls for African governments to invest more massively in ICT infrastructure, in ICT education and training among its workforce and to support SMEs in gaining access to and utilize ICTs. E-tourism should not be a neglected area in African national and regional tourism development strategies and policies. The emergence of regional e-destination management systems on the African scene, for example African-based versions of Expedia.com and Hotels.com, specializing in marketing, distributing, and insuring African travel and tourism products along the whole tourism value-chain is an example of a positive development that has yet to arise in the region.

5. Conclusions

This article has highlighted tourism, as an economic and services sector whose full employment and development potential remains to be tapped in Africa. Only 2 African countries depend on tourism for more than 50 per cent of their total exports but for a majority of African countries, tourism accounts for less than 25 per cent of total exports. There is substantial scope for increasing the level of tourist arrivals to Africa from other regions, and diversifying into other source markets. Tourism development in Africa could be pursued within an overall services development strategy that builds complementarities and linkages with other productive sectors such as agriculture and manufacturing and that contributes to jobs and exports. To achieve this, African countries should emphasize the formulation and implementation of policies in four key areas: improving tourism competitiveness, engaging in source market diversification, developing "brand" or niche tourism with local community involvement and integrating into the global tourism value chain. 3 important priorities for African countries for improving upon tourism competitiveness are to (i) invest in hard and soft infrastructure, that is directly linked to the provision of tourism facilities, and to improvements in connectivity (ii) invest in setting up specific tourism facilitation measures and (iii) invest in environmental sustainability and enhance the preservation and promotion of cultural and natural heritage. 37 out 54 African countries have a formulated and official government tourism development strategy or tourism policy or tourism master plan. However, implementing them is a challenge, due to capacity and financing constraints. Tourism Development Funds, fed by ODA, tourism levies, diaspora and philanthropic donations, natural resource rents and private sector contributions could be a financing option. Source market diversification can be promoted through greater regional and international cooperation and an effective implementation of the Yamoussoukro Declaration. There is scope for many African countries to develop a specific tourism brand and sharpen their tourism image through appropriate slogans, product positioning and targeted marketing campaigns in order to tap into specific segments of the global tourism market; segments such as culture and heritage tourism, adventure sports and nature tourism, community-based tourism and eco-tourism. Finally, e-tourism should not be a neglected area in African national and regional tourism development strategies and policies. As other destinations resort to e-tourism to gain competitive advantage in the global tourism industry, African countries will have no choice but to also engage in innovative and creative use of intelligent e-tourism applications and processes to keep pace.

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