CASA ÁFRICA

Tourism in Africa:
A Tool for
Development

Affiliate Members Regional Report: Volume four

Affiliate Members Regional Reports, Volume four – Tourism in Africa: A Tool for Development

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Foreword
by Taleb Rifai,
Secretary General,
World Tourism
Organization
(UNWTO)

Tourism is one of the Africa's most promising sectors in terms of development. In 2014, Africa received 56 million international tourists up from 26 million in 2000. International tourism receipts amount to US$ 36 billion or 7% of all exports in the continent.

Africa has a major opportunity to harness the potential of tourism to foster development and increase its participation in the global economy. In addition, tourism creates opportunities for millions of host communities in Africa and provides revenues for cultural and environmental preservation.

Creating capacity in Africa to develop and manage a competitive tourism offer is thus fundamental. Tourism products are a key pillar in the development of any tourism destination. The range and quality of the tourism product offering defines the competitiveness and attractiveness of tourism destinations and the visitors' experience.

As tourism to Africa evolves to become an increasingly important socio-economic sector, it is essential for countries in the region to adopt effective strategies for tourism product development; strategies than promote a more competitive Africa tourism offer in the marketplace and comply with the need and desires of prospect visitors. UNWTO Regional Programme for Africa and UNWTO Affiliate Members Programme joined forces, with the support of Casa África, to develop the present report, which aims to provide African destinations with the appropriate tools and techniques to assist them in increasing their competitiveness in the current rapidly changing marketplace.

On behalf of UNWTO, I would like to extend our gratitude to all organizations and Member States that have contributed to this report. I trust it will serve as a useful instrument to advance tourism in Africa, recalling that the development of adequate and sustainable tourism products can only be achieved through the cooperative efforts of all parts of the tourism value chain – national and local governments, the private sector and civil society – geared towards an holistic tourism experience.

Foreword
by Luis Padrón López,
General Director of
Casa África

Casa África is a public consortium under the auspices of the Ministry for Foreign Affairs and Cooperation in Spain, with active participation on the part of the Autonomous Government of the Canary Archipelago and the Town Council of Las Palmas de Gran Canaria, the city where the headquarters are based. Our work is to design and set in motion activities of public diplomacy in the fields of economics and culture to bring Spain closer to Africa and vice versa, both at the level of public institutions and at grassroots.

Some six years ago, Casa África began a process of collaboration with UNWTO and FITUR, the International Tourism Fair in Madrid, (Feria Internacional de Turismo de Madrid) to set up INVESTOUR, a professional rendez-vous where Africa is put on the map of world tourism. The aim is simple: to get private and public ventures in Africa connecting and networking not only with Spain but also with the rest of the world.

Spain's know-how in the field of tourism development is unchallenged. Some of the leading names in world tourism development and innovation are Spanish, and thus can be of great aid to our colleagues in Africa.

Our excellent relations with UNWTO Regional Programme for Africa have led us to cement this initiative. In 2014 alone, Africa attracted over 56 million tourists, 5% of the total tourist movement that year. Although things are improving, the numbers are still far from the contribution to the GDP in each of the different nations that tourism can bring.

Both of our organisations lament the dearth of specifically profiled publications that would allow us to build up, year after year, a truer picture of what tourism means and could mean to the African continent, together with the best practices that emerge as guidelines for African countries to follow. This document is designed to change all that.

Spain is convinced that tourism is the way ahead for growth in the whole of the African continent, much as has been the case for Spain (visited by 65 million tourists in 2014). Such was the opinion voiced by the Secretary for Tourism in the latest edition of INVESTOUR.

As can be seen from this report, the expectations could hardly be greater. In less then 15 years, it is hoped that tourist figures will more than double from the 56 million at present, in the whole of the continent, to 130 million.

The goal is clear. Now we have to pave the path toward achieving it. We have to ensure that growth in tourism will really make a palpable difference and will promote inclusive economic growth, for the sector to make a visible and tangible impact on all of the African countries.

We hope here to be laying the foundation stones upon which to build the dream of a future: a future where all the African countries will prosper from the economic growth propitiated by tourism.

Public-private partnerships in Africa: a tool for development

The potential of Africa's tourism remains largely untapped. UNWTO Tourism Highlights 2015 Edition reports that the African region receives only a 3% share in tourism receipts and a 5% share in worldwide arrivals.

If developed effectively, tourism has the potential to accelerate Africa's economic growth and job creation. The sector also has the capacity to contribute significantly to the agenda for social inclusion, as cultural endowments and natural assets can be leveraged to create opportunities for local communities.

Despite the challenges impacting the image of Africa, a proper product development plan will help mitigate the problem and enhance the tourism experience within the region. However, the success of any tourism product cannot be achieved without the participation of all public and private stakeholders. It should involve the active intervention of various government departments and entities together with private sectors.

Against this backdrop, the Affiliate Members Programme of UNWTO is pleased to present the next volume of AM Regional Report, produced in partnership with the UNWTO Regional Programme for Africa and our Affiliate Member Casa África. This Report takes a closer look at the links between tourism product development and its direct application in Africa to provide structural knowledge for the stakeholders. Its relevance lies in its existing best practices, challenges and future opportunities as illustrated through case studies provided by our valued contributors.

The case study contributions included in this report have demonstrated various initiatives implemented to foster continued growth in African tourism. Topics featured in this Report include increased mobility for visitors, human factor as the basis of tourism development, and aviation's key role in tourism development.

We are confident that this Report will facilitate the wider dissemination of knowledge and tools among stakeholders in the field to enhance sustainability in tourism. We hope this will be the beginning of even greater collaboration between public and private entities in our efforts to increase information and enhance the quality of the tourism sector in Africa.

Finally, I would like to thank all the UNWTO Affiliate Members who have participated in this Report, namely IPDT, Cape Town Tourism, IATA, ISITT, Russian International Academy for Tourism and the University of Bologna for their engaging and insightful commentaries. I would also like to thank Casa África for their expertise, support and contribution in this initiative.

Yolanda Perdomo
Director of the Affiliate Members Programme
World Tourism Organization (UNWTO)

Developing tourism in Africa
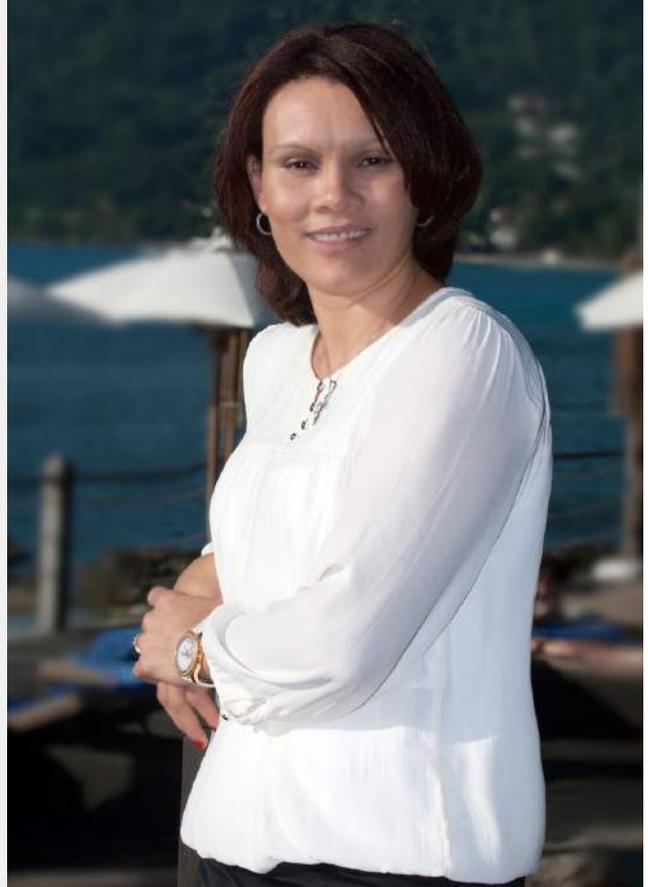
Across the globe, Tourism has evolved as one of the most expansive, diverse and sectors of our times. Now representing one of the largest and fastest growing economic sectors in the world, Tourism contributing 9% of global GDP. Importantly, supporting the livelihoods of 1 in 11 people worldwide, the sector has become a source of immense opportunity and possibility.

Destinations recognising the ability of the sector to transform nations economically, socially and environmentally, and therefore investing in the sector, have enjoyed significant progress, thus demonstrating tourism's role as an essential tool leading to the development, prosperity and well-being of a country′s economy. In Africa, Tourism continues to enjoy sustained growth. In 2014, the continent welcomed 56 million international tourists from 26 million in 2000. International tourism receipts increased by US$ 1 billion last year, reaching US$ 36 billion and accounting to 7% of all exports in the continent.

The African continent is truly adorned with a rich diversity, an abundance of untouched resources, natural beauty, cultural heritage and historical sites, wildlife, safaris, beaches, deserts and much more that, if channelled correctly, could provide considerable opportunities for cultural tourism, eco-tourism, adventure tourism and diaspora tourism.

Despite the above, progress remains unequally distributed. The Northern and the Southern regions of Africa enjoy the majority of tourism arrivals, whereas the balance of the region records less modest increase. That said, it is well understood that the tourism potential in Africa remains untapped, with the possibility to continue to positively, meaningfully and sustainably impact the economy of the continent, acting as a contributor to development, economic growth, employment opportunities, poverty alleviation, investment opportunities and infrastructure development.

Looking to the future and the potential of Tourism on the continent, UNWTO forecasts shows that by 2030 the number of international arrivals in Africa is expected increase by more than a double, growing from 50 million to 134 million, increasing the global market shares of Africa to 7%. Central to unlocking the potential of Tourism in Africa is the joining of hands of partners that share a fundamental confidence in, and commitment to, Tourism on the continent.

UNWTO is honoured to have created this report on tourism development in Africa with a number of our valued partners. A special expression of gratitude goes to Casa Africa, a pillar in unlocking growth potential on the continent. In addition, our thanks is extended to our UNWTO Affiliate Members who participated in the creation of this report, offering invaluable insight and intelligence on this important area of Africa's growth potential. And a warm thanks is extended to our UNWTO Members from across Africa, the champions of Tourism across the continent. As Africa's future unfolds, the continent will no doubt be stronger, as a rich array of destinations, and as one united community, all because of what Tourism will bring to Africa.

Elcia Grandcourt
Director of Regional Programme for Africa,
World Tourism Organization (UNWTO)

Executive summary

Scope of Study

– This study was commissioned by the World Tourism Organization (UNWTO) with the support and close cooperation of Casa África to assess the current situation of Africa's tourism product development.

– It proposes a UNWTO methodology for tourism product development that can be applied to African destinations.

– Recent tourism performance across Africa is analyzed and future prospects are identified, thus demonstrating the importance of a well-defined strategy for tourism product development, so as to explore and leverage the array of opportunities that the international tourism sector offers to African destinations.

– It further discusses the prospects and challenges of tourism development for African nations, describes a specific approach for developing unique tourism products and presents case studies of specific projects that are helping shape Africa's tourism context.

Portée de l'étude

– *Cette étude a été commandée par l'Organisation mondiale du tourisme (OMT) avec le soutien et l'étroite collaboration de Casa África pour faire le point sur le développement de produits touristiques en Afrique.*

– *Il y est proposé pour le développement de produits touristiques une méthodologie de l'OMT qui peut s'appliquer aux destinations africaines.*

– *Le document comporte une analyse des résultats récents du tourisme à travers l'Afrique et un recensement des perspectives d'avenir, qui mettent en évidence l'importance d'une stratégie de développement de produits touristiques bien définie pour pouvoir explorer et exploiter les multiples possibilités que le secteur du tourisme international ouvre aux destinations africaines.*

– *Il y est également question des perspectives et des enjeux que présente le développement du tourisme dans les pays d'Afrique, avec la description d'une approche spécifique pour la mise au point de produits touristiques originaux, et la présentation d'études de cas sur des projets précis qui aident à dessiner le contexte touristique de l'Afrique.*

Africa's tourism - current situation and future prospects

– Africa has been one of the world´s fastest growing tourism regions, growing a small base of just 14.7 million visitors in 1990, to 26 million international tourists in 2000 and 56 million in 2014.

– International tourist arrivals in Africa are estimated to have increased by 2% in 2014. In absolute terms, the region welcomed a total of 56 million international tourists.

– Africa's 2% rise however represents a clear slowdown on tourism demand after years of solid growth.

– International tourism receipts (+3%) increased by US$ 1 billion to reach US$ 36 billion. The region maintained a 5% share in worldwide arrivals and a 3% share in tourism receipts.

– In North Africa (+1%), international tourist arrivals in leading destination Morocco grew by a modest 2%, following a strong performance in the previous year, while arrivals in Tunisia decreased by 3%.

– Sub-Saharan Africa grew by an estimated 3% in 2014, based on available information

– Arrivals to the sub region's largest destination South Africa (+0%) were flat in 2014. Worth mentioning among

Le tourisme en Afrique – situation actuelle et perspectives d'avenir

– *L'Afrique est une des régions du monde où le tourisme a connu les plus fortes croissances, partant d'une faible base, de seulement 14,7 millions de visiteurs en 1990, pour grimper à 26 millions de touristes internationaux en 2000 et à 56 millions en 2014.*

– *Selon les estimations, le nombre d'arrivées de touristes internationaux en Afrique a augmenté de 2 % en 2014. En valeur absolue, la région a accueilli au total 56 millions de touristes internationaux.*

– *Cette hausse de 2 % représente toutefois un net ralentissement de la demande touristique après des années d'une croissance soutenue.*

– *Les recettes du tourisme international (+3 %) ont crû d'un milliard de dollars EU pour atteindre 36 milliards. La région a maintenu à 5 % sa part des arrivées dans le monde et à 3 % sa part des recettes touristiques.*

– *En Afrique du Nord (+1 %), les arrivées de touristes internationaux dans la première destination, le Maroc, ont progressé de seulement 2 %, après avoir affiché un très bon résultat l'année précédente, tandis que la fréquentation en Tunisie a fléchi de 3 %.*

– *Selon les estimations actuelles, l'Afrique subsaharienne aurait enregistré une hausse de 3 % en 2014.*

the other destinations for which data is reported are Côte d'Ivoire (+24%), Madagascar (+13%), Mauritius (+5%), Zimbabwe (+3%) and the Seychelles (+1%).

– While many countries in Africa benefited from strong economic growth in their tourism sector, the continent´s share of worldwide tourism receipts is relatively modest.

– **Tourism creates jobs and stimulates SME (Small and Medium Sized Enterprise) growth.** In 2014 it represented 9% of world GDP - direct, indirect and induced impact.

– **Tourism is one of the fastest growing sectors of the world economy.** International tourism has shown almost uninterrupted growth since the 1950s and has almost doubled over the past decade.

– **Tourism shows particular promise for developing countries.** Tourism is growing faster in the world's emerging and developing regions than in the rest of the world.

– **Tourism accelerates reform.** Tourism is a beacon for pro-business policies and reforms that can help SME development and stimulate foreign investment.

Tourism product development – key concepts and destination context

– Tourism product development is a process whereby the assets of a particular destination are molded to meet the needs of national and international customers.

– The tourism product can include natural or man-made attractions, hotels, resorts, restaurants, theaters, activities, festivals and events or a portfolio of things for visitors to see and do.

– Tourism product development is not an activity undertaken in a vacuum, but is part of an extensive and inter-related process.

– Market research, product development and marketing represent a continuum. The failure to deliver any of these key components will result in the destination under-realizing its potential.

– As tourism provides opportunities for SMEs (small and medium enterprises) many governments provide incentives to encourage the tourism product development.

– *La courbe des arrivées dans la plus grande destination de la région, l'Afrique du Sud (+0 %), est restée plate en 2014. Parmi les autres destinations pour lesquelles on possède des chiffres, la Côte d'Ivoire (+24 %), Madagascar (+13 %), Maurice (+5 %), le Zimbabwe (+3 %) et les Seychelles (+1 %) méritent une mention.*

– *Si le secteur touristique de nombreux pays d'Afrique a profité d'une forte croissance économique, la part des recettes touristiques mondiales qui revient au continent est relativement modeste.*

– ***Le tourisme crée des emplois et stimule la croissance des PME (petites et moyennes entreprises).*** *En 2014, il a représenté 9 % du PIB mondial – effets directs, indirects et induits.*

– ***Le tourisme est un des secteurs les plus dynamiques de l'économie mondiale.*** *Le tourisme international affiche une croissance quasi ininterrompue depuis les années 1950 et a presque doublé au cours de la dernière décennie.*

– ***Le tourisme semble particulièrement prometteur pour les pays en développement.*** *Le tourisme croît plus rapidement dans les régions émergentes et en développement de produits touristiques que dans le reste du monde.*

– ***Le tourisme accélère les réformes.*** *Le tourisme est une source d'inspiration pour les politiques favorables aux entreprises et les réformes qui peuvent aider le développement de produits touristiques des PME et stimuler l'investissement.*

Développement de produits touristiques – concepts de base et contexte des destinations

– *Le développement de produits touristiques est un processus par lequel les atouts d'une destination particulière sont modelés de manière à satisfaire les besoins des clients nationaux et internationaux.*

– *Le produit touristique peut inclure des éléments naturels ou artificiels, des hôtels, des complexes touristiques, des théâtres, des restaurants, des activités, des festivals et autres manifestations, ou un ensemble de choses à voir et à faire pour les visiteurs.*

– *Le développement de produits touristiques n'est pas une activité menée en vase clos mais s'inscrit dans un processus large dont les éléments sont liés entre eux.*

– Some attractions or facilities are included in tourism development policies with plans increasingly geared to meet specific socio-economic objectives. These objectives can be as varied as attracting inward foreign investment, generating local level economic impacts in the form of SMEs and/or community tourism, boosting economic development in certain regions of the destination or reducing the seasonal imbalance to minimizing damaging environmental or socio-cultural impacts on the destination and its resident population.

– Another significant reason why destination authorities support tourism product development is to improve the provision of facilities so that the local population can also enjoy, thereby improving their quality of life.

Fundamentals and principles of tourism product development

– Three fundamental issues for which all destination authorities should consider which are the structures within organizations, inter-government agency coordination and establishing a planning system and process to include the state, private sector and the communities where tourism takes place.

– Product development must be in line with the tastes and trends of the market which is subject to a range of influences such as marketing and promotional campaigns.

– The tourism product development strategy depends on the nature of resources available, whether it's a flagship attraction or a cluster of minor attractions.

– The use of festivals and other mega events is an alternative strategy that attracts visitors to a destination which may not have any significant attraction or during low seasons.

– There are steps in the planning process to discover the potential for tourism product development and turning the opportunities into successful developments that meets the market demands.

– This process involves three stages of establishing the present situation, identifying the opportunities for development and prioritizing the destination´s tourism objectives.

– Les études de marché, le développement de produits et le marketing représentent un continuum. Faute de livrer l'une quelconque de ces composantes clés, la destination sous-exploitera son potentiel.

– Le tourisme offrant des débouchés aux PME, de nombreux gouvernements utilisent des moyens d'incitation pour encourager le développement de produits touristiques.

– Certains lieux ou certaines installations sont intégrés aux politiques de développement du tourisme selon des plans de plus en plus guidés par des objectifs socio-économiques précis. Ces objectifs peuvent être très variés : attirer des investissements étrangers, produire des retombées sur l'économie locale sous la forme de PME ou d'un tourisme communautaire, doper le développement économique dans certaines régions de la destination ou réduire les variations saisonnières pour limiter les dommages environnementaux ou les répercussions socio-culturelles dans la destination et chez ses habitants.

– Une autre raison pour laquelle les autorités d'une destination soutiennent le développement de produits touristiques est la volonté d'améliorer l'offre d'équipements pour que la population locale puisse en profiter elle aussi et ainsi jouir d'une meilleure qualité de vie.

Éléments fondamentaux et principes du développement de produits touristiques

– Les autorités de toutes les destinations doivent prêter attention à trois points fondamentaux, qui sont la structure interne des organisations, la coordination gouvernementale inter-institutions, et l'établissement d'un système et d'un processus de planification qui intègrent l'État, le secteur privé et les collectivités où se situent les activités touristiques.

– Le développement de produits doit être adapté aux goûts et tendances du marché, lequel est soumis à toutes sortes d'influences comme les campagnes de marketing et promotionnelles.

– La stratégie de développement de produits touristiques dépend de la nature des ressources disponibles, selon que l'on a affaire à une attraction phare ou à un ensemble d'attractions de second rang.

– L'organisation de festivals ou d'autres grandes manifestations constitue un recours pour attirer des

– There are tools that aid in the process of analyzing namely, PEST[1] analysis, SWOT[2] analysis, TALC[3] analysis, Ansoff matrix and the BCG[4] matrix.

– After identifying the destinations competitive position and its possible future development and directions, the destination can identify the possible priorities of the products they seek to develop as it relates to the economic and socio-economic benefits.

A methodology for tourism product development in Africa

– There are certain key principles in the process of tourism product development planning that can be illustrated through what might be called 'a model destination'. This may not relate to any specific destination but is drawn in such a way that many destinations can share some, if not several of the characteristics which might define the model.

– The model destination is characterized by being in the growth phase of the Tourism Area Lifecycle facing issues of broadening both its product and market mix; being helped through a good level of government support but; hampered by limitations both on manpower and financial resources; and concerns about environmental and socio-cultural impacts in parts of the destination.

– There is also a broader spectrum of a model destination which outlines specific characteristics such as location/access, existing resources, tourism performance, government and tourism policies, the local economy and its human capital.

– Tourism product development does not start from nothing as destinations have existing institutional infrastructure, plans, policies and procedures which development in the tourism sector can fit, however there are limitations in financial resources and intellectual capabilities. The UNWTO Affiliate Members Programme developed a methodology to help destinations develop their tourism product strategy: the 'Prototype methodology'

visiteurs dans une destination qui ne présente peut-être pas beaucoup d'intérêt pendant la basse saison.

– Le processus de planification se déroule en plusieurs étapes qui permettent de découvrir le potentiel qui existe pour le développement de produits touristiques et de mettre à profit ces possibilités pour répondre à la demande du marché.

– Le processus se compose de trois étapes : faire le point sur la situation en vigueur, définir les possibilités de développement et hiérarchiser les objectifs de la destination en matière de tourisme.

– Certains outils peuvent faciliter le processus d'analyse, notamment l'analyse PEST[1], l'analyse SWOT[2], l'analyse TALC[3], la matrice Ansoff et la matrice BCG[4].

– Après avoir déterminé sa position concurrentielle ainsi que ses perspectives d'avenir et son évolution future, la destination pourra définir la priorité éventuelle des produits qu'elle a l'intention de développer par rapport à leurs retombées économiques et socioéconomiques.

Méthodologie proposée pour le développement de produits touristiques en Afrique

– Il existe certains principes de base concernant la planification du développement de produits touristiques, qui trouvent une illustration dans ce que l'on pourrait appeler « destination modèle ». Elle ne décrit pas nécessairement une destination particulière mais est conçue de telle manière qu'un grand nombre de destinations puissent partager une ou plusieurs des caractéristiques susceptibles de définir le modèle.

– La destination modèle se caractérise comme suit : elle connaît une phase d'extension du cycle de vie des zones touristiques qui l'oblige à élargir la gamme de ses produits et de ses marchés ; elle bénéficie d'un bon soutien des pouvoirs publics mais est gênée par une limitation de ses ressources humaines et financières ; et certains secteurs de la destination s'inquiètent des incidences environnementales et socioculturelles.

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1. Political, Economic, Social and Technological.
2. Strengths, Weaknesses, Opportunities and Threats.
3. Tourist Area Life Cycle.
4. Boston Consulting Group.

1. Politique, économique, sociale et technologique.
2. Atouts, faiblesses, opportunités et menaces.
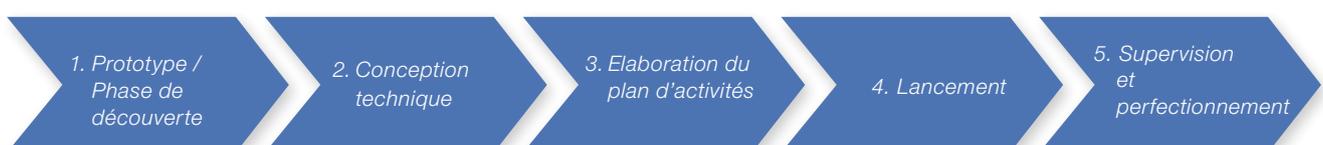3. Cycle de vie d'une zone touristique.
4. Boston Consulting Group.

– The Prototype methodology assists destinations and the private sector in finding solutions to specific issues in developing private and public initiatives whose main goal is to drive economic and social growth.

– All projects derived from this Prototype methodology under UNWTO are required to comply with the Global Code of Ethics for Tourism to maximize tourism's socio-economic contribution while minimizing its possible negative impacts. In respect to the methodological approach, it follows a 5-phase approach, with a series of activities as follows:

– *Il s'y ajoute un cadre plus large pour définir une destination modèle qui décrit des caractéristiques précises comme la situation ou l'accès, les ressources existantes, les résultats du secteur touristique, les politiques gouvernementale et touristique, l'économie locale et son capital humain.*

– *Le développement de produits touristiques ne se fait pas à partir de rien car il existe dans les destinations une infrastructure institutionnelle, des plans, des politiques et des procédures auxquels le développement du secteur touristique peut s'adapter ; en revanche, les ressources financières et le potentiel intellectuel sont limités. Une méthodologie a été conçue dans le cadre du Programme des Membres affiliés de l'OMT pour aider les destinations à mettre au point leur stratégie relative aux produits touristiques : la Méthodologie du prototype.*

– *La Méthodologie du prototype aide les destinations et le secteur privé à trouver des solutions à des problèmes précis posés par le développement d'initiatives privées et publiques qui ont principalement pour fin de stimuler la croissance économique et sociale.*

– *Tous les projets inspirés de cette méthodologie et menés sous l'égide de l'OMT doivent se conformer au Code mondial d'éthique du tourisme pour qu'ils puissent optimiser la contribution socioéconomique du tourisme tout en limitant ses éventuelles retombées négatives. S'agissant de l'approche méthodologique suivie, elle se compose de cinq étapes assorties de diverses activités :*

Figure 4.1 UNWTO Prototype methodology

1. Prototype / Discovery phase → 2. Technical design → 3. Business plan development → 4. Going live → 5. Supervision and improvement processes

Figure 4.1   Méthodologie du prototype de l'OMT

1. Prototype / Phase de découverte → 2. Conception technique → 3. Elaboration du plan d'activités → 4. Lancement → 5. Supervision et perfectionnement

Future outlook and recommendations

– Tourism is one of the key industries driving the change in the continent of Africa and it provides multiple opportunities for economic growth and improved livelihoods. Among the reasons to develop tourism we can find the creation of jobs, regional economic development, improvement of infrastructure, increasing domestic consumption and exports diversification, cultural heritage and environmental preservation, empowerment of women, the youth and marginalized people, amongst others.

– Africa's private sector is increasingly attracting investment, with much of the funding coming from Europe and the United States of America. Returns to investment in Africa are among the highest in the world.

– To explore these opportunities, it is essential that African countries adopt clear strategies based on suitable methodologies for tourism product development. Therefore, the basis of the prototype offered in this publication will offer African and Sub-African destinations tools, techniques and a unique methodology to help enhance their competitiveness in today's global tourism sector.

– There are some basic principles which serve as a basis for tourism product development. These are recommendations which can be implemented to help ensure successful development and mitigate risks of developing products which is unsuitable to the target market or even worse draws the wrong target market:

    – Understanding market tastes and trends – market research;

    – Market: product 'matching';

    – Designating tourism development areas/zones;

    – Undertaking extensive stakeholder consultation – including with the local communities in the areas of development – in an open manner and in a spirit of co-operation;

    – Pursuing flagship development opportunities;

    – Identifying opportunities for clusters, circuits and events;

Perspectives d'avenir et recommandations

– *Le tourisme est une des principales industries porteuses de changement sur le continent africain et offre de multiples possibilités pour la croissance économique et l'amélioration des conditions de vie. Entre autres raisons justifiant le développement du tourisme, citons la création d'emplois, l'essor économique régional, la modernisation des infrastructures, l'augmentation de la consommation locale et la diversification des exportations, la préservation du patrimoine culturel et de l'environnement, l'émancipation des femmes, des jeunes et des personnes marginalisées, etc.*

– *Le secteur privé de l'Afrique attire de plus en plus d'investissements, qui proviennent essentiellement de l'Europe et des États-Unis d'Amérique. Le rendement des investissements figure parmi les plus élevés du monde.*

– *Pour explorer ces possibilités, il est primordial que les pays d'Afrique adoptent des stratégies claires fondées sur des méthodologies adaptées au développement de produits touristiques. Par conséquent, les éléments de base du prototype proposé dans cette publication offriront aux destinations du continent et de l'Afrique subsaharienne des outils, des techniques et une méthode unique dont ils pourront s'aider pour renforcer leur compétitivité dans le secteur du tourisme mondial actuel.*

– *Quelques principes de base servent de fondement au développement de produits touristiques. Ce sont des recommandations que l'on pourra appliquer pour que ce développement soit réussi et pour limiter le risque de développer des produits qui seront inadaptés au marché visé ou, pire, qui ne s'adresseront pas au bon marché :*

    – *Comprendre les goûts et tendances des marchés – étude de marché ;*

    – *Mettre en adéquation les marchés et les produits ;*

    – *Désigner des zones pour le développement du tourisme ;*

    – *Consulter abondamment les parties prenantes – y compris les collectivités locales dans les zones de développement – d'une manière ouverte et dans un esprit de coopération ;*

– Preparing a full product portfolio and investment plan;

– Ensuring that personnel with the appropriate tourism technical skills are in place at national, regional and local levels to carry the process of tourism product development forward; and

– Drawing up a marketing and promotion strategy to support the tourism product developments, and implement a program of marketing communications.

Best practices in tourism product development and destination success in Africa

■ To highlight some of the best practices in tourism product development in Africa, a series of case studies have been selected. These cases further illustrate real world success stories which can be drawn on to help chart the course forward for tourism product development in other African destinations.

– *Saisir les possibilités de développer des produits phares ;*

– *Recenser les possibilités de grouper des produits, de monter des circuits et d'organiser des manifestations ;*

– *Constituer un portefeuille de produits complet et préparer un plan d'investissement ;*

– *S'assurer que l'on dispose sur place d'un personnel doté de compétences techniques appropriées en matière de tourisme aux niveaux national, régional et local pour que le processus de développement de produits touristiques puisse aller de l'avant ; et*

– *Mettre au point une stratégie de marketing et de promotion pour faciliter le développement de produits touristiques, et mettre en œuvre un programme de communications commerciales.*

Les meilleures pratiques suivies pour le développement de produits touristiques et les destinations qui réussissent en Afrique

– Plusieurs études de cas ont été choisies pour mettre en évidence certaines des meilleures pratiques suivies pour le développement de produits touristiques en Afrique. Ces cas illustrent des réussites constatées dans la vie réelle dont on pourra s'inspirer pour jeter les bases du développement de produits touristiques dans d'autres destinations africaines.

INVESTOUR

Encouraging exchanges on investment and business opportunities in Africa

The Tourism Investment and Business Forum for Africa – INVESTOUR – is a joint initiative by the World Tourism Organization (UNWTO), Casa Africa, representing the Spanish Government, and the International Tourism Fair of Madrid (FITUR).

The main objective of the Forum is to promote the development of sustainable tourism in Africa by encouraging exchanges on investment and business opportunities in the region. Each new edition of INVESTOUR has been an opportunity to introduce new features. Initially opened to representatives of African national tourism administrations, the Spanish Government and Spanish private-sector actors, the Forum was expanded last year to welcome the participation of Portuguese companies.

FITUR is one of the world's most important tourism fairs, and in this context, INVESTOUR, and the working lunch of the Ministers of Tourism of Africa and the Middle East, is an excellent opportunity to showcase African tourism.

Over the years, INVESTOUR has proven to be an essential gathering for the promotion of tourism development in Africa, and to showcase the immense investment and business opportunities existing in the region.

INVESTOUR has grown and expanded to attract an increasing number of participants and potential investors. The success of past editions has been largely due to the continuous support and attendance of its Members. INVESTOUR is, not only a unique business platform, but also an exceptional opportunity for potential investors to meet with policy makers. The high level participation of Tourism event but it is also a clear demonstration of the importance that tourism leaders attach to the role of tourism as a catalyst for socio-economic development.

Over the years

Since its launch in January 2010, INVESTOUR has become a key event of FITUR. In four years, the total number of participants has almost doubled – from 160 in 2010 to 269 in 2014. The event has also gained increased public recognition, welcoming each year among which several Ministers from the region. The high number of projects presented at the B2B session – above 100 – is another indicator of the positive output of the forum. Previous editions have covered themes ranging from hotel infrastructure, air connectivity, visa facilitation, product development and capacity building. The 6th edition, beyond Spanish and Portuguese companies, will focus on the impact of Africa's image on Foreign Direct Investment (FDI) and on Human Capital.

© Curiosopl | Dreamstime.com - Traditional Food Market In Zanzibar, Africa.
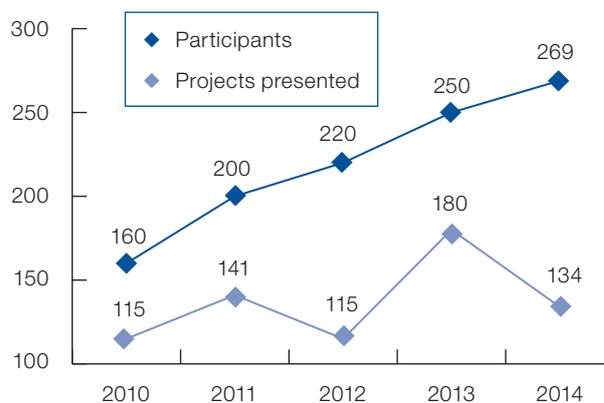
INVESTOUR 2016

The 7th edition of the Tourism Investment and Business Forum for Africa (INVESTOUR) will take place on **21 January 2016** at the International Travel Trade Fair (FITUR), hold in Madrid.

The structure of this important event is organized in two sessions: The first one is devoted to round tables and the second session consists of business-to-business (B2B) meetings. This constitutes a strategic platform that puts African tourism project leaders and potential international partners in direct contact with one another.

The projects will be focused on the following areas:

– Tourism project financing and investments;

– The transfer of technology and know-how in the hotel business and tourism sector;

– Ecotourism operations in national parks and protected areas;

– The promotion and representation of destinations in the international outbound market;

– The creation and improvement of hotel establishments;

– The promotion of cultural tourism; and

– Infrastructure and transport.

| Figure 1 | Total number of participants and projects presented in INVESTOUR since 2010 |

Source: World Tourism Organization (December 2014).

UNWTO
Affiliate Members

Enhancing public-private sector collaboration in tourism

The UNWTO Affiliate Members offer:

·A wide range of opportunities for public-private collaboration
·An international platform to interact with governments from all over the world
·A framework to connect interest groups
·An opportunity to be part of the UN work
·A space to generate innovative products

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World Tourism Organization (UNWTO)
A Specialized Agency of the United Nations

Introduction

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This report relates to the current situation of Africa's tourism and a proposed UNWTO methodology for tourism product development that can be applied to African destinations. It discusses the prospects and challenges of tourism development for African nations, describes a specific approach for developing unique tourism products and presents case studies of specific projects that are helping shape Africa's tourism context. The Report is organized into five chapters, covering the following themes:

– **African tourism – Current situation and future prospects:** recent tourism performance across Africa is analyzed and future prospects identified, thus demonstrating the importance of a well-defined strategy for tourism product development, so as to explore the array of opportunities that the international tourism sector offers to African destinations.

– **Tourism product development – Key concepts and destination context:** the key concepts of tourism product development are presented and analyzed and a working definition is proposed. The tourist destination is defined and its characteristics explained. The variables influencing tourism product development are also provided and analyzed.

– **Fundamentals and principles of tourism product development:** aspects to put in place before effective tourism product development are presented. Principles and procedures of tourism product development are also discussed. It concludes by prioritizing the destination's tourism product development objectives.

– **A methodology for tourism product development in Africa:** the characteristics and features of a model destination are listed and illustrated. The UNWTO Prototype methodology for tourism product development is defined and its phases explained.

– **Best practices in tourism product development and destination success in Africa:** the final chapter presents a series of case studies related to tourism product development in Africa, thus illustrating some of the key points introduced and discussed along the Report.

1.
African tourism

1.1 African tourism: current situation and future prospects

While tourism has established itself as a vehicle for economic growth and job creation in the world, it is an under-developed opportunity in Africa according to World Bank (2011).

As a result, there are long-term opportunities for growth, as reported in McKinsey's 2010 study, *Lions on the Move.* Here, it is suggested that across Africa, new economic partnerships are being forged, foreign investment is on the rise, and access to international capital is increasing. Growth in GDP per capita has resulted in the emergence of a new middle-class of African consumers with discretionary income. As such and under the right conditions, the tourism sector can take advantage of these opportunities and thrive.

According to UNWTO Barometer (volume 13, April 2015), international tourism receipts grew in all regions, with Africa growing (3% share) by USD 1 billion to USD 36 billion (EUR 27 bn).

Africa and Middle East recorded the highest increase in occupancy across world regions (+2.3% - percentage points) according to STR Global, though it is still below other regions (63.3%). Average Daily Rate (ADR) rose 1% to USD 166, and RevPAR (Revenue per Available Room) climbed 5% to USD 105.

North Africa outperformed most markets in both the Middle East and Sub-Saharan Africa with an increase of 5.4% percentage points in occupancy, however, to a comparatively low 51.9%. ADR increased by 3% and RevPAR by 15% in this subregion, driven primarily by the recovery in Egypt.

Average occupancy in the region is still relatively low compared with other parts of the world. However, slow supply growth coupled with increasing demand in recent years has led to an improvement in occupancy, according to STR Global.

Receipts grew faster than arrivals in Africa (respectively +3.3% and +1.8%), while Worldwide, international tourism receipts grew somewhat slower than arrivals: 3.7% measured in real terms.

Africa remains robust with growth expected to reach 4.2% in 2015. North Africa is forecast to grow by 3.1% while in Sub-Saharan Africa, growth remains strong but is expected to slow this year to 4.5% in the face of headwinds from declining commodity prices and the epidemic in Ebola-affected countries. Especially oil-exporter Nigeria is experiencing slower growth of 4.8% in 2015, as opposed to 6.3% reported in 2014.

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Africa: weaker growth in most destinations

International tourist arrivals in Africa are estimated to have increased by 2% in 2014. In absolute terms, the region welcomed a total of 56 million international tourists. International tourism receipts (+3%) increased by USD 1 billion to reach USD 36 billion. These figures should be interpreted with caution, as results are still based on the comparatively limited data available so far. The region maintained a 5% share in worldwide arrivals and a 3% share in tourism receipts.

In North Africa (+1%), international tourist arrivals in leading destination Morocco grew by a modest 2%, following a strong performance in 2013, while arrivals in Tunisia decreased by 3%.

Sub-Saharan Africa grew by an estimated 3% in 2014, based on available information. Arrivals to the subregions largest destination South Africa (+0%) were flat in 2014. Worth mentioning among the other destinations for which data is reported are Côte d'Ivoire (+24%), Madagascar (+13%), Mauritius (+5%), Zimbabwe (+3%) and the Seychelles (+1%).

Source: World Tourism Organization (2015) *Tourism Highlights*.

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1.2 Trends and recent performance in African Tourism

Since 2000, international arrivals to Africa have increased by 29.5%. Growth has been more significant in Sub-Saharan Africa – up 19.9% since 2000. Growth in North Africa has been slower, up 9.6% since 2000.

In 2014, Africa attracted 55.7 million international tourist arrivals out of 1,133 billion arrivals, representing 4.9% of the world's inbound tourism.

Table 1.1 International tourist arrivals to Africa (million)					
	2000	**2005**	**2010**	**2013**	**2014**
Africa	26.2	34.8	49.5	54.4	55.8
North Africa	10.2	13.9	18.8	19.6	19.8
Sub-Saharan Africa	16.0	20.9	30.8	34.7	36.0

Source: World Tourism Organization (2015) Barometer.

Figure 1.1 International tourist arrivals to Africa (million)
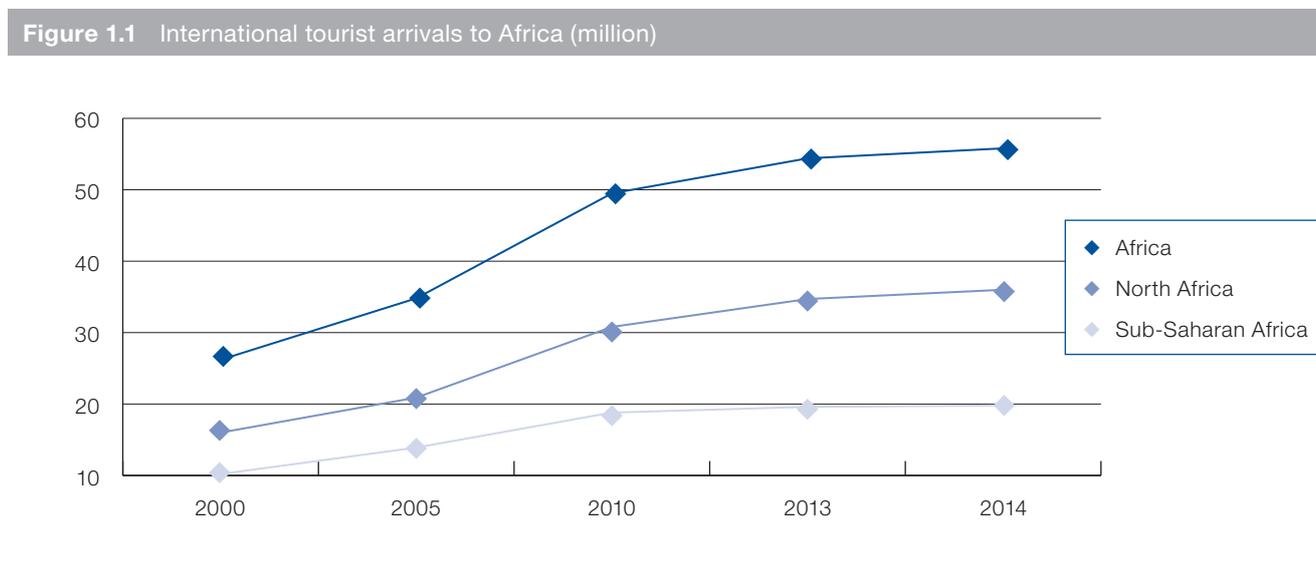
Source: World Tourism Organization (2015) Barometer.

In North Africa, tourism results since 2010 were negatively affected by the Arab spring, having recorded a minimum growth in the last four years. On the other hand, Sub-Saharan Africa increased by more than 5 million tourists, boosting Africa's modest growth over the last years. In 2014, the region maintained a 5% share in worldwide arrivals and a 3% share in tourism receipts.

North Africa grew by an estimated 1% in 2014 and international tourist arrivals in leading destination Morocco grew by 2% in 2014, following a strong performance in 2013, while arrivals in Tunisia decreased by 3%.

Sub-Saharan Africa grew by an estimated 3% in 2014. According to available data, Côte d'Ivoire (+24%) and

Madagascar (+13%) reported strong growth, however, arrivals to South Africa, the subregion's largest destination, were flat in 2014.

Modest growth rates –

The volume of international arrivals to Africa grew by 5% from 2010 to 2014.

*Sub-Saharan Africa performed better than the north of Africa.*

1.2.1. Tourism contribution to employment

The importance of tourism to employment in Africa is growing. While in 2000 the sector accounted only for 11,600 jobs in the region, this number went up to 20,500 in 2014 (8.1% of total employment in the region). Between 2008 and 2011 the number of jobs decreased but since then it has been increasing every year. According to World Travel and Tourism Council (WTTC), tourism´s total contribution to employment is expected to grow to 26,000 in 2015. As for tourism direct contribution to employment, the progress has been similar and from 2000 to 2014 the region gained almost 3,500 new jobs directly related to tourism (see figure 1.2).

1.2.2 Tourism spending

Leisure tourism is responsible for most of the tourism expenditure in Africa. Results increased from USD 50.8 billion in 2000 to USD 95.9 billion in 2014. Forecasts indicate that in 2025 it will reach USD 160.9 billion. As for business tourism this is expected to increase to USD 69.9 billion in 2025 (see figure 1.3).

Figure 1.2 Tourism contribution to employment in Africa (jobs in thousands)
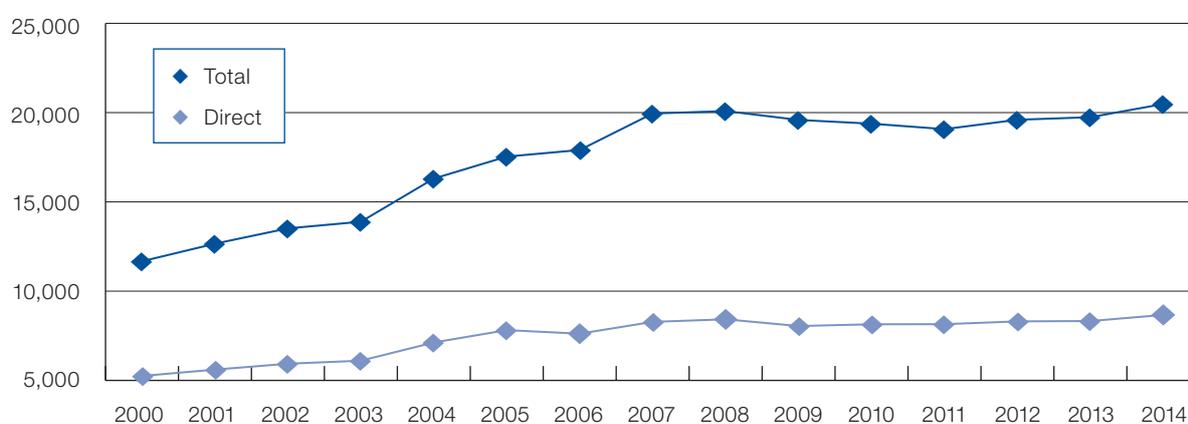
Source: World Tourism Organization (2015).

Figure 1.3 Tourism spending (USD billion)
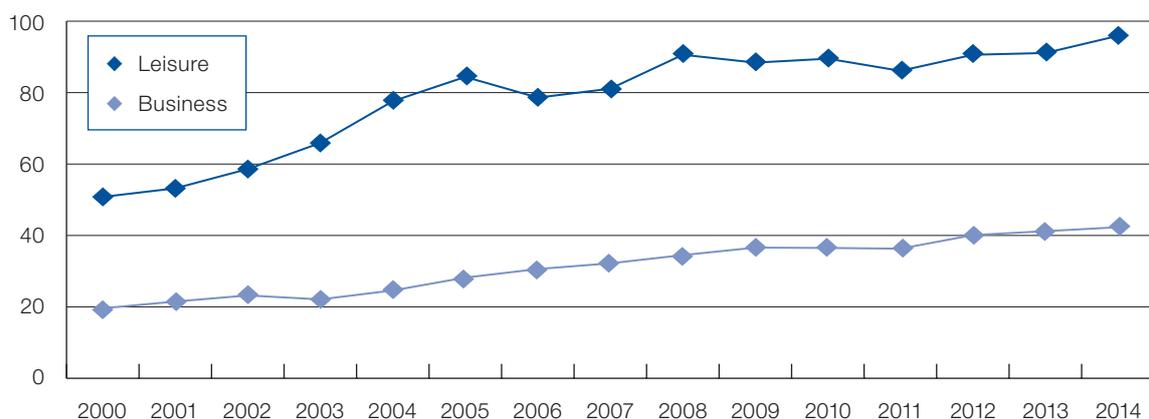
Source: World Tourism Organization (2015).

Figure 1.4 International tourism 2014

International tourist arrivals (ITA): 1133 million
International tourism receipts (ITR): US$ 1246 billion

AMERICAS
ITA: 181 million (16%)
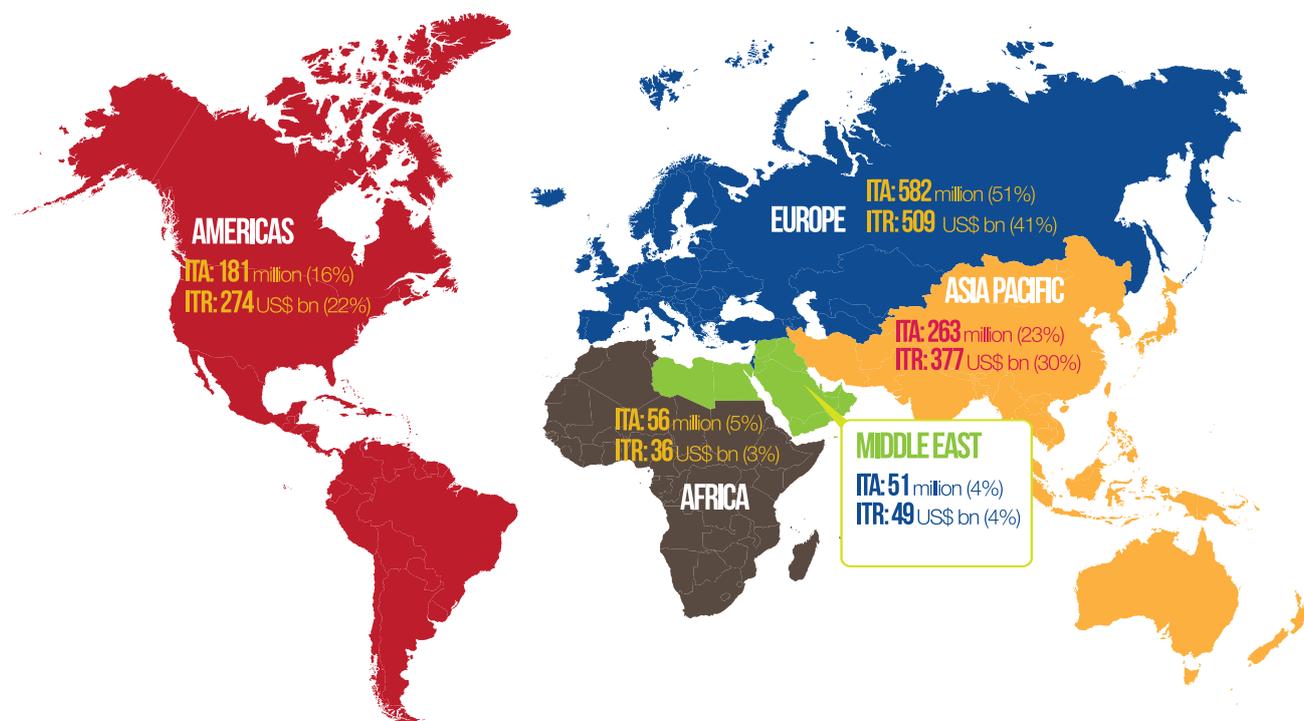**ITR: 274** US$ bn (22%)

EUROPE
ITA: 582 million (51%)
ITR: 509 US$ bn (41%)

ASIA PACIFIC
ITA: 263 million (23%)
ITR: 377 US$ bn (30%)

ITA: 56 million (5%)
ITR: 36 US$ bn (3%)
AFRICA

MIDDLE EAST
ITA: 51 million (4%)
ITR: 49 US$ bn (4%)

Source: World Tourism Organization (2015), *Tourism Highlights.*

1.2.3 2014 Africa tourism performance

In economic terms, many countries in Africa, especially in Sub-Saharan Africa, have benefitted from strong growth in their tourism sector in recent years. However, despite the economic importance of tourism, the continent's share of the worldwide tourism market is relatively modest.

To help change this apparent paradox, the World Bank developed the *Africa Region Tourism Strategy (2011),* for African countries to take advantage of their natural and cultural tourism assets so as to build economically productive and sustainable tourism sectors.

The importance of a tourism based strategy for Africa is clearly confirmed by the role played by the sector in the world as well as in the region:

– **Tourism creates jobs and stimulates SME (Small and Medium Sized Enterprise) growth:** in 2014 it represented 9% of world GDP – direct, indirect and induced impact;

– **Tourism is one of the fastest growing sectors of the world economy:** international tourism has shown almost uninterrupted growth since the 1950s and has almost doubled over the past decade;

– **Tourism shows particular promise for developing countries:** tourism is growing faster in the world's emerging and developing regions than in the rest of the world;

– **Demand for Africa tourism products keeps growing:** from a small base of just 14.7 million visitors in 1990, Africa attracted 56 million visitors in 2014; and

– **Tourism accelerates reform:** tourism is a beacon for pro-business policies and reforms that can help SME development and stimulate foreign investment.

From an analysis of UNWTO tourism data, it is clear that Africa has an unfulfilled tourism potential, with only a minority of the Sub-Saharan countries taking advantage of the opportunities the sector poses. This is further

confirmed by WTTC's *Travel and Tourism Economic Impact 2015 – Africa* report, which confirms that the direct contribution that the direct contribution of travel and tourism to GDP in 2014 was USD 83.3 billion (3.4% of GDP). This is forecast to rise by 3.7% to USD 86.4 billion in 2015. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported.

In general, it is clear that travel and tourism make a small direct contribution to the GDP (% of GDP) of African countries.

Figure 1.5 Direct contribution of travel and tourism to GDP

Constant 2014 (USD billion)
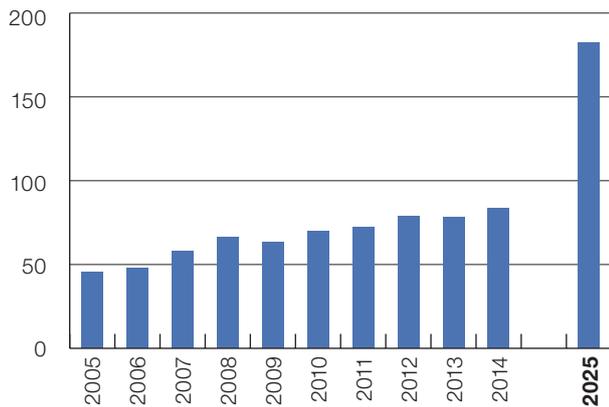
% of whole economy GDP
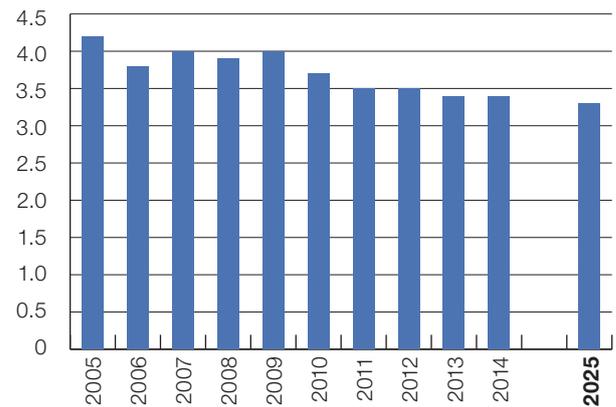
Source: World Travel & Tourism Council (2015).

Figure 1.6 Direct contribution to GDP from travel and tourism (% of GDP)

0.8 - 1.8
1.8 - 2.4
2.4 - 3
3 - 4.4
4.4 - 5.7
5.7 - 16
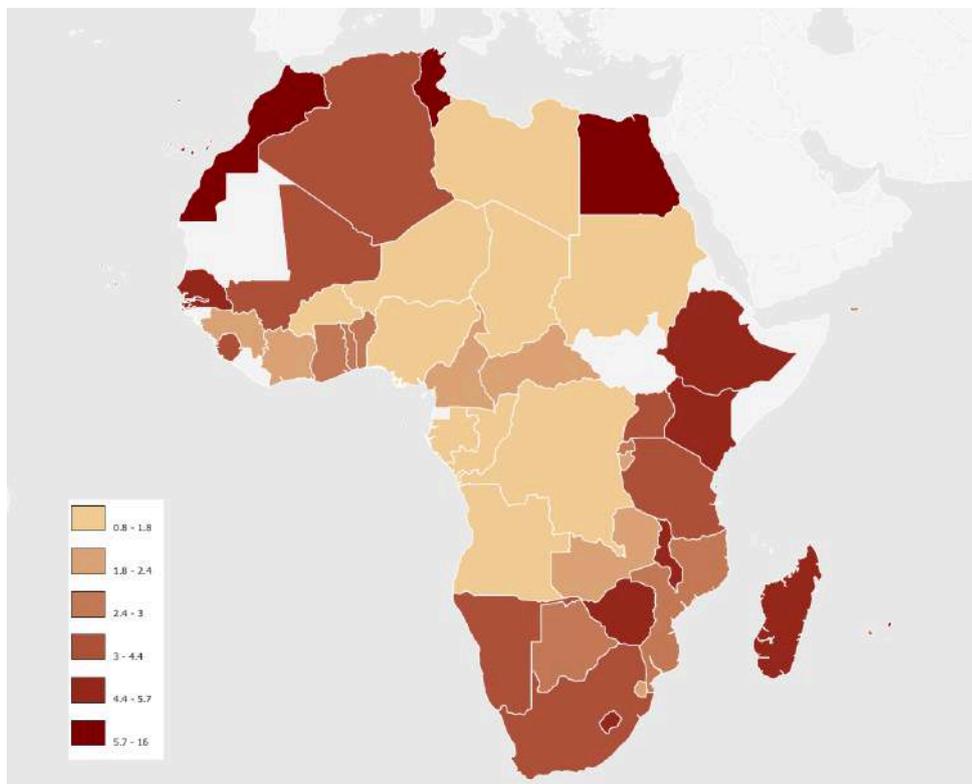
Source: World Tourism & Travel Council (2015).

However, the potential is high and products such as safari tourism, beach tourism, business travel, diaspora tourism, nature/adventure tourism, cultural heritage tourism, domestic travel and intra-regional tourism are just some of the examples provided by the World Bank as major opportunities for development (World Bank, 2011).

Figure 1.7 Tourism product opportunities in Africa

Source: World Bank (2011), *Africa Region Tourism Strategy.*

1.3   Future outlook

Based on the analysis provided, we are optimistic about the economic future of Africa for many reasons. Africa's private sector is increasingly attracting investment, with much of the funding coming from Europe and the United States of America. Returns on investment in Africa are among the highest in the world (World Bank, 2014).

Tourism is one of the key industries driving change in the continent and it provides multiple opportunities for economic growth and improved livelihoods. Among the reasons to develop tourism we can find the creation of jobs, regional economic development, improvement of infrastructure, increasing domestic consumption and exports diversification, cultural heritage and environmental preservation, empowerment of women, the youth and marginalized people, amongst others.

To explore these opportunities, it is essential that African countries adopt clear strategies based on suitable methodologies for tourism product development. It is with this goal in mind that the UNWTO Affiliate Members Programme together with Casa África develop this present report, thus offering African destinations tools, techniques and a unique methodology to help enhance their competitiveness in today's global tourism sector.

2.
Tourism product development

2.1 Tourism product development: key concepts and destination context

There are two key aspects to tourism product development:

1. It is not an activity undertaken in a vacuum, but is part of an extensive and inter-related process; and

2. Market research, product development and marketing represent a continuum. The failure to deliver any of these key components will result in the destination under-realizing its potential.

The range and scope of the tourism product offer is what attracts tourists to a destination. Yet the development of tourism products forms part of a large, inter-related and continuing process and should not be considered in isolation.

A destination's overall development policy will lead to strategic development priorities and principles for the various economic and social sectors, one of which will be tourism. The identification of tourism product development opportunities in line with these strategies will be determined through the understanding of tourist market trends and tastes through market research; and the realization of the opportunities will require capital investment and marketing. Indeed, the link between the market and the product – demand and supply – is fundamental. There cannot be one without the other. Given that the great majority of prospective tourists have not previously
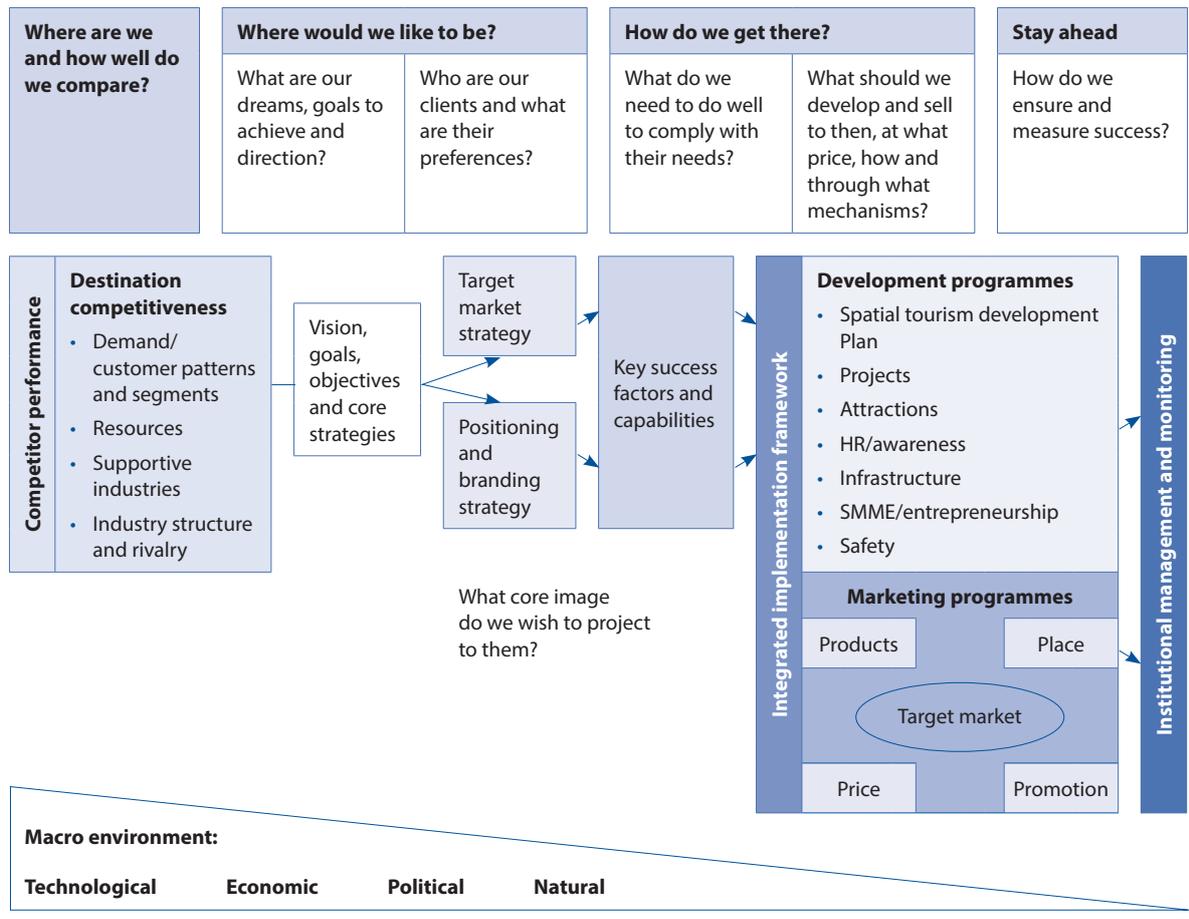
Note: For more information on this topic, please refer to the Handbook on tourism product development, a joint publication by UNWTO and ETC from which, the information presented in the following two chapters is taken.

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Figure 2.1 Destination tourism development framework

Where are we and how well do we compare?	Where would we like to be?		How do we get there?		Stay ahead
	What are our dreams, goals to achieve and direction?	Who are our clients and what are their preferences?	What do we need to do well to comply with their needs?	What should we develop and sell to then, at what price, how and through what mechanisms?	How do we ensure and measure success?

Competitor performance

Destination competitiveness
- Demand/ customer patterns and segments
- Resources
- Supportive industries
- Industry structure and rivalry

Vision, goals, objectives and core strategies

Target market strategy

Positioning and branding strategy

What core image do we wish to project to them?

Key success factors and capabilities

Integrated implementation framework

Development programmes
- Spatial tourism development Plan
- Projects
- Attractions
- HR/awareness
- Infrastructure
- SMME/entrepreneurship
- Safety

Marketing programmes

Products	Place
	Target market
Price	Promotion

Institutional management and monitoring

Macro environment:

Technological   Economic   Political   Natural

Source: World Tourism Organization and European Travel Commission (2011), *Handbook on Tourism Product Development.*

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visited the destination, targeted and effective marketing is vital for tourism destinations and the providers of their tourism products.

Tourism product development can be defined in many ways: at one extreme, it can be seen as embracing all elements with which the visitor to a destination comes into contact, including infrastructure (e.g. transport, utilities), the service personnel, places of lodging, attractions and activities, facilities and amenities; while, at the other extreme, tourism product development can be defined as comprising only those attractions, activities and facilities that are specifically provided for the visitors. What is clear is that without the infrastructure to support the development of the attractions tourists want to see and activities they want to do on their visit, tourism product development will not fully succeed.

Given that demand for almost all such features comes not just from foreign tourists but also from visitors from elsewhere in the destination as well as from the population resident in the vicinity of the development, it is not a simple task to separate these different demand segments. What is important for destination authorities in supporting tourism product development is to understand precisely what combination of objectives it is seeking to meet through their support for the development – and to appreciate the socio-economic benefits of such developments.

For the purpose of this report, the focus is on those products, in which governments can play a role by contributing to achieve one or a combination of the following objectives:

1. To increase and speed up the sector's economic contribution;

2. To shape development in a form that ensures it is both sustainable and responsible, providing good experiences for the tourist but also bringing substantial benefits to the local community and safeguarding the natural environment; and

3. To add to the provision of leisure recreational and other services that can benefit the local community as well as visitors.

These interventions foster development that would not have occurred without some form of direct government action or support.

In many, if not in most instances, large-scale projects such as hotels and resorts are private sector investments, though some form of state support may be provided. This form of development is not included within the confines of this handbook, other than where they constitute attractions drawing tourists into a destination e.g. eco-lodges aimed at the nature-based tourist.

Similarly, infrastructure projects and the provision of amenities, both of which are essential for tourism and which typically require extensive investment from destination authorities, are excluded. Instead the focus of the handbook is on tourism product developments that fall into the two categories of:

–   **Activities:** things to do; and

–   **Attractions:** things to see.

A tourism product in a destination is an amalgam of many experiences as far as the tourist is concerned. It is not just the hotel stayed in, the places, museums, parks, restaurants, theatres, shops visited, or the journey to and from the destination. It is all of these things, and more. When planning new tourism product developments, it is necessary to see how the ideas fit with the existing provision. Any tourism product is made up of three factors:

–   **Experiential:** festivals, activities, community, event, dining and entertainment, shopping, safety, service.

–   **Emotional:** human, cultural and historic resources, hospitality.

–   **Physical:** infrastructure, natural resources, accommodation, restaurants.

The range of attractions and activities that fall under the umbrella term of 'tourism products' covers such diverse components as natural features, history and cultural heritage, the built environment, and the people of the destination themselves. A scenic landscape, a theme park and a classical concert are all tourism products, as are waterskiing, snowboarding, rock climbing, learning to prepare local dishes/specialties or making a traditional handicraft of the destination.

For the purpose of this report we propose the adoption of the following definition:

–   **Tourism product development** is a process whereby the assets of a particular destination are molded to meet the needs of national and international customers.

–   The **'tourism product'** can include natural or man-made attractions, hotels, resorts, restaurants, theatres, activities, festivals and events.

For the purpose of this report, the focus is on the development of a portfolio of things for visitors to see and do (e.g. active pursuits such as sports, water-based activities, hiking/walking/ cycling, etc.; pastimes related to natural and cultural heritage, organized entertainments, health and wellness; and recurring festivals and events).

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Source: World Tourism Organization and European Travel Commission (2011), *Handbook on Tourism Product Development.*

2.1.2 The tourism destination and its characteristics

The tourism destination:

– Comprises many products within the overall destination;

– Involves many stakeholders with differing objectives and requirements;

– Is both a physical entity and a socio-cultural one;

– Is a mental concept for potential tourists;

– Is subject to the influence of current events, natural disasters, terrorism, health scares, etc.;

– Is subject to historical, real and fictitious events;

– Is evaluated subjectively in terms of what represents value-for-money e.g. based on reality compared with expectations; and

– Differs in size, physical attractions, infrastructure, benefits offered to visitors and degree of dependence on tourism – in fact no two tourism destinations can be treated the same, each offering its own unique and authentic attributes.

2.2 Variables influencing tourism product development

In order for destination authorities to approach the process of tourism product development planning in a systematic and market-led way, there are a number of fundamental initial actions to be taken. Of course, all destinations already have some level of tourist activity related to their basic resources and the attractions, activities and facilities that have been created. So, while the building block approach is advocated, it is acknowledged that most destination authorities will already have laid these foundations. These destinations will know what they have that could be developed for touristic purposes and what their strategic product and market developments needs are. Nonetheless, it can be a worthwhile exercise to go back to basics and run through the checklist spelt out below as a means of verifying that the directions being pursued are appropriate and likely to bring the greatest level of beneficial results.

First, it is essential to consider the influences on, and determinants of, tourist demand in order that the right types of products might be developed, i.e. that the market wants and that bring the destination the greatest reward, while creating minimal environmental damage or socio-cultural conflict.

The UNWTO series of long range tourism forecasting studies – *Tourism to the Year 2000 and Beyond, Tourism 2020 Vision and Tourism Towards 2030* (published in

1991, 1997 and 2011 respectively) identified a series of qualitative factors that shape the pattern, scale and forms of tourism development. These remain valid. Some of the factors continue to exert an influence decade after decade, albeit in different manifestations; others have an effect for a limited period only.

The continuing influences – the *foundations* for tourism – include economic, technological, political and demographic factors.

However, there are other key factors that determine a destination's strategic approach to the development of its tourism sector:

– What it has, or can develop, to attract and satisfy tourists in a sustainable manner – e.g. in the main its natural, historical and cultural resources;

– What the market opportunities are for the products it can develop, taking account of competitors and market trends and tastes;

– How strong are: a) the destination's factors of production (e.g. land, labor, capital and enterprise) in respect of generating and supporting tourism development, and b) its standing in attracting outside investment; and

– What priority and level of support the destination government allocates to the tourism sector.

2.3 The role of destination authorities in tourism product development

The governmental role in democracies is to establish the conditions for economic growth, through facilitating and supporting those sectors where they can have competitive advantage. In order to facilitate and support their tourism sectors, governments are under pressure inter alia to develop the enabling transport and utilities infrastructure, establish the vocational training system, and create a positive image of the destination as an aspirational place to visit in the international tourist marketplace. These are all high cost items. In addition, as tourism provides opportunities for SMEs (small and medium enterprises) many governments provide incentives to encourage this type of business.

As a result, the involvement of destination authorities in the development and marketing of their tourism sectors is imbalanced in many instances. While tourism development policy, strategies and plans exist for the majority of countries around the globe, and almost all destinations – either through state, private or combined agencies – undertake destination marketing and promotion geared to attracting tourists, a relatively small number of destination authorities are actively involved in shaping the tourism products developed and offered. For countries that place tourism high on their economic development priorities, major investment is made in air and sea ports, roads, power and water provision – often in the case of less developed countries through the support of international

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or regional funding agencies. For other countries public-private investment is becoming an increasingly used model for the financing of tourism infrastructure.

The reason why relatively few countries are directly involved in tourism product development as opposed to destination marketing is not difficult to find. Government is responsible for establishing goals and directions for the destination's various economic sectors; and are keen to establish the destination's reputation as an attractive place to visit – since the market perception also influences non-tourism factors like inward investment in industry and commerce. Furthermore the tourism operators, while accepting their own responsibility to fill their seats or beds, argue that the state should finance the marketing of the destination as a whole.

Tourism product development has been left largely to market forces in most destinations with well-developed and long-established tourism sectors. Only in the past half-century have governments sought to direct tourism product development. Certain types of attraction or facility are included in tourism development policies with plans increasingly geared to meet specific socio-economic objectives. These objectives can be as varied as attracting inward foreign investment, generating local level economic impacts in the form of SMEs and/or community tourism, boosting economic development in certain regions of the destination or reducing the seasonal imbalance.

While the majority of such guidance – and direct intervention through incentives – relates to economic growth, governments can also direct the type of tourism product development to minimizing damaging environmental or socio-cultural impacts on the destination and its resident population. There is also a third goal in supporting tourism product development, namely improving the provision of facilities that the local population can also enjoy, thus improving their quality of life. As the living standards of population rises, so does demand for leisure and recreational products and services. Tourism can meet both these needs: first, by bringing in visitors to the area to visit the attractions, participate in the activities and utilize the facilities developed; and, second, by providing these attractions, activities and facilities for local people to patronize. In many instances local demand alone is insufficient to justify the development but can serve as the top up for the features created principally for the visitor market.
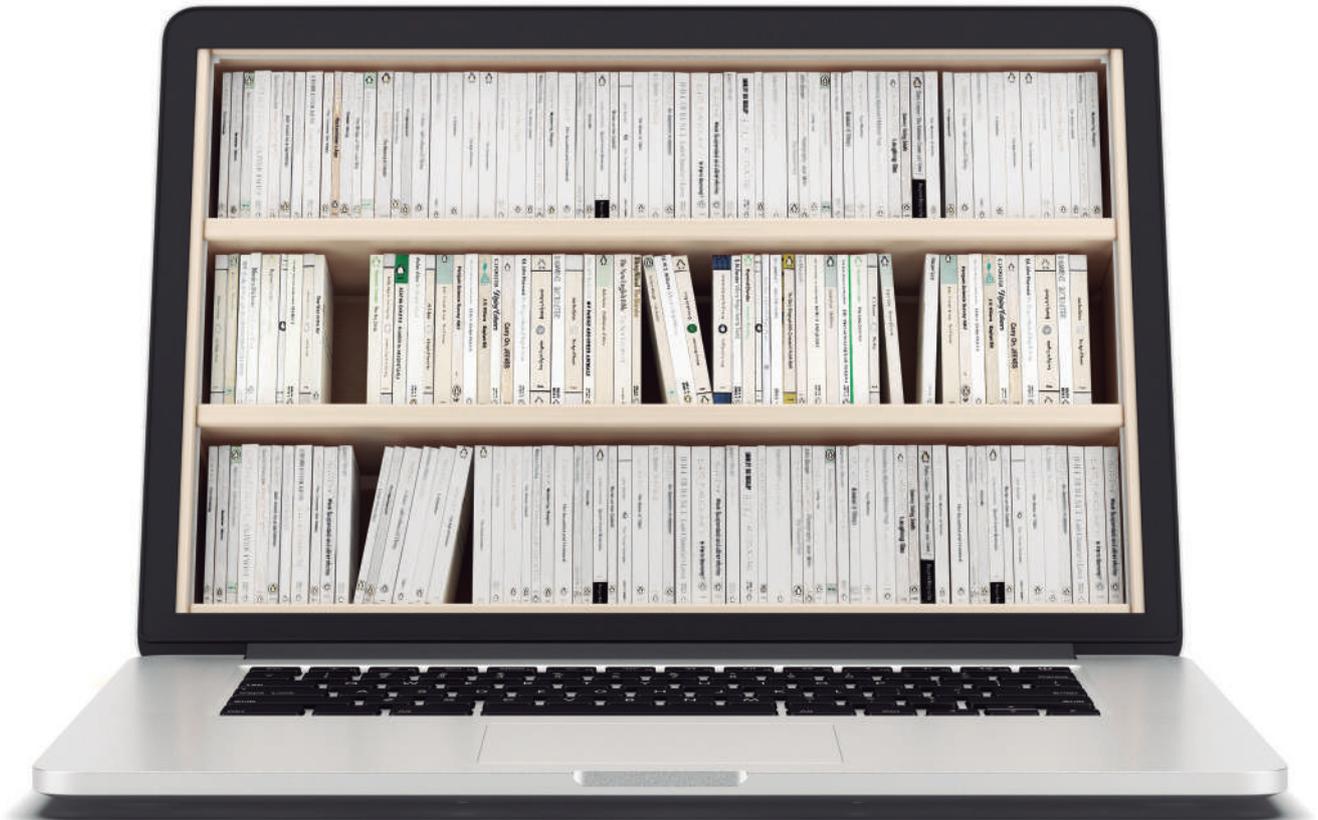
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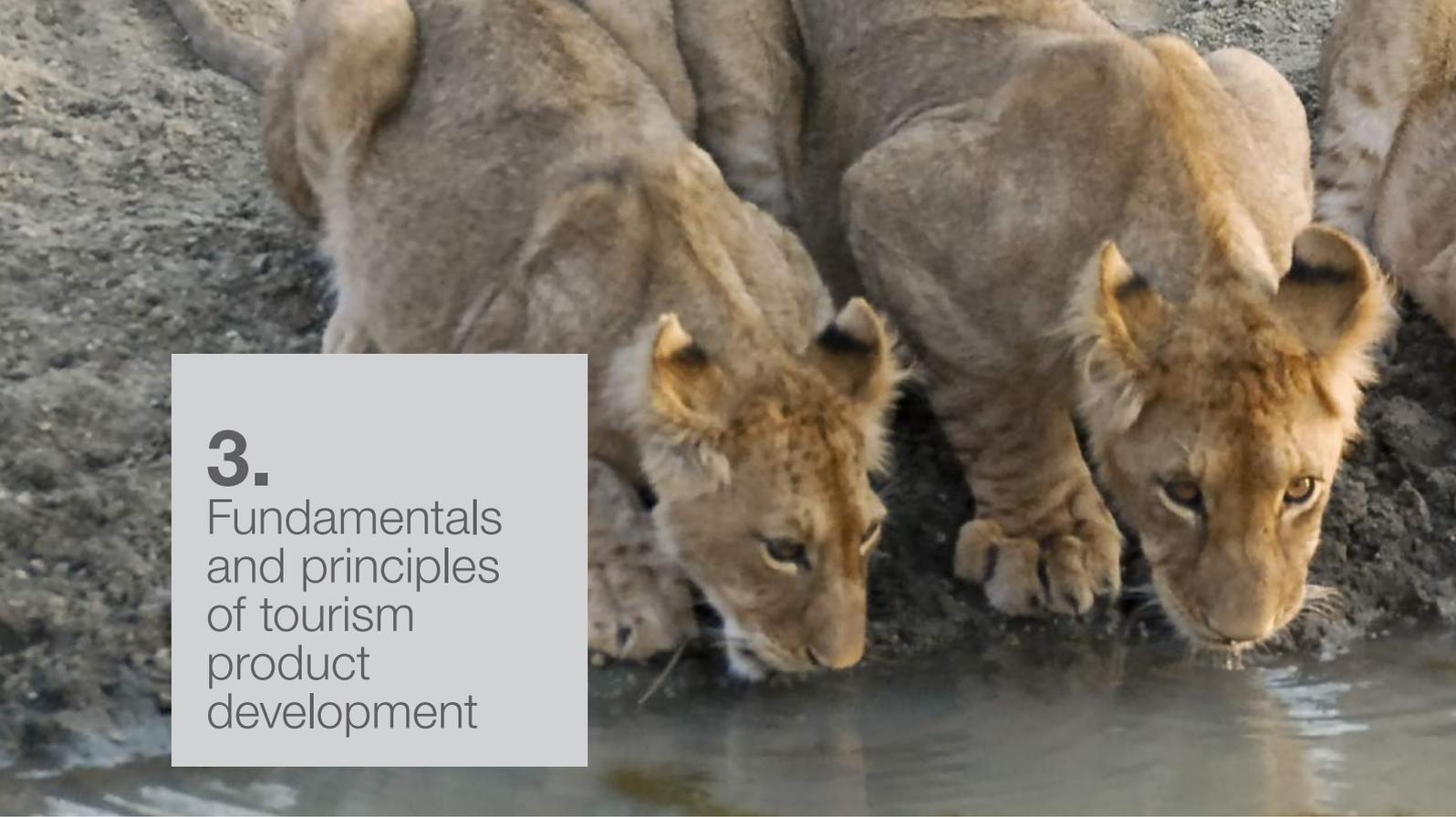
3.
Fundamentals and principles of tourism product development

3.1 Aspects to put in place before effective tourism product development

There are three fundamental issues to which all destination authorities need to give the most careful and detailed consideration, namely:

1. **Structures:** establishing appropriate institutional arrangements for tourism;

2. **Inter-agency coordination:** tackling the challenge of coordination both between central government departments and down the line to the regional and local administrations; and

3. **Planning system:** establishing a planning system and a full planning process that gives adequate guidance but encourages originality and stimulates investment. Tourism is unlike any other economic sector in that it involves the state, private sector and community where it takes place. Under such circumstances:

   – Planning for tourism is vital;

   – A different approach to policy and planning is needed to that used for other sectors; and

   – In order to create an economically successful and fully sustainable sector over the long term, tourism planning should be comprehensive, fully coordinated and undertaken over an extended time frame.

3.2 Principles and procedures of tourism product development

Then there are a series of principles that underpin all sound tourism product development planning and successful operation, whether stimulated by the public sector, arising from private sector, or community initiative:

1. Understanding market tastes and trends – market research;

2. Market: product 'matching';

3. Designating tourism development areas/zones;

4. Undertaking extensive stakeholder consultation – including with the local communities in the areas of development – in an open manner and in a spirit of co-operation;

5. Pursuing flagship development opportunities;

6. Identifying opportunities for clusters, circuits and events;

7. Preparing a full product portfolio and investment plan;

8. Ensuring that personnel with the appropriate tourism technical skills are in place at national, regional and local levels to carry the process of tourism product development forward; and

9. Drawing up a marketing and promotion strategy to support the tourism product developments, and implement a programme of marketing communications.

In fact, like for any product development, tourist attractions, activities, facilities and events must first and foremost be in line with the tastes and trends of the market. Destinations need to know what the market likes, what it is looking for, and how its preferences are changing and are likely to change in coming years. Demand is not static and is subject to a wide range of influences – including marketing and promotional campaigns.

Translating these patterns of demand into products and their presentation is the challenge for destinations. This process involves relating the resources available in the destination to market demand and developing a product offer that will appeal to a number of identified target markets and segments. The product development strategy will depend on the exact nature of the resources available: if there is a major attraction, then a flagship approach using a hub and spoke approach can be employed. If, however, there are no opportunities for destination 'attractors', then a clustering approach whereby a number of features can be grouped together to constitute a product offer that can persuade the prospective visitor to choose the destination. The use of festivals and other events to bring visitors into a destination that they might not otherwise choose to visit, or to address seasonality imbalances of visitor flows, can be valuably employed.

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Table 3.1	Tourism product development: principles and procedures

Activity	Purpose
Market Pest Political, economic, social and technological analysis	Understand profile, characteristics, tasks and trends of markets and segments.
Market: product matching	Identify products and services to be developed in line with market requirements.
Tourism/product development areas	Identify areas within the overall destination appropriate for specific types of product development.
Stakeholder consultation and collaboration	Ensure the opinions and aspirations of all relevant stakeholders – local, national, international – are canvassed and taken due account of in the tourism product development plans prepared.
Flagships/hubs	Identify outstanding features within one or more tourism/product development areas where major products can be developed to constitute 'hubs' to attract tourists.
Clusters, circuits and events	Create the 'spokes' fed through the 'hubs' by bundling together a range of attractions and activities, creating tourism routes, and organising festivals and events.
Product portfolio and investment plan	Formulate the various tourism product development opportunities into a cohesive and integrated development plan, and prepare and disseminate a product investment portfolio for prospective investors.
Human resource development	Create vocational training and managerial educational programmes that produce the level and quality of personnel needed by the planned tourism product developments.
Marketing and promotion	Feature the tourism product developments in the positioning of individual tourism development areas as part of the overall destination branding.

Source: World Tourism Organization and European Travel Commission (2011), *Handbook on Tourism Product Development*.
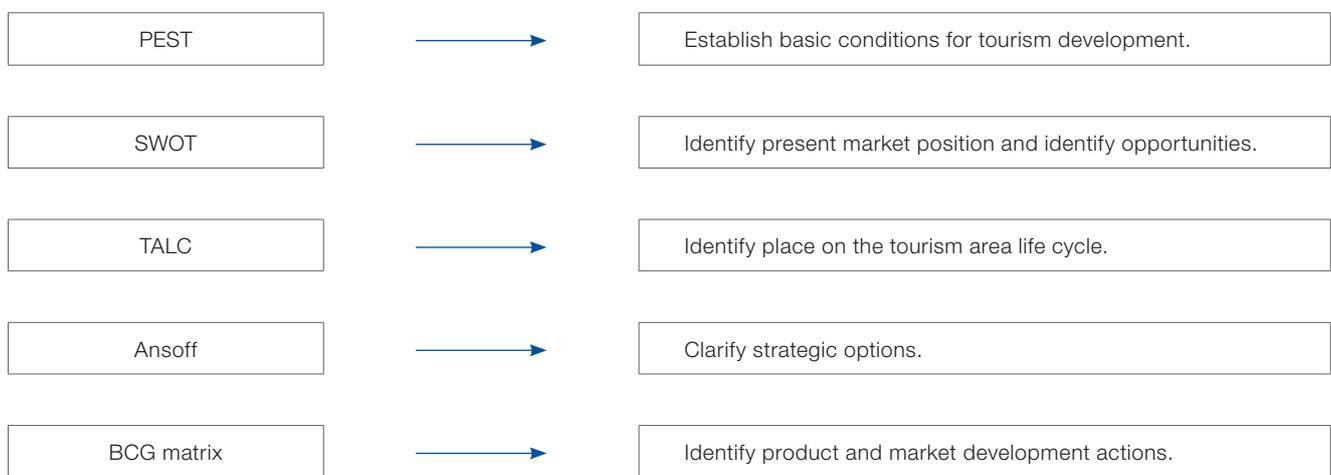
3.3 Steps in the process

Having established the overall priorities and policies of the tourism sector, the task of exploring the potential for tourism product development and leveraging identified opportunities that meet the market´s requirements for **innovation, differentiation** and **authenticity** involves a three-stage process:

1. Establishing the present situation;

2. Identifying the opportunities; and

3. Prioritizing the destination's own tourism sector's objectives.

There is a series of five analytical tools that can help a destination understand where it is, what options it has in respect of the development of its tourism sector, and how best to focus its product development and marketing strategies. These are summarized in the chart below.

Figure 3.1 Investigating the potential for tourism product development: tools

PEST	→	Establish basic conditions for tourism development.
SWOT	→	Identify present market position and identify opportunities.
TALC	→	Identify place on the tourism area life cycle.
Ansoff	→	Clarify strategic options.
BCG matrix	→	Identify product and market development actions.

Source: Tourism Development International.

3.3.1 Establishing the present situation

It is important that destinations understand where they fit, and how they are perceived, in the international marketplace. There are a series of analytical tests destinations can conduct that will help establish what their tourism product development opportunities might be and, based on these, what its priorities should be. It is important at the outset for destinations to understand:

1. Where they are in terms of their political and socio-economic development – the backcloth for tourism development. This is undertaken through PEST analysis – political, economic, sociocultural, technological;

2. What their competitive position is, obtained through SWOT analysis – strengths, weaknesses, opportunities, threats;

3. Where they are on the tourism area life cycle (TALC);

4. Whether they are facing a challenge of market development, product development or both through use of the Ansoff Matrix; and

5. Where their existing product range fits on the Boston Consulting Group Matrix (e.g. star, question mark, cash cow or dog).

The starting point for each destination can thus be gauged by simple reference to the set of determinants, how well positioned and equipped it is to face the challenges, and the position it has on the TALC chart and the two strategic planning matrices.

3.3.2 Identifying the opportunities

By applying the strategic planning tools presented in the previous section, a destination can determine:

1. What its current position and performance as a competitive destination are; and

2. The strategic directions in terms of product and market development in which it could be heading to achieve sustainable growth for its tourism sector.

In essence, the process will tell the destination what its opportunities are in the broad sense – the raw materials that could be developed into end products and services with market appeal.

It can be useful for a destination to draw the findings together in the form of a check list as set out below:

Table 3.2 Tourism product development checklist	
Accessibility	– Transport infrastructure – all modes; and – Degree of dependence on foreign operators.
Resources/existing products	– Range and quality of natural and cultural resources; – Degree of diversification in present product offer; – Degree of geographic concentration of present product offer; and – Supply and caliber of, and training facilities for, personnel for the tourism sector.
Demand	– Scale and trends of existing market demand – and forecast growth; – Market and product development opportunities – and impact on growth of the tourism sector; – Present and possible future market mix; and – Position on the Tourism Area Life Cycle.
Policy and government	– Form of government and degree of centralization; – Existing priority attached to, and policy for, tourism; and – Openness for tourism e.g. visa arrangement and FDI (Foreign Direct Investment) conditions.
Tourism in the destination's economic development	– Destination's stage of economic development; – Relative importance of tourism in present economic development; – Structure of markets; and – Level and quality of entrepreneurship, innovation and education.

Source: Tourism Development International.

3.4 Prioritizing the destination's tourism product development objectives

With the broad range of product development opportunities ascertained, the next stage is to assess how approaches to realizing these opportunities might differ according to the destination's policy and strategic objectives established for tourism. Though almost all destinations support their tourism sectors because of the economic benefit it can generate, there are many ways in which this goal can be put into practice. At one extreme are destination governments that take the line that tourism is a private sector activity in which government should

have minimal involvement. In this scenario, government involvement is typically limited to the management of tourist movements into, out of and around the destination through immigration controls and transport infrastructure, the regulation of travel and tourism enterprises, and some degree of destination marketing. In sharp contrast are those destinations whose authorities play a hands on role in encouraging, facilitating and supporting tourism development through the circulation of market research studies to the private sector, the organization of training programmes for sector personnel, the availability of fiscal and other incentives for product development, and extensive promotion of the destination.

Most countries fall somewhere between these two extremes.

While economic considerations are the principal reason for governments to support their tourism sectors, there can be a sharp division between those who see inward foreign investment as the key priority and those whose support for the sector is based on its ability to create economic activity – on a small to medium scale – in areas and among communities that have few alternative forms of development and economic advancement.

Most destinations, recognizing that tourism also has environmental and socio-cultural impacts, by virtue of taking place in the host country, seek to shape tourism product development so that it creates economic benefits and adds to the attractions and facilities that the local population can enjoy while avoiding the creation of damaging impacts on the area's natural resources or society.

Within this interlinked network of objectives there is a multiplicity of aims-goals-objectives that governments can set for their tourism sectors, many of which require different approaches to tourism product development.

There is also a wide range of criteria that governments can set in deciding if, and how, to support tourism product development. Though the criteria are presented in three broad groups – economic, socio-economic, and management and coordination – it is clear that there is a considerable degree of overlap and interdependence:

Economic

1. To attract foreign investment;

2. To achieve more rapid and extensive development of the tourism sector;

3. To assist market product diversification;

4. To assist in product innovation;

5. To reduce the risk of over-concentration on a narrow product range (and limited market base) by facilitating the development of a new range of products identified through market research as being in line with market trends and preferences;

6. To adjust the seasonal pattern of visitation through product developments that will spread tourism more evenly across the year;

7. To increase employment, tourism being a labor-intensive sector; and

8. To boost local SME development in order to retain a higher proportion of economic benefits through the reduction of leakage and increased backward linkages.

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Socio-economic

9. To facilitate regional development by improving access to a part of a country not benefiting from the sector as much as other parts e.g. rural areas, urban regeneration projects;

10. To assist the development of responsible tourism products (e.g. fairness to local community/pro-poor);

11. To support community-based tourism projects;

12. To seek to alleviate/eradicate poverty through programmes such as Sustainable Tourism for Eliminating Poverty; and

13. To create a flagship attraction that represents a geographic hub in a part of the country allowing other complementary products to be developed to create a cluster – can also be a thematic flagship hub.

> The 20 criteria that determine a destination's priorities in respect of the tourism sector – and specifically tourism product development – cannot be applied unless the organizational structures, processes, plans and coordination mechanisms are in place.

Management and coordination

14. To ensure the development of sustainable tourism, balancing economic benefits with the retention of environmental resources and the host community's values and culture;

15. To enhance the quality of the product offer;

16. To build a strongly positive image of the destination, by endorsing products of prestige and quality, thereby creating benefits both for tourism and through inward investment in other industries;

17. To coordinate tourism product developments that involves multiple assets and entities;

18. To facilitate tourism product development that is dependent on state intervention and would not occur otherwise;

19. To ensure that tourism product development is in line with protection/preservation of ecologically sensitive environments and the conservation of a community's cultural heritage and historic sites; and

20. To coordinate the development and marketing of product clusters and trails/circuits.

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4.
A methodology
for tourism
product
development
in Africa

4.1   The model destination

Every destination is different, thus one single approach to tourism product development would not be appropriate. Furthermore the different types of tourism product vary in terms of their needs so there cannot be a valid standard approach to all product development. However, in order for this Report to provide the necessary guidelines for each destination in Africa, there are certain key principles in the process of tourism product development planning that can be illustrated through what might be called 'a model destination'. This may not relate to any specific destination but is drawn in such a way that many destinations will share some – even several – of the characteristics and features outlined below. In that way, even if a destination does not have one or more of the aspects detailed it can still follow the main steps of the planning process.

Based on this approach, the model destination is characterized by:

1. Being in the growth phase of the tourism area lifecycle;

2. Facing issues of broadening both its product and market mix;

3. Being helped through a good level of government support but;

4. Hampered by limitations both on manpower and financial resources; and

5. Concerns about environmental and socio-cultural impacts in parts of the destination.

A fuller specification of the model destination is outlined as follows:

Location/access

– A short haul destination for one major regional source market area, but mid-long haul from others; and

– Good access provided by an active national carrier, the main scheduled carriers from principal source markets, and package tour charters during the main tourist seasons.

Resources existing products

– Has a distinctive and high quality coastal resource for tourism development, complemented by other natural and cultural heritage resources;

– Has a concentration of tourism development in a small number of locations; and

– All resources have considerable remaining potential for development, though there are areas of environmental vulnerability and traditional communities that need to be protected from overdevelopment.

Tourism performance

– Has a market perception of being a progressive country with much of tourist interest, and generally safe, though with standards below those of major tourist destinations;

– In the strong growth stage on the tourism area life cycle;

– Looking to broaden its market appeal, while developing new products to extend its market attractiveness to both existing and new markets; and

– Allies itself to a number of regional competitors, following the lead set by these destinations in some respects, and developing its own initiatives in others.

Government policy and structures

– A market economy where the government makes strategic intervention in support of its economic development policies and strategies;

– A rapid growth economy but not yet at the stage of being a fully industrialized country; and

– Has decentralized planning authority to the regional/provincial level but not to the local level.

Tourism policy

– Pursuing a development strategy of a mixed economy with tourism being one of a number of important sectors, but not the predominant one;

– Is seeking a balance between foreign and local investment in all sectors, including tourism;

– Is seeking to spread the benefits of tourism around the country through the development of clusters of attractions/activities and touring circuits rather than through major, fixed site developments which are attracting new investment with little need for state intervention; and

– Is seeking to achieve a more even seasonal spread of tourism.

Local economy

– Has growing and dynamic local investment and entrepreneurial sectors though not sufficiently large to finance major development projects without state assistance or foreign partners.

Manpower

– Has a number of planning personnel with qualifications and experience of the tourism sector at central level, but limited capability at regional/provincial level; and

– Has a vocational hospitality sector training college but output is insufficient to meet the sector's needs – particularly at supervisory, back office and managerial levels.

In reality, no destination starts tourism product development from scratch: all destinations have certain facilities, attractions and amenities that are patronized by visitors from outside the area though many of these features were established to cater for the needs and desires of the local population. Every destination has an existing institutional set up, planning systems and procedures, and economic development policies and strategies into which development in the tourism sector fits.

The major limitation, however, normally lies in the financial resources and broad knowledge of the tourism sector needed to develop a thorough process of tourism product development. For this reason, the UNWTO Affiliate Members Programme has developed a specific methodology to help destinations develop their tourism product strategy: the 'Prototype methodology'.

4.2 UNWTO Prototype methodology for tourism product development

The 'Prototype methodology' aims to provide the framework where the private and public sectors collaborate to share knowledge and create innovative tourism products to increase the competitiveness of destinations.

The Prototype methodology assists destinations and the private sector in finding solutions to specific issues in developing private and public initiatives whose main goal is to drive economic and social growth.

The Prototype methodology designs a road map based on initial research and analysis, incorporating the possibility of governance models, tourism development products, territorial tourism intelligence, brand identity and communication strategies.

The Prototype methodology creates a working committee among the Affiliate Members who want to participate, exchanging perspectives, approaches and insights in order to build the ideal project.

All projects derived from this Prototype methodology under UNWTO are required to comply with the Global Code of Ethics for Tourism to maximize tourism's socio-economic contribution while minimizing its possible negative impacts. In respect to the methodological approach, it follows a 5-phase approach, with a series of activities as follows:

Figure 4.1 UNWTO prototype methodology

1. Prototype / Discovery phase → 2. Technical design → 3. Business plan development → 4. Going live → 5. Supervision and improvement processes

Before presenting in detail each of these phases it is important to briefly summarize their scope:

PHASE 1

– Request from destination;

– Compilation and study of information about the destination;

– Field work/prospecting trip;

– Analysis and initial insights, targeting; and

– Project packaging.

PHASE 2

– Approval by destination for prototype development;

– Invitation to the Affiliate Members;

– Identification of potential participants;

– Initial drafting of governance model;

– Approval of initial brand identity; and

– Appointment of the team for prototype development.

PHASE 3

– Creation of a Supervision Committee;

– Project positioning;

– Development of touristic content;

– Communication and visibility model;

– Governance model;

– Finance and funding model; and

– Definition of goals and Key Performance Indicators (KPIs).

PHASE 4

– Appointment of Executive Committee and management team;

– Implementation of a territorial tourism intelligence unit and technological surveillance;

– Institutional and reputation strategy;

– Marketing and communication strategy;

– Research and development activities;

– KPIs Goals analysis and measurement; and

– Financial analysis.

PHASE 5

– Reengineering and optimization with diagnostic tools;

– Upgrade and improvement plan; and

– Follow up and continuous performance evaluation and certification.

For the implementation of the Prototype, each of these phases consists of a series of activities, workflows and critical aspects that are presented and explained.

Figure 4.2 UNWTO prototype: discovery phase

Goals

To research the touristic offering as well as other aspects of the destination that could be relevant in terms of brand identity and attractiveness. This research allows UNWTO and the destination to define the prototype.

Activities	Lead by
1. Destination to draft a letter to UNWTO, formally requesting the development of a prototype.	Destination
2. Destination to send preliminary information about its respective goals and desired positioning.	Destination
3. Field work for destination SWOT analysis.	UNWTO/ External collaborator
4. Destination analysis and definition of main strategic guidelines.	UNWTO/ External collaborator
5. Approval of the prototype's central concept and approach.	Destination

Workflow

Critical aspect and timing

Recommendations:

– Before sending the letter of interest, UNWTO suggests verifying the predisposition of the destination with local agents to ensure a positive perception of the project;

– To identify a local representative to collaborate with UNWTO consultants in field work; and

– Timing: 2 months max.

Delivery

– PR00: Letter of interest.

– PR01: Information from destination (strategic plan, key tourism supply, etc.).

– PR10: Destination analysis.

– PR99: Approval of central concept and approach.

Figure 4.3 UNWTO prototype: technical design

Goals

Identification of main project agents among the UNWTO Affiliate Members, development of the initial governance model as well as the brand and corporate identity of the project.

Activities	Lead by
1. Announcement and invitation to Affiliate Members.	UNWTO Affiliate Members
2. Prototype presentation for members in order to identify potential participants.	UNWTO Affiliate Members
3. One-on-one meetings with potential project participants.	UNWTO/ External collaborator
4. Development of an initial approach to the brand and corporate identity.	UNWTO/ External collaborator
5. Initial guidelines for the governance model.	UNWTO/ External collaborator
6. Appointment of a Working Committee to develop the project (management meetings, proposal and business plan).	UNWTO

Workflow

Critical aspect and timing

Recommendations:

– Suggestion of participants by the destination;

– UNWTO to consider working with an external brand expert and designer for the initial brand and corporate positioning; and

– Timing: 2 months.

Delivery

– PRTD00: Announcement and invitation letter to Affiliate Members.

– PRTD01: Prototype presentation for Affiliate Members.

– PRTD10: Definition of initial brand and corporate positioning of the prototype.

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Figure 4.4 UNWTO prototype: business plan development

Goals

After the consensus phase, the destination and agents, under UNWTO leadership, will define all operative tools required for the implementation of the project during the development of the business plan.

Main activities	Lead by
1. Creation of a Supervising Committee.	UNWTO
2. Project design.	Work Committee
3. Economic viability plan.	Work Committee
4. Communications and media plan.	Work Committee
5. Governance model.	Work Committee
6. Definition of KPIs and big data analysis model (competitive intelligence/ technological surveillance).	Work Committee

Workflow
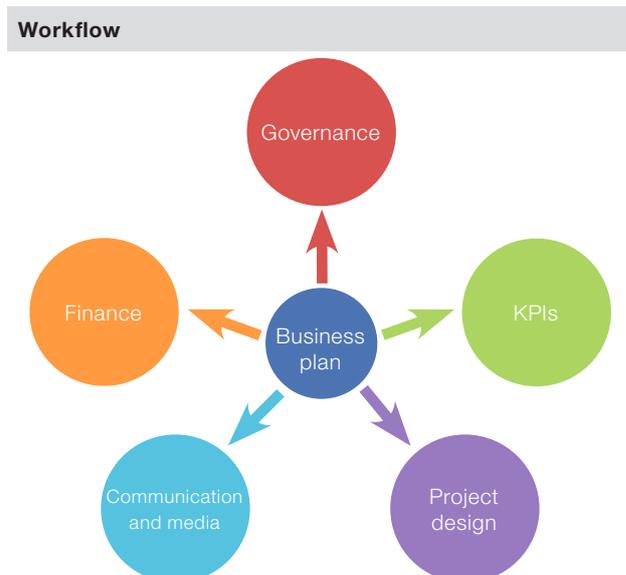
Critical aspect and timing

– The Supervising Committee must approve each component of the business plan, requiring **consensus by** all members and destination;

– Timeliness of development will depend on the capacity for **quick approval** by the Supervising Committee;

– The first task for the Supervising Committee will be to coordinate with the project leader; and

– Timing: **3 to 6 months.**

Delivery

– BUS00: Kick-off, nominations for Supervising Committee.

– BUS01: Planning for Phase 3.

– BUS02: Touristic package design.

– BUS03: Economic project valuation.

– BUS04: Communication and media plan.

– BUS05: Governance rules and model.

– BUS06: Definition of KPIs.

– BUS09: Closing meeting.

Figure 4.5 UNWTO prototype: going live

Goals

Implementation of the project following approval of the business plan: management team and participants will initiate the marketing and communications plan and R&D (competitive intelligence/technological surveillance).

The project should be audited by an external company in order to ensure transparency.

Main activities	Lead by
1. Official announcement of management team and executive committee.	Plenary
2. Announcement of team members and presentation to Executive Committee.	Management team
3. Launch of marketing and communication plan.	Management team
4. R&D (activate VT/IC unit according to UNE 166006 AENOR). Set-up of research and innovation procedure for future applications and by-product actions.	Management team
5. Follow-up analysis and measurement of the goals based on agreed KPIs.	Management team/ Executive Committee
6. Financial audit.	External audit

Workflow

Critical aspect and timing

– The Executive Committee should be appointed during a period of 3-4 years;

– The management team should meet with Executive Committee every month; and

– To maintain its reputation and transparency, the project myst be audited by an external company.

Delivery

– GOA00: Announcement of management team.

– GOA01: Institutional and reputation management plan.

– GOA02: Supervision of marketing and communication activities.

– GOA03: Delivery of process manual of the VT/ICs unit AENOR standard UNE 166006.

– GOA04: External audit pitch.

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Figure 4.6 UNWTO prototype: supervision and improvement

Goals

Implementation of methods of continuous improvement and assessment, lead by UNWTO and independent expert consultants, providing valuable support and an objective evaluation of the effectiveness of the methodology.

Main activities	Lead by
1. Creation of a follow-up Committee.	UNWTO
2. Project audit.	External audit firm
3. Periodic reporting.	Project leader
4. Risk and conflict management.	Project leader
5. Continuous performance evaluation and certification.	Work Project leader

Workflow
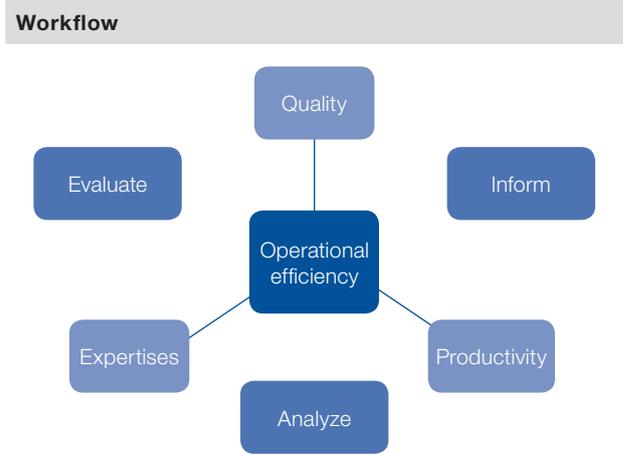
Critical aspect and timing

– **Coordination activities and risk management tasks** will be crucial during the very first steps of the project, during the first weeks of the "going live" phase;

– The external project support can be **decreased** during the "going live" phase, and after the transition period the destination will assume all responsibilities and activities; and

– No specific timing.

Delivery

– SIP00: Follow-up rules and nominations.

– SIP01: Periodic reporting.

5.
Best practices in tourism product development and destination success in Africa

To highlight some of the best practices in tourism product development in Africa, a series of case studies have been selected and are now presented. These cases also illustrate key points introduced and discussed throughout the Report. For a quick reference, a summary of the cases, by region, project name and category and the salient features of tourism development are presented below.

Table 5.1	Summary of case studies		
Country/ region	**Project name**	**Case author/ Project category**	**Salient features of tourism development**
Kenya	Campi ya Kanzi	*Campi ya Kanzi (Barbara Stoddard)* Luxury ecolodge	– Promotion of transformative tourism; protect the environment and provide economic benefits to the locals.
Cape Town	Tourism product innovation in Cape Town	*Cape Town Tourism* Tourism product innovation	– Increased mobility for visitors; Kirstenbosch National Botanical Garden - the world's first botanical garden to preserve the country's unique indigenous flora.
Kenya	Kicheche Laikipia Camp	*Ecotourism Kenya (Andrew Karanja and Milcah Shabanji)* Luxury tented camp	– Environmental protection, conservation of resources, waste management, compliance to relevant legal requirements and sustainability in areas of operations.
Morocco	Importance of training structures	*International Higher Institute of Tourism of Tangier/Morocco (Mimoun Hillali)* Training	– The human factor is the basis of the successes and failures of tourism development; and – Training is essential to improve human potential, based on five axis: safety, hygiene, quality, hospitality and information.
Africa	The Yamoussoukro Decision	*IATA (Chris Goater)* African Aviation	– Aviation's role in Africa's economic, social and cultural life; and – The Yamoussoukro Decision - Reports demonstrates the tremendous potential for African aviation if the shackles are taken off.

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Table 5.1 Summary of case studies

Country/ region	Project name	Case author/ Project category	Salient features of tourism development
Tanzania	Isoitok Camp Manyara	*Isoitok Camp Manyara (Chris Pilley)* Eco friendly sustainable camp	– Experience the Maasai culture to truly understand their traditions that are part of daily living; and – Sustainable existence which benefits all parties.
Africa	Leveraging Africa's Human Capacity for Tourism Development	*African Development Bank Group; Africa House, New York University; Africa Travel Association* Report	– The report, "Leveraging Africa's Human Capacity for Tourism Development", emphasizes the crucial role tourism plays in Africa, as it harnesses the potential to increase trade, create socio-cultural linkages, and spur economic and job opportunities.
South Africa	Kalahari Red Dune Route	*Open Africa (Claire Alison)* Platform for economic development	– Establishment of tourism routes that offer travelers authentic experiences while generating income and jobs for local people. The routes are used as platforms for rural economic development while also developing small businesses in the process.
Kenya, Tanzania and Uganda	Potential of Cultural Attractions	*Russian International Academy for Tourism (Bgatov Andrey and Seselkin Aleksei)* Cultural tourism promotion	– The tourism in national parks is excessively operated in marketing of the East Africa countries, but at the same time historical and cultural objects of the countries of this region are unfairly forgotten.
Africa	Importance of tourism SMEs	*Simply Experience Travel (Thomas Armitt)* Tourism development strategy	– With a sustainable approach to planning for tourism development, initiatives that empower small businesses with knowledge and skills to match the tourist markets' expectations and needs, and micro-credit loan schemes to help bring innovative and socially inclusive ideas to reality, SMEs in tourism could create the foundations for a sustainable tourism sector across the continent.

Table 5.1	Summary of case studies		
Country/ region	**Project name**	**Case author/ Project category**	**Salient features of tourism development**
Kenya	Mombasa Beach Operators' Livelihood Project	*The Travel Foundation (Isabel Kearney); UNWTO (Marcel Leijzer)* Sustainability of tourism support	– Programme for long term sustainability of tourism support along the Kenyan coast through strengthening livelihoods for beach operators, improving their interaction with tourists, and minimising tourist hassle; and – 20 beach operators who participated in the project reported improvements in livelihood indicators.
Africa	Sustainable Tourism Certification Alliance Africa	*The Sustainable Tourism Certification Alliance Africa (The Alliance)* Sustainable tourism certification	– It is a network of sustainable tourism certification stakeholders in Africa aiming to enable an integrated approach to sustainable tourism certification throughout the African continent; and – It aims to reduce poverty, improve livelihoods, and promote resource efficiency through sustainable tourism management practices.
Africa	Transformative Tourism	*Transformative Tourism (Sana Butler)* Redirect tourism cash flows	– Local community groups capitalizing on the luxury of tourism's full potential; – 8 out of the top 11 most expensive resorts in the world are in Sub-Saharan Africa but there are women and children living on less than USD 1.25 a day; and – Tourism's cash flow needs to be redirected away from large multinational corporations and mega businesses and to the local population.
Senegal	Island of Gorée	*University of Bologna (Elisa Magnani)* The cultural heritage of Gorée as a tourist resource	– Despite the development opportunity brought by tourism, Gorée's territorial and social problems have worsened in the last decades - mainly as a consequence of bad governance - while its local population has been unable to improve its living conditions through this activity; and – Gorée tourist development would benefit greatly from a greater connection to the UNESCO Slave Route.
Tanzania	Mnemba Island Marine Conservation Area (MIMCA)	*University of Johannesburg (C. Burgoyne); University of South Africa (Prof. K. Mearns)* Protect the marine resources around Mnemba Island	– Mnemba reefs are a significant contributor to Zanzibar's economy. The reefs are being damaged due to poor utilisation practices and governance has become a vital topic of discussion. Despite this, governance has been difficult to implement due to stakeholder conflict over resources.
Africa	Hospitality in Africa	*W Hospitality Group (Trevor J. Ward)* Hotel chain development pipelines	– Africa needs more quality hotel rooms, and the chains bring their much-needed expertise to the continent, and will create thousands of much-needed jobs.
Kenya	Western Circuit Tourism Association (WCTA)	*Western Circuit Tourism Association (Phelix Obuya)* Inclusive profitable tourism in Western Kenya	– WCTA aims to create an enabling environment for tourism business growth in western Kenya through scenery, institutional development and destination.
Zimbabwe	Religious Tourism	*Ministry of Tourism and Hospitality Industry of Zimbabwe (Runyowa Douglas)* Government policy interventions to shore up religious tourism	– Designation of religious sites as tourism attractions; – Licensing accommodation units for religious tourists; and – Supporting religious conventions.
Angola	Training Programme	*IPDT – Institute for Tourism Planning and Development (Jorge Costa)* Tourism executive master Angola	– Development/training of human capital with the implementation of the Tourism Executive Master (TEM), a tailor made master programme for Angolan senior public managers and officials.

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Pashiyet Chyulu. © Campi ya Kanzi.

Case study Kenya:
Transformative tourism for our sustainable future

Source: Campi ya Kanzi (Barbara Stoddard).

Campi ya Kanzi, an award-winning luxury ecolodge in southern Kenya, has promoted transformative tourism for nineteen years and has changed many lives in the process. Campi ya Kanzi strives to protect the environment and to provide economic benefits to the local Maasai people while also providing unforgettable, enriching experiences for guests. The wilderness, wildlife, Maasai, and visitors all benefit from the mission of the camp.

Campi ya Kanzi – meaning "Camp of the Hidden Treasure" in Swahili – derives its name from the treasure it protects: the precious, pristine wilderness of Kuku Group Ranch. Kuku is a private Maasai reserve located at the foot of the Chyulu Hills between the Tsavo West, Amboseli, and Chyulu Hills National Parks. This land provides crucial corridors for wildlife and protects the water source for Mzima Springs, which feeds the city of Mombasa. Campi ya Kanzi is devoted to preserving this land and works closely with its co-founded non-profit, the Maasai Wilderness Conservation Trust, to ensure a sustainable future. Our guests are eager to give back and to help us accomplish this goal.

Campi ya Kanzi is a proponent of Payment for Ecosystem Services (PES), which are integral to our conservation efforts. We currently support three PES programmes in different stages of development. First, Campi ya Kanzi charges a conservation fee of USD 100 per guest per night to fund MWCT programmes like Wildlife Pays, a compensation programme that reimburses herders for livestock lost to predation. Our guests are thoroughly informed about the

© Campi ya Kanzi.

use of these funds and actively contribute to conservation by visiting our camp. Second, we are supporting MWCT and other conservation organizations in the development of a REDD+ carbon project that will sell carbon credits to ensure the preservation of forests and grasslands in the Chyulu Hills. Third, we are hoping to work with MWCT and the Kenyan government to levy a tax on water sourced from the Chyulu Hills, which will further fund the protection of this crucial ecosystem.

As an environmentally conscious safari destination, Campi ya Kanzi works hard to minimize its carbon footprint and to encourage eco-friendly practices among guests. In fact, Campi ya Kanzi serves as a leader of sustainable tourism with a Gold Eco-Rating, Global Ecosphere Retreat® certification, and numerous awards. The camp derives all electricity and heat from solar panels, crops all water from the rains, and does all cooking on eco-friendly, charcoal-burning stoves. We educate our guests about our sustainable practices and encourage them to conserve resources, not only at camp but after their return home.

In addition to protecting wilderness and wildlife, Campi ya Kanzi also supports the local Maasai community. The members of Kuku Group Ranch own the camp, are involved in every level of its management, and benefit greatly from its presence. The camp employs seventy-six Kenyans – mostly Maasai – who receive valuable vocational training as well as income to support their families. The camp also promotes women's empowerment and small business development by purchasing beaded jewelry from local women's groups. Our generous guests extend our impact by donating scholarships, school supplies, and medical equipment for MWCT's education and health programmes.

Campi ya Kanzi's influence reaches beyond the local community by touching the lives of guests who visit from all over the world. Our guests leave with a heightened environmental consciousness and appreciation for nature. They also gain knowledge about the Maasai and admiration for their culture. Many make marafiki, or friends, among our Maasai staff and keep in touch after they depart. Some even begin fundraising and education campaigns to support our conservation and community development efforts.

Tourism truly has the power to transform, and Campi ya Kanzi has set out to prove that. We aim to transform both the environmental and economic landscapes on Kuku Group Ranch, while also providing our guests with fulfilling, life-changing experiences. We have effected great transformation on Kuku Group Ranch over the last nineteen years and look forward to continuous improvement in the decades ahead.

© Cape Town Tourism - Kirstenbosch Boomslang.

Case study Cape Town:

Tourism product innovation in Cape Town

CAPE TOWN TOURISM

UNWTO AFFILIATE MEMBER

Source: Cape Town Tourism and South African National Biodiversity Institute.

Innovation in tourism product development in Cape Town is driven by market trends, industry competitiveness and a deep-seated commitment to responsible tourism practices and greening existing infrastructure, amenities and attractions. Public sector development is guided by a Tourism Development and Spatial Investment Framework, identifying key staging posts for tourism, access points and development areas.

One of the case studies featured – Africa's first mobile Visitor Information vehicles – was born of changing consumer behavior while the Kirstenbosch Tree Canopy Walkway was initiated as a legacy project, serving as an excellent example of responsible design.

Increased mobility

Cape Town Tourism's new mobile Visitor Information Centre was launched on Friday, 2 May 2014 at the opening of WTM (World Travel Market) Africa – a significant synergy as both the vehicle and the trade event were firsts for the African continent.

The mobile Visitor Information Centre was established in response to a rising trend of visitors using mobile and online portals to access information about Cape Town. The "Thando" fleet – "Thando" means love in Xhosa, one of the eleven official languages of South Africa – gave the organization the opportunity to meet travelers and local citizens where they are.

The mobile Visitor Information vehicles are manned by passionate Cape Town Tourism team members to position an information service in high traffic areas in line with events and seasonal hot spots. The original and largest Thando has a built-in office to assist visitors in making bookings for their stay or buying tickets for events and shows. An attractive relaxation area, featuring locally designed chairs and tables, offers free Wi-Fi to visitors.

The choice of vehicle was deliberate as its Blue Efficiency package optimizes fuel consumption and reduced emissions, whilst boasting eco gear manual transmission and a diesel filter. The entire operations element of the unit is solar powered, emphasizing once again the importance of responsible tourism development.

Five more Thando siblings joined the family in December 2014; a smaller panel van with similar features to the original, two battery-operated bicycles and two scooters with free Wi-Fi.

The Thando team has reported more than 7,800 inter-actions with visitors between the launch and February 2015. This figure represents 22% of overall visitor interactions in the Cape Town Tourism network. This network includes six bricks and mortar Visitor Information Centers located in tourism nodes like the City Centre, at Cape Town International Airport and in development districts like Langa in the Cape Flats, aimed at driving cultural and heritage tourism.

Kirstenbosch tree canopy walkway

Kirstenbosch National Botanical Garden was the world's first botanical garden established to preserve a country's unique indigenous flora and is world renowned for its botanical achievements. Established in 1913 and home to about 7,000 species, it represents the Cape Floral Kingdom, the smallest of the six floral kingdoms of the world. Its home to a conservatory, a section planted with indigenous medicinal plants, a cycad amphitheater in the heart of the garden and the Gondwanaland Garden, featuring plant fossils that are 240 million years old.

Kirstenbosch is South Africa's flagship botanical garden, also offering visitors restaurants, art and photographic exhibitions and local favourites, the Summer Sunset Music Concerts and Christmas Markets. Highly rated for universal accessibility, the garden is easy to navigate by wheelchair users and the Braille Trail and Fragrance Garden were specifically designed for visually impaired visitors.

The idea of a Tree Canopy Walkway in the Kirstenbosch Arboretum originated about 6 or 7 years ago as a concept to attract visitors to a part of the garden which very few people knew about or visited. In 2013 when the garden celebrated its Centenary the concept of a Tree Canopy Walkway became an obvious choice as a legacy project.

Designing a structure that would blend into the forest in an unobtrusive manner and be virtually invisible from most parts of the garden was critical. The design is based on the inverted skeleton of a snake, winding its way through the tree canopy and as a result it became affectionately known as the "Boomslang" (tree snake). It was opened to the public in May 2014 and the Walkway very quickly went "viral" on social media.

The success of the design's aesthetic and artistic value has led to the structure being featured in numerous international and local architectural magazines and it has been recognised as the "Most Beautiful Object in South Africa" (MBOISA) for 2015.

Kirstenbosch was soon swamped by visitors all desperately looking for the "Boomslang". By the end of the 2014 calendar year attendance had increased by 27.5% on the previous year with attendance exceeding 1,000,000 for the first time in the Garden's 101 year history.

Income from gate takings has increased by 48% from 16.9 million South African rand in 2013 to 25 million South African rand in 2014. The increased gate income has meant the capital cost of construction of 5 million South African rand has been recovered in just eight months since the Walkway was opened.

"Sustainability and tourism are not a zero sum game… Kirstenbosch is an example of excellence of how tourism and biodiversity can build a beneficial partnership and contribute to a more sustainable economic model".

Taleb Rifai,
Secretary-General,
World Tourism Organization (UNWTO)

© Kicheche Laikipia Camp.

Case study **Kenya:**

Solid waste management at Kicheche Laikipia Camp

Sound waste management and optimization of resource recovery require concerted effort from the management, and reliable data on solid waste generation and composition. An increasing number of tourism facilities in Kenya are appreciating the need to put up conservation measures or lose out on the resources they rely on due to activities that destroy the environment. Knowledge about solid waste sources and types as well as information on its composition and rates of production and disposal is essential for the design and operational aspects of any tourism facility (Shamshiry, 2011). The application of responsible tourism to protect natural wildlife habitats, innovation in resources conservation and support to community wellbeing has managed to put Kicheche Laikipia Camp on the map as one of the best tourism facilities in Kenya.

Kicheche Laikipia is a small luxurious tented camp situated in the Ol Pejeta Conservancy in Laikipia County, approximately 240 km from Nairobi City. The luxurious camp has been commended greatly due to their waste recycling and reducing techniques. Most significant, Kicheche Laikipia Camp has been awarded Gold level Eco-rating Certification by Ecotourism Kenya for their outstanding and replicable best practices. The camp is guided by its corporate environmental policy which puts emphases on environmental protection, conservation of resources, waste management, compliance to relevant legal requirements and sustainability in areas of operations. The policy is implemented through a well-defined Environmental Management System (EMS) with

clear management plans in water, energy, and solid waste management.

Through the three – 3R's initiative: reduce, reuse, and recycle; Kicheche has made significant reduction on organic, plastic, glass and metallic waste. Waste management begins at source with adequate and clearly labelled bins placed strategically within the premises. Constant staff sensitization and guest briefing is also emphasized. An inventory on the camps waste production is kept and regularly updated for monitoring purposes.

Waste management at the facility, has been achieved through impressive and innovative initiatives. For instance, organic waste is composted in a properly sealed and lockable pit to make manure. Great pride is taken into providing the guests with fresh organically grown vegetables from the manure. While organic waste is used as compost not all of it is put to this use, Kicheche has devised a way of making their own marmalade from lemon skins and honey. Cabbage, potato and carrot peels, spinach and kale sticks are used to make salads and snacks further reducing the amount of organic waste generated to a negligible portion.

Metallic waste tins are re-used to store honey (picture 1) which is harvested from the facility beehive project. Other tins are modified for use as candle holders (picture 2). Through innovation by a staff member with special skills in cutting and remodeling glasses, the wine-glass-bottles are redesigned into flower vases or expertly cut into glasses for water drinking (picture 3). Some of the wine-glass-bottles are also decorated using beads (picture 4) purchased from the local community. The decorated bottles are later used to serve water in the guest tents. Waste glass tins are re-used to put marmalade.

Picture 1: **Tins re-used to store honey.** © Ecotourism Kenya.

Picture 2: **Metallic tins re-used to make candle holders.** © Ecotourism Kenya.

Picture 3: **Glasses for water drinking.** © Ecotourism Kenya.

Picture 4: **Decorated wine-glass-bottles.** © Ecotourism Kenya.

These innovations have assisted to reduce the general plastic and glass waste production for the camp.

Waste tetra-packs are reused for planting indigenous tree seedlings and later transplanted within the camp premises or donated to the local community. Used tires from the safari vehicles are filled with soil and used for growing spices and herbs.

In an aim to reduce plastic waste production, water is bought in 18 liter dispensers and served in 10 liter vessels at the guest tents (picture 7), which reduce on the need to use bottled water. Emphasis is also put on the use of solar rechargeable flashlights (picture 8) to reduce on cell

battery waste. The excess plastic, glass, metallic and electronic waste is sold to licensed recycling firms through Kicheche central purchasing office in Nairobi or disposed through recycling companies in Nanyuki town.

Every business no matter how green, has an impact on the environment in which it operates. It is therefore the responsibility of all tourism facilities to ensure that these impacts are reduced to a minimum to enhance responsible tourism.

Picture 5: **Glass tins used to store marmalade.**
© Ecotourism Kenya.

Picture 6: **Old tires used to grow herbs.**
© Ecotourism Kenya.

Picture 7: **Water vessels at guest tents.**
© Ecotourism Kenya.

Picture 8: **Solar rechargeable flashlights.**
© Ecotourism Kenya.

© Kasto80 | Dreamstime.com.

Case study Morocco:

The untapped tourism potential in Africa

ISITT
Institut Supérieur International de Tourisme de Tanger
المعهــــــد العالـــــي الدولـــــي للسياحــــة بطنجــة

UNWTO
AFFILIATE MEMBER

Source: International Higher Institute of Tourism of Tangier/Morocco
(Mimoun Hillali).

Preamble

This reflection deals with the sustainable development of tourism and its obvious impact on performance. It reminds the professionals about the benefits of the revival of periodic tourist achievements of the past and the project developers (local authorities, public organizations, corporations and private actors) the need to ensure the development of new products. The use of small and medium-sized enterprises (SMEs), or even very small family/associative businesses, in the context of tourism niches, offers real opportunities to capital owners. The creation of companies generating revenue and jobs on a large scale depends on the ability of professionals, developers and investors to combine improvement, innovation and exploration.

Context of the African tourism

Paleoanthropologists locate the origin of the humanity in Africa[1]. Besides, experts and specialists of tourism attribute to the continent exceptional potentials[2] (biodiversity, ethnic and cultural diversity). However, this cradle of natural and cultural heritage struggles to cross the cape of the 60 million arrivals and that of USD 40 billion in revenue[3]. Given these results and the African potential, tourism problem in Africa is apparently human (politics, governance, planning, etc.).

Accordingly, it would be prudent to be careful not to open other sites without seriously ensuring their feasibility and reliability; that is to say, integrating them into the environment in the broad sense of the term. Otherwise, the risk will be double: competing with the existing (already suffering) and jeopardizing new projects or products. It's no longer a secret: African geopolitical situation is difficult and does not favor the development of tourism (conflicts, instability, Epidemics, etc.). Paradoxically, Africa has demonstrated, in recent years, resilience at all levels, despite the crisis of 2008, the Arab spring and violence in the Sahel.

Tourism, a very sensitive sector, needs policies that combine governance, innovation, promotion and respect for the environment. These requirements are unavoidable and are part of the recommended precautions. It is obvious that socio-political instability negatively affects the factors that control the motivations of tourists (issuing countries) in the choice of destinations (station, country, and continent). Gone are the days where the amenities and tourist facilities were sufficient to attract customers (1960s). That is why, experts, researchers and stakeholders in tourism would benefit to harmonize their methods and to properly target the priorities and goals. What amounts to the prioritization of actions taking into account the socio-political context, the nature of the referred potential and tourism initiatives to commit. In other words, the emphasis should be, first,

the improvements of the existing, without neglecting the tourism development potential of the untapped potential. As a last resort, it would be wise, at the present time, to distinguish the possible desirable or the necessary in light of the strengths and weaknesses of each country.

The human potential first

Why concentrate efforts in to improve the existing? The answer is to help institutions and tourist activities in need. This 'existing', which provides income and employment (direct and indirect) to millions of Africans is currently under-exploited. Let us imagine when Africa succeeds in taking off socio-economically. It will be the (tourist) rush to the continent. This will be the right time for exploration and development of the untapped potential: niche tourism, theme tourism, domestic tourism, etc. As for classic tourism, it will be promoted properly by domestic investors who have acquired a good knowledge of the local product and a great experience in the field of tourism. And they will be supported (partnership) or competed (liberalism) by international developers, owners of expertise and capitals. The role of States will be limited to guidance, facilitation and regulation once stability is ensured and prosperity is renewed. That means that we must never neglect any opportunity for development or possibility to even create new wealth.

Table 5.2	Some examples of niche tourism	
Health tourism	1. Thermalism and spa 2. Cure of sand	3. Medical tourism 4. Climatism, etc.
Tourism and water sports	5. Surf, windsurf, kitesurf, sailing 6. Kayaking, canoeing, rowing	7. Submarine diving, etc.
Tourism and aeronautical sports	8. Skydiving 9. Paragliding	10. Hang gliding 11. Gliding, ultralight aviation
Nature and discovery tourism	12. Speleology 13. Parks 14. Lakes, dams and rivers	15. Mountain bike 16. Camel trips and discovery of the desert
Sports and recreation tourism	17. Climbing, hiking 18. Equestrian sports	19. Sport fishing
Memory and worship tourism	20. Visits to holy places, visits of mausoleums, religious pilgrimage, religious festivals, tourism of memory or roots, etc.	

Source: Ministry of Tourism of Morocco (2005).

© Trofoto | Dreamstime.com. - Ait Benhaddour Kasbah in Morocco.

We often hear by tourism potential the whole of the natural and cultural heritage resources. But we must not forget that the human factor is the basis of the successes and failures of tourism development in many countries of the world. Because of the lack of human resources in Africa, the management of large hotels and the feasibility studies, certification and audit are often entrusted to international expertise, in association with national or local institutions. It is a good thing. But it is desirable to incorporate a little more African men and women in this process of cooperation to improve local skills and expertise.

Our study demonstrates the importance of planning, preservation and management of the tourism sector. And to control well these processes, it is necessary to have long-term quality training structures. And for the medium term, targeted ongoing trainings (or upgrades) of actors and executives working in the tourism sector are highly desirable. To avoid scattering, these trainings will focus initially on five axes: safety, hygiene, quality, hospitality and information[4]. It must be said that tourists, regardless of their mode of travel, still have the merit to opt for Africa. The least is to meet their basic needs because the African journey is not done on a whim. Proposals and ideas contained in this text are in the medium term in anticipation of the exit of the crisis (or crises). And when Africa awakes, the world of tourism will flourish.

1. Yves Coppens : Pré-Textes : L'homme préhistorique en morceaux. Éditions Odile Jacob, Paris (2011), p. 187.

2. Groupe de la Banque africaine du développement : Le tourisme en Afrique, une mine d'or inexploitée.
See: www.afdb.org/fr/news-and-events/article/tourism-in-africa-is-an-untapped-goldmine-12796/.

3. According to the World Tourism Organization: Africa realized 55.8 arrivals and USD 34.2 billion in 2013. Source: Faits saillants du tourisme, Madrid, édition 2014, p. 4.

4. International Higher Institute of Tourism of Tangier/Morocco can contribute to the training of trainers in these areas in collaboration with the World Tourism Organization (formations from one week to one month) and roving seminars.

Case study **Africa:**

African aviation set for lift-off

Aviation plays a vital role in Africa's economic, social and cultural life. Given the significant distances and challenging terrain across the continent, aviation is often the best, and sometimes the only, option for efficiently connecting this huge market. Tourism thrives on connectivity, and aviation-supported tourism creates significant economic benefits for Africa – some 5.8 million jobs, and USD 46 billion in GDP. So it is in the interests of African nations to support a strong aviation sector.

The African Union has a stated mission to pursue an integrated, prosperous and peaceful Africa, and aviation is helping deliver that vision. Air transport carries around 70 million passengers into, within and out of Africa annually, facilitating tourism, trade (imports and exports), aid and connecting far-flung communities. And yet, aviation is not an unbridled success story in Africa. The profitability of African airlines is weak, and intra-African connectivity lags behind the growth in connections from Africa to the rest of the world. Safety is still a concern: although Africa has closed the gap, and the best African airlines are as safe as any in the world, the all-accident rate is still higher than the global average. Nevertheless, if these challenges can be overcome, aviation's greatest potential market is Africa.

IATA's 20-year forecast for air passenger growth estimates that between now and 2034, passenger numbers will grow at 4.7% a year from, to and within Africa. Only the Middle East and Asia will be growing faster (at 4.9%) and eight of the ten fastest-growing nations over this period will be in Africa. Those eight are the Central African Republic (9.0%), Madagascar (8.0%), Tanzania (7.7%), Burundi (7.4%), Ethiopia (7.2%), Rwanda (7.0%), Zambia (6.8%) and Botswana (6.7%). By 2034 there will be an extra 177 million passengers flying in Africa.

What are the reasons behind this predicted passenger surge? And what conclusions should policy-makers draw? There are three drivers behind the growth in passenger numbers: living standards, population and demographics, and price and connectivity. Rising

living standards is very important as research shows that countries on a growth curve up to around USD 20,000 per capita see correspondingly faster increases in the number of flights taken per person per year. With African GDP expanding more than 6% and income per person up 30% over the last decade, this is a strong factor behind the projected growth in African air travelers. 15 of the 19 countries expected to move from low-income to middle-income nations in the next 20 years are African, which is significant because people in middle income countries, on average, fly seven times more often than people in low-income countries.

Population and demographics is another big plus for Africa. The continent has a rapidly expanding, young population of over 1 billion. All of the top 20-ranked counties by projected population increase in percentage terms between 2014 and 2034 are African. Altogether, Africa is expected to account for over 40% of global population growth (some 650 million people) over the next 20 years.

The final element behind passenger growth is price and connectivity. Here, Africa does not score so highly. The cost of jet fuel, for example, is higher in Africa than elsewhere. Taxes and infrastructure costs can be high. Perhaps most importantly, intra-African market access is very restricted.

Over recent decades the understanding of the damaging effect of the lack of connectivity has been increasingly understood by African governments. Moves to liberalize the skies began with the Yamoussoukro Declaration in 1988, and in 1999 the Yamoussoukro Decision committed 44 signatory countries to deregulating air services and to opening regional air markets to transnational competition within Africa. The implementation of this visionary agreement, however, has been slow, and the benefits have not been realized.

To quantify the missed opportunities, IATA commissioned the independent economic consultancy InterVISTAS to research the benefits that would accrue if 12 African nations were to implement the Yamoussoukro Decision. The 12 nations in the Report are: Algeria, Angola, Egypt, Ethiopia, Ghana, Kenya, Namibia, Nigeria, Senegal, South Africa, Tunisia and Uganda. The Report demonstrates beyond doubt the tremendous potential for African aviation if the shackles are taken off. The additional services generated by liberalization between just these 12 key markets will provide an extra 155,000 jobs and USD 1.3 billion in annual GDP. A potential 5 million passengers a year are being denied the chance to travel between these nations because of unnecessary restrictions on establishing air routes. That's five million missed opportunities to generate new business, create cultural links, open trade routes or expand educational and social opportunities.

Of course, jobs and economic development are just the tip of the iceberg when it comes to assessing the benefits of aviation connectivity: the impact of greater social, technological and cultural exchange is unquantifiable. So it is significant that the African Union has set goals for reaching the global safety average by the end of this year, and implementing Yamoussoukro by 2017. It means both airlines and governments are united in driving forward crucial improvements for air connectivity. I am an optimist for African air transport – if governments act on their commitments, then Africa will be set for lift-off.

Case study Tanzania:

Eco friendly sustainable camp

Nobody, including ourselves, could have ever imagined that what started out as just a few people in the Maasai lands of Esilalei could have ever transformed into such a harmonious permanent tented camp which so many families and individuals return to.

We have always been very conscious about the way we run our business at Isoitok Camp and have gone out of our way to make accommodation that is sustainable and responsible that simply blends in with its natural surroundings to further enhance and capture the real bush feeling and the true lifestyle of the Maasai of Esilalei. There are approximately 2,500 Maasai living in the Esilalei area which is 13 km from Lake Manyara National Park and "The Great Rift Valley". For the international traveler they are spoilt for choice as to why they should consider a night or two at Isoitok Camp Manyara – whether it be to experience and dive a little deeper into Maasai culture to truly understand their traditions that are part of daily living, or to simply stare in wander at the vistas that fall away from the camp, a haven for birdlife and a "safe place" for families with young children to really experience the African bush before heading off into the National Parks.

Whatever the reasons our story would appear to be a successful one as all who have visited or stayed are left with a truly lasting experience and a deeper understanding as to how a responsible approach in tourism reaches so far and wide and takes very little effort to implement and carry out.

Source: Isoitok Camp Manyara.

© Isoitok Camp Manyara - Sunset in Maasai.

Isoitok Camp Manyara was created and designed with the idea to allow foreign travelers to experience the true life and daily existence of the Maasai whilst taking in jaw dropping views across "The Great Rift Valley" to Lake Manyara National Park.

The experience of staying at Isoitok Camp is an education both in cultural tourism and how to run a business using the environment we have around us. The traveler gets to understand how our Maasai neighbors generally live and what they must endure over the changing seasons. The initiative does not end there as once again the traveler sees first hand and is educated through familiarization briefings as to what is meant by an "eco" friendly "sustainable" camp. We often have guests requesting to be shown around, especially those who have implemented solar, grey water and rain harvesting in their own homes.

Our responsibility in tourism is to aid, educate and give back wherever possible to the Esilaleeii Maasai community at large. Our relationship with the Maasai has stood the test of time and the key to Isoitok Camps harmonious existence is how we treat and have worked alongside our Maasai neighbors delivering more than just words but fulfilling and reaching the goals that together we have set out to do. There will always be other hurdles/goals to work towards a re-access as data is collected, reviewed and improved. This process is a positive step and under supervision and in-house training to all staff members and

selected "Green Team" employees at Isoitok we continue to address key focus areas that through the camps growth will be tackled over a given time. The key areas and goals in part will be closely connected with our ongoing projects and support to our Maasai neighbors.

Furthering UNWTO's ideals of sustainable and ethical tourism has given the Isoitok team a deep sense of pride and refueled energies to push forward with a truly sustainable existence which benefits all parties and further ensure the projects we continue to inject into the community receive the financial support and energy required to do so.

© Isoitok Camp Manyara – Maasai Introduction.

© Tanzania Tourism Board - African wildlife.

Case study Africa:

The Africa tourism
monitor report 2014

The 2nd edition of the Africa Tourism Monitor Report, a joint publication of the African Development Bank Group, the Africa Travel Association (ATA) and New York University Africa House was officially launched at the opening of the Africa Travel Association (ATA) 39th Annual World Congress in Kampala, Uganda on 14 November 2014. The theme of the report, "Leveraging Africa's Human Capacity for Tourism Development", emphasizes the crucial role tourism plays in Africa, as it harnesses the potential to increase trade, create socio-cultural linkages, and spur economic and job opportunities.

The report covers several timely topics like construction of infrastructure for tourism development; regional cooperation; training and capacity building; citizen diplomacy; cultural heritage; tourism product development; hotel chain development pipelines; connecting the continent via air access; inclusive growth and sustainable tourism strategies; and engaging rural communities.

Tourism, as one of the fastest-growing and most dynamic sectors, has tremendous potential to boost inclusive economic growth across the continent and reduce poverty. The World Tourism Organization (UNWTO) projects Africa's international tourist arrivals will rise to 134 million in 2030 – that is an increase of 106% from the 2013 level of 65 million arrivals. One reason for this rise is an influx of new visitors from emerging economies in Asia, Central and Eastern Europe, all seeking to experience the cultural heritage, extraordinary wildlife, and dramatic landscapes unique to our beautiful region.

© Rwanda Development Board - Africa wildlife.

Progress is still needed to promote greater regional integration in terms of lifting travel and visa restrictions. At least two-thirds of African countries demand visas from Africans traveling outside their native land. Greater cooperation is needed between governments to facilitate the trans-border movement of persons within Africa. Several regional economic communities have made some headway in this area. ECOWAS, for example, is developing a common migration policy, while the recently launched single visa scheme between Kenya, Rwanda, and Uganda is a welcome move in the right direction.

Peace and security breakdowns also threaten socioeconomic progress and hard-won gains from the past. A strong commitment from Africa and the international community is required to help address these crises. While risks remain heightened in some regions, a number of conflicts on the continent have been heading towards resolution. Today, most of Africa is at peace and moving toward democracy. In 2014, 15,600 million Africans, including many first-time voters, will go to the polls to elect their leaders.

The recent Ebola epidemic in West Africa has drawn into sharp focus critical national and regional infrastructural challenges in the health and transportation sector, as well as a profound shortage of resources, both financial and human, to tackle the disease. Despite these challenges there is express need for global solidarity with the people of the continent. Africa is one of the most dynamic destination for travelers seeking adventure, exceptional

cultural exchange and heritage tours, diverse culinary experiences, unparalleled safari and wildlife opportunities, first-class beaches and a wealth of investment opportunities.

Given a conducive enabling environment, tourism can serve as a prime catalyst to spur inclusive, green and sustainable growth across the continent. The steady influx of new international travelers from Eastern and Central Europe, South America and Asia – as well as the traditional heartlands of the United States of America and Europe – attests to Africa's enduring appeal as an exciting tourist destination, which needs to be harnessed for the socioeconomic advancement of all its people in the long term.

The full report can be downloaded at:
www.afdb.org/en/knowledge/publications/africa-tourism-monitor/.

© Yann Macherez - Kalahari red dune route.

Case study **Africa:**

Enterprise development programme

open africa
do travel differently

Source: Open Africa (Claire Alison).

Open Africa is a social enterprise that works with small businesses in rural areas to establish tourism routes that offer travelers authentic experiences while generating income and jobs for local people. The routes are used as platforms for rural economic development while also developing small businesses in the process.

A route consists of all tourism related products and services in a geographic area that is defined by local stakeholders and is open to any tourism business or product that buys into the values of the route. On request from a particular community, Open Africa will facilitate a process where the local stakeholders make all decisions, including the boundaries, of the route, who participates and how the route is eventually managed. All of this is captured in a route constitution that is adopted by all members.

Open Africa helps to establish and mentor local associations to manage the routes and builds their management capacity through a tailor made programme. This enables the route management to implement local tourism development projects through a funding mechanism known as a Challenge Fund. Routes can apply to the Open Africa Challenge Fund for projects that benefit local communities, improve local attractions, or help the association with its own financial sustainability.

This programme was recently implemented along Open Africa's Kalahari Red Dune Route in South Africa's Northern Cape Province. The Kalahari Red Dune Route collectively markets and promotes the area to provide direct benefits to 27 participating enterprises that includes entrepreneurs from both local Mier and Khomani San communities.

The founding members of the route recognized the contribution of local communities and the important role their culture plays in attracting visitors. For this reason, both established and emerging entrepreneurs were involved from the outset. The communities benefit directly through income derived from tourism products and services that are offered to visitors and increased jobs in the area. Open Africa helps with market access through a travel portal (www.openafrica.org) and other marketing initiatives.

The Kgalagadi Transfrontier Park is one of southern Africa's most well-known attractions and plays a key role in attracting visitors to the area and along the Kalahari Red Dune Route. The route wanted to leverage the attraction of the park and channel visitors to some of the small enterprises surrounding it.

This resulted in the development of five tour itineraries, each exploring a different area of the Kalahari's natural beauty and unique culture and hospitality. The itineraries take travelers on 4 or 5-day trips through the route and include many of the emerging entrepreneurs on the route. The route manages the booking of these tours and retains a small commission. The revenue generated through this will be used to drive future marketing and development efforts on the route. The partnership with Open Africa allows them to market the experiences online.

Cultural tourism is a key attraction in Africa, but it is important to ensure that communities are not misrepresented or exploited in the process. The collaborative approach taken by Open Africa involves local communities from the outset and they co-create the products while ensuring that the benefits go straight back into their communities. The bottom-up approach prevents exploitation by directly involving them in the decision making process and also empowers them to run and manage their own enterprises.

There is a certain level of skills and capacity required within the community to drive such initiatives and Open Africa plays a key role in building capacity at a local level. A route management programme has been specifically designed for this purpose and gives routes access to an online toolkit with specific resources to help manage routes effectively. Routes are also supported through a local coordinator that provides mentorship throughout the process. Open Africa also offers a business development and mentorship programme for emerging entrepreneurs that covers the fundamentals of managing a tourism business and gives the entrepreneurs access to an experienced mentor in their area.

One of the enterprises along the route is Boesmansrus Grass Huts. Run by Barbara Raats, a member of the local Khomani San community, Boesmansrus offers accommodation for up to eight people in traditional grass structures. In June 2014, Barbara welcomed her first clients and has over the course of 2014 received basic computer literacy training and business management training through Open Africa. She was assigned a local mentor who has played a key role in realizing her dreams. She now employs four people and her inclusion in the tour itineraries will give her businesses an additional boost.

This innovative approach to product development is only possible as a result of the established network and some fundamental shared values such as inclusivity and collaboration. In this way, the value of local community assets is unlocked to benefit local entrepreneurs while driving local economic development.

© Steve Newbould - Glamping accommodation at Kalahari Guest Farm and Farm Stall.

Case study Kenya, Tanzania and Uganda:

Potential of cultural attractions as Counterbalance and/or enrichment of the excessively promoted safari programmes

RUSSIAN INTERNATIONAL ACADEMY FOR TOURISM

UNWTO
AFFILIATE MEMBER

Source: Russian International Academy for Tourism
(Bgatov Andrey and Seselkin Aleksei)

East Africa is very interesting and in due time will become one of the most promising tourism regions in Africa. Among the factors favoring development of tourism in this region of Africa we can note a certain proximity of the territory to Europe and Asia, steady and rather comfortable climatic conditions, existence of fine beaches in many coastal areas, and also the exotic nature. Geographical parameters of the territory were the basis for methodology of a choice of objectives of our research, such as, first of all: interposition of the countries on the relation to each other, to the Kilimanjaro area and the Great African rift.

It should be noted that the tourism in national parks is excessively marketed in East African countries, but at the same time historical and cultural attractions of the region are unfairly forgotten, although many of them are listed as world heritage sites and are under the protection of UNESCO.

© Industryandtravel | Dreamstime.com - Kilimanjaro.

Kenya

In Kenya, traces of early culture of the Middle Ages remain: remains of ring stone fencings, funeral pyramids, irrigation canals; objects of culture of city-states of the coast – Jesus's fort (nowadays the museum) in Mombasa, a column Vasco da Gama in Malindi, etc. These objects of interest, and also the city of Lamu can be recommended for inclusion in new tourist routes together with the visit of national park of Tsavo.

© Michel Bednarek | Dreamstime.com - Giraffe in Tsavo.

Uganda

Cultural objects of Uganda aren't less interesting and attractive to tourists. Among them: the spiritual center of the people of Bogande having for them huge sacred value; the Kasubi Tombs included in the UNESCO World cultural heritage list with a tomb of Muzibu-Azaala-Mpanga dated to the XIII centiry; Royal Palace of Ssekabak. Here the unique opportunity to admire really outstanding architecture reflecting centuries-old technical achievements and cultural traditions of local tribes is presented. Some more surprising objects of Uganda – the city of Kabale, national park of "Bvindi", the reserve "Mgakhinga Gorilla".

© Brian Flaigmore | Dreamstime.com.

© Tanzania Tourist Board.

Tanzania

The territory of Tanzania offers tourists many historical and cultural sites of ancient tribes. The small caves of the Tanzanian province of Kondoa in dense thickets of the bush store the rock paintings which are of historical and art value and were included in 2006 in the UNESCO World heritage list.

Objects of interest to tourists on the island of Zanzibar include: incomparable architectural appearance of the Stone city, in which more than fifty mosques, two Catholic temples, more than ten churches and six Hindu temples, and also a large number of beautiful buildings from a coral stone; Arab fort; National museum; Palace museum; the oldest mosque of Malindi; Persian baths of Hamamni; Natural History Museum; the house where Freddie Mercury was born (then he was called Farrukh Bulsara).

Archaeological research of the medieval city led to the declaration of Kilwa as a World Heritage Site. The list included the Great mosque of Kilwa, Mkutini's palace, and also ruins of other remarkable objects.

Thus, historical and cultural heritage of the countries of East Africa are very diverse. From petroglyphic lists of the first millennium B.C. to the medieval cities, from mythological traditions and ceremonies to modern culture of a masaa, to a bow, from ancient tribes of a nyor and an achola to mythical tribes of "achveza".

The touristic offer is fairly diversified relative to the historical periods of their development.

The immense historical and cultural heritage of the East Africa countries is still underestimated in the "shadow" of safari programmes and other "adventure" routes. However the time for diversification of tourism products and rebranding of tourist programmes in this most interesting tourist region has come. It is necessary to move the emphasis from safaris to the great cultural and historical offer available in East Africa. The theory of a combination of an attractive currency exchange, level of service and safety with large-scale development of tourist infrastructure has to become the most important aspect of a new brand of East African countries. This question is under a constant control of the governments of Kenya, Tanzania and Uganda and is in line with the sustainable tourism development goals and in accordance with the UNWTO principles and GSTC criteria. The cluster approach which is successfully developing in many regions of the world can serve as the foundation for the development of potential of cultural tourism and diversification of product offer in East Africa.

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Case study Africa:

The importance of tourism SMEs for social inclusion and sustainable tourism development in Africa

In the past year, tourism on the African continent has been hit hard by the consequences of the media's irresponsible and generalised coverage of the Ebola Crisis that affected Sierra Leone, Guinea and Liberia. This caused panic amongst tourists, prompting airlines and tour operators to put their plans for travel to the likes of the Gambia, Kenya, Ethiopia, and even South Africa, on hold. This had far-reaching consequences on local economic and social development, with local tourism businesses suffering the most.

Not only has this situation highlighted tourist markets' geographical ignorance of the African continent as well as the perpetuation of the 'Dark Continent' myth; but it has also prompted a renewed focus on the need to re-brand Africa, it's different regions and 53 countries to avoid this situation happening in the future. As a consequence, the UNWTO has called for a continental gathering to address this topic.

In August this year, a *Regional Conference on the Image of Africa: Enhancing Brand Africa, Fostering Tourism Development* took lace in Ghana 17-19 August 2015 with the following aims:

– Analyse the situation of Brand Africa and its impact on tourism in the region;

– Identify the key challenges facing Brand Africa and that of African countries;

Source: Simply Experience Travel (Thomas Armitt).

– Exchange national experiences on country branding and tourism branding;

– Explore how African destinations can successfully build a strong brand in an increasingly competitive marketplace and a constantly changing business environment; and

– Create synergies among African countries towards greater cooperation in the promotion and positioning of a common African Tourism Brand.

But addressing the 'brand issue' is not enough. There will also need to be a focus on how to address the more complicated, and less apparent, issues of fragility of support structures available to small and medium enterprises (SMEs) in tourism across the African continent. SMEs in tourism are the building blocks allowing for positive environmental, social and economic impacts of tourism to be felt on a local level, and if managed responsibly – by mitigating the negative impacts, also on a national level.

With the UNWTO predicting tourist numbers in Africa to reach 134 million by 2030, which will create opportunities for income generation at all levels of the value chain, the potential for tourism induced benefits for local businesses cannot be ignored. Given the right and continued support, these enterprises can be catalysts for social inclusion, creating opportunities for low income people to work within or alongside the tourism sector. With a sustainable

approach to planning for tourism development, initiatives that empower small businesses with knowledge and skills to match the tourist markets' expectations and needs, and micro-credit loan schemes to help bring innovative and socially inclusive ideas to reality, SMEs in tourism could slowly but surely create the foundations for a sustainable tourism sector across the continent.

Social inclusion and sustainable tourism development are hot topics nowadays. They have grown in popularity over the past few years – especially for emerging destinations – as a result of proven positive economic and social impacts that the concept has had in a number of destinations in which inclusive growth tourism strategies have been implemented. Gambia, Rwanda, Uganda and Zimbabwe are some of the African destinations that are case studies for successful best practice.

There are many strategies that can be suggested as part of an action plan for different destinations depending on the context. There is not enough space to share all of them with you here; however it is possible to convey the fundamentals by highlighting some of the recommendations that have already been used as part of national inclusive growth tourism strategies.

The following are only examples taken from a recently updated best practice review. It is important to note that it is not possible to know whether these would work in

Figure 5.1   Increase in cancellations due to the Ebola outbreak*

■ **No change**	(230 operators – 45.5%)
■ **10% increase**	(109 operators – 21.5%)
■ **20% increase**	(56 operators – 11.1%)
■ **30% increase**	(41 operators – 8.1%)
■ **40% increase**	(11 operators – 2.2%)
■ **50% increase**	(34 operators – 6.7%)
■ **70% increase**	(25 operators – 4.9%)
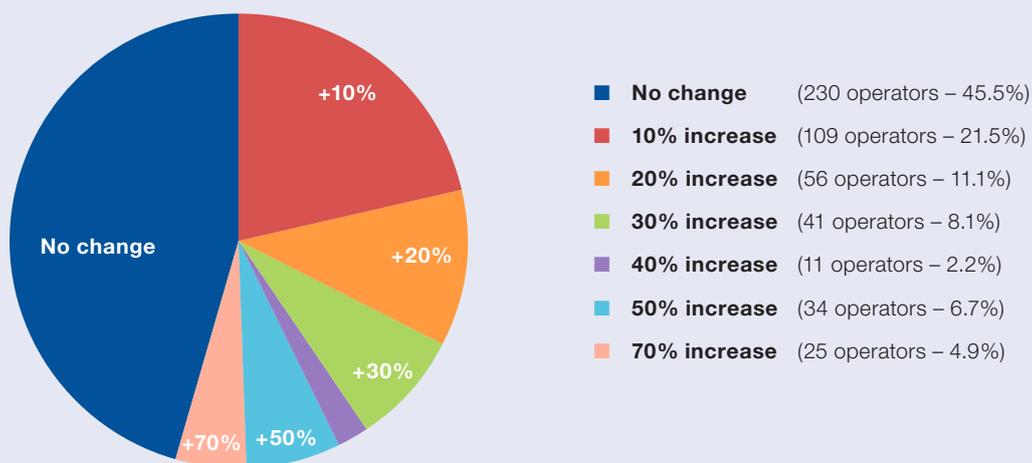
* Show data for operators based in all countries (506 responses).
Source: www.traveldailynews.com/news/article/62410/ebola-is-killing-the-safari.

a particular destination without the appropriate field research or knowledge.

- **Create a strategic lead for inclusive tourism** whereby a position is created within the tourism authority in question ensuring consistency and on-going implementation of action plans with a mandate to keep a clear focus on low-income people, to prevent drift.

- **Expand and diversify arts & crafts** by supporting the expansion of arts and crafts enterprises, through physical infrastructure (markets), investment in capabilities and coordination, and marketing communication.

- **Develop guiding opportunities, cultural excursions, entertainment and heritage sites.** This can involve supporting a guides' association to utilize the potential of experiential and cultural tourism products.

- **Upgrade the food supply chain** by increasing direct market access for local food suppliers (e.g. farmers, fishermen), encouraging tourism enterprises to introduce supplier codes of conduct to ensure fair pricing and trade agreement; building a supportive business environment for local suppliers; celebrating local food as part of the tourism product, and facilitating trading relations between hotels, restaurants and local suppliers.

- **Invest in the development of hospitality skills among Low Income People.** This can be achieved by establishing hospitality training schools that cater to people from low-income households who have the potential but not yet the experience to work in hospitality, and by collaborating with sector partners to provide internships and in house training.

By focusing on the inclusion of low income people within tourism development strategies, by adopting a multi-stakeholder approach, and provided that there is enough demand, tourism can have significant positive impacts on the economy of African destinations, both on local and national levels. Appropriate strategies, depending on the context of the destination, can – if implemented correctly – make way for a tourism sector that can be socially inclusive and sustainable for generations to come.

Figure 5.2 Tourism in Africa (international tourist arrivals)

INTERNATIONAL TOURISM IN AFRICA

INTERNATIONAL TOURIST ARRIVALS

1990
15 MILLION

2014
56 MILLION

2030
134 MILLION

INTERNATIONAL TOURISM RECEIPTS

1990: US$ 11 Billion
2014: US$ 35 Billion

INTERNATIONAL TOURISM AS AN EXPORT SECTOR

7% OF TOTAL EXPORTS
66% OF EXPORT OF SERVICES

Source: World Tourism Organization (UNWTO), 2015.

Case study Kenya:

Protecting livelihoods
and enhancing the visitor
experience on
Mombasa's north coast

Source: The Travel Foundation (Isabel Kearney) and
         UNWTO ST-EP Foundation (Marcel Leijzer).

Tourism is a key economic sector in Kenya, with over 1.5 million international visitor arrivals per year, attracted mainly by the destination's beaches and wildlife viewing opportunities. Mombasa's North Coast is endowed with attractive tropical beaches, and a wide variety of coastal hotels and resorts are operating in the area. The destination can easily be included in tourist package, thanks to the proximity of Moi International Airport in Mombasa, which received close to 190,000 passengers in 2013.

Over the years, many local people started working as beach operator at the Mombasa's North Coast, including safari guides, massage sellers, boat operators, photographers, Samburu warriors and curio sellers. The number of beach operators grew to over 3,000, yet the interaction between tourists and beach operators gradually deteriorated. As no proper arrangements were made to enable the beach operators to sell their products and services, tourists started experiencing the way the beach operators approached them as unpleasant, and hotels and tour operators would encourage tourists to stay within their grounds. This situation made it increasingly difficult for beach operators to earn a livelihood, compounding the problem and leading to ongoing conflict with hotels.

In order to address these challenges the independent sustainable tourism charity the Travel Foundation (TF) and UNWTO jointly set up the three year Mombasa Beach Operators' Livelihood Project to support the long term sustainability of tourism along the Kenyan coast through strengthening livelihoods for beach operators, improving their interaction with tourists, and minimizing tourist hassle. The project was funded through a ST-

EP Destination Management Fund, a partnership between TF, UNWTO and the UNWTO ST-EP Foundation, and was led by the Kenya Coast and Tourism Association (KCTA). The project focused on working with the Mombasa North Coast Beach Operator Association, which has around 1,500 members, and built on the lessons learnt from a similar project with beach operators carried out by TF in Sri Lanka.

Project activities

A number of project activities were undertaken to improve beach operator livelihoods, build effective relationships between beach operators and hoteliers, and improve the visitor experience. A professional training programme was delivered to 573 beach operators (260 female, 313 male), covering a range of topics from basic tour guiding skills to financial management. Stakeholders, such as Kenya Wildlife Service, Kenya Tourism Board, Tourist Police Unit and hoteliers were engaged through sensitization forums and a workshop, where they committed to supporting the beach operators in securing sustainable livelihoods and improving the visitor experience. Stakeholders also attended the beach operator graduation ceremony, where all 573 beach operators were presented with certificates and branded t-shirts to wear whilst working.

As a result of the project, seven hotels now have formal or informal agreements with curio sellers to sell inside their hotel on specific days of the week on a rotation system,

benefitting all 450 members of the curio association. With assistance from KCTA, beach operators have organized themselves into eight associations and revised their code of ethics and constitution. Beach operators have also taken responsibility for caring for the beach environment and have run regular beach cleans to improve the visitor experience.

Achievements

During the final evaluation, 20 beach operators who participated in the project reported improvements in livelihood indicators, including: feeling proud of about their work; feeling respected by the local community; good relationships with hotel workers; and getting on well with tourists. Relationships between beach operators and hoteliers have improved and hotels no longer discourage their guests from interacting with beach operators, whereas some hotels even helped create specific opportunities for interaction. During the baseline project evaluation, a sample of 20 beach operators who participated in the project rated their relationship with hotels – 25% thought it was 'poor' and 45% felt it was 'good'. At the end of the project, 75% of the beach operator sample said their relationship with hotels was now 'good' and the remaining felt their relationship was 'ok'. Regular meetings between beach operator association leaders and hotel security officers mean security issues, such as intruders, can be addressed together. One beach operator said, "they (hotels) respect our work and recognise that we are

© Niserin | Dreamstime.com - Elephants Family On Savanna, Kenya.

professionals". Project participants will become the first Mombasa beach operators vetted and licensed under the Ministry of Tourism's Tourism Regulatory Authority, gaining an official role in the tourism sector.

The Kenya Tourist Board has reported that beach hassle is now the seventh reported reason for visitor dissatisfaction in the Mombasa 2014 exit survey, compared to the primary reason for visitor dissatisfaction in 2010. Hoteliers report that they no longer receive complaints from their guests about negative interactions with beach operators, and are pleased that the project helped to improve the visitor experience, while creating better opportunities for local people to benefit from tourism.

Lessons learned

The achievements of the project demonstrate the success of an approach combining relationship building with the private sector, integrated training and stakeholder engagement to improve the visitor experience along the Kenyan coast and strengthen the livelihoods of beach operators. Neighboring county governments who aim to replicate this project should ensure their programme is based on these three elements rather than a training only approach. To enhance future training programmes, safari sellers could be taken on field trips to a major national park to develop their product knowledge, and representatives of hotels and beach operator associations could undertake study tours to coastal sites where positive interaction between beach operators and tourists exist.

To build on the project's success, all agreements between curio sellers and hotels should be formalized to avoid changes in management disrupting the arrangement, and further efforts should be made to between hotels and other beach operator groups. Hotels could go further by inviting curio sellers to sell permanently inside their hotels, and offering different products in their own shops. Along the Mombasa North Coast, efforts can be made to integrate all beach operators under one single, inclusive beach operator's association, which would create better opportunities to reach all beach operators with training and business linkage facilitation activities, and could reduce conflict between different factions of beach operators.

Replication and scale-up

Key decision makers and tourism businesses have shown commitment in supporting the livelihoods of beach operators and scaling up the project – Mombasa County Governor H.E. Hassan Joho publically pledged to fund and support a further 500 beach operators through the programme in the next year.

The project's success has attracted interest from County Governments neighboring Mombasa: Kilifi ran a 10 day training course for 200 beach operators, Kwale is interested in delivering a capacity building project for beach operators, and Lamu held basic training for beach operators on communication and selling skills. The project could also be expanded to reach tuk-tuk riders and taxi drivers, where visitors are reporting problems with overcharging, security, and stopping at commission paying shops.

For more information on the project, visit: www.thetravelfoundation.org.uk/projects/destinations/kenya/past_projects_in_kenya.

© Tom Gowanlock | Dreamstime.com - Restaurant.

Case study Africa:

The sustainable tourism certification Alliance Africa (The Alliance)

The Alliance is a network of sustainable tourism certification stakeholders in Africa aiming to enable an integrated approach to sustainable tourism certification throughout the African continent.

The Alliance's overall objectives are to build regional capacity to reduce poverty, improve livelihoods, and promote resource efficiency through sustainable tourism management practices. More specifically, the Alliance facilitates an integrated approach to sustainable tourism standard setting and certification that will achieve higher levels of market and developmental impact, as opposed to certification schemes operating in isolation of each other. To date, all operational sustainable tourism certification schemes on the continent have joined this Alliance: So far, they include certification bodies operating in Botswana, Egypt, the Gambia, Madagascar, Mauritius, Morocco, Mozambique, Kenya, Namibia, Seychelles, South Africa, Tanzania and Tunisia. To find out more about these certification bodies and their products please visit: www.sustainabletourismalliance.net.

Taken together, there are hundreds of businesses from many different segments of the industry that are certified by an Alliance member. The following are just two examples from South Africa and the Seychelles.

Source: The Sustainable Tourism Certification Alliance Africa (The Alliance).

Mashovela Bush Lodge

Mashovela Lodge is a Small Enterprise in the Morning Sun Nature Reserve. It is part of a natural heritage site situated in the heart of the Soutpansberg Mountains in South Africa's Limpopo Province, 75 km from the Zimbabwean border. When it opened in 2009, it was soon recognized nationally for its eco-friendly accommodation, strong local community benefits through its employment of local staff, its educational initiatives as well as its support of local community arts and crafts.

The theme of the Lodge is based on the local Venda Culture, represented in all the materials and patterns used in the rooms and restaurant. The award winning Drumbeat restaurant serves delicious pan-African cuisine. Whilst enjoying dinner guests can listen to the sound of beating drums and dance, in stunning live performances by local Venda musicians.

Since 2012, Mashovela Lodge has been certified by Fair Trade Tourism, a globally recognized and groundbreaking responsible tourism certification programme. Certification of the lodge signifies the businesses' commitment to fair and responsible tourism. This includes fair wages and working conditions, fair purchasing and operations, equitable distribution of benefits and respect for human rights, culture and the environment.

Fair Trade Tourism certification has identified a number of positive business practices by the lodge, such as exemplary labor standards and a high level of cultural sensitivity. A number of well-received recommendations for improvement with respect to all these areas were also identified, particularly in relation to skills development imperatives and how these could be linked to the businesses performance management system. Overall, the certification audit process and steps taken by the business to ensure compliance against Fair Trade Tourism requirements has improved Mashovela's environmental and business performance and has resulted in a more engaged and happier staff.

© Emotionart | Dreamstime.com - Vallon Bay.

The Berajaya Beau Vallon Beach Resort and Casino

The Berjaya Beau Vallon Bay Resort and Casino is located on the North Coast of the Seychelles' Mahe Island, on the popular Beau Vallon Beach. The hotel boasts 232 rooms and is spread over a large property. Maintaining the grounds and landscaping efforts during this period is a challenge. The Seychelles suffer from periods of drought every year and it is a difficult time for everyone as water restrictions are applied across the country.

Through certification, the Seychelles Sustainable Tourism Label (SSTL) has encouraged the hotel to look at rainwater harvesting. Through the provision of tanks and collection of rain water the hotel has managed to better maintain its grounds and keep its landscaping to a desirable standard.

As part of the SSTL requirements the hotel has also set up its own composting for green waste and this further goes towards the maintenance of the grounds and has greatly reduced the cost of buying compost for the hotel. Additionally, the SSTL certification has benefited the hotel by increasing staff awareness on sustainable practices, and the importance of reducing wastage. Efforts to better manage energy and water consumption is now in place through the provision of low flow devices at the guest toilets, guest information on importance of water and need

to change linen less often. 100% LED lights throughout the public areas, cooling systems for the guest rooms are set on a minimum of 23 degrees and key cards assist in switching off lighting in the rooms when guests are out.

SSTL has also encouraged the hotel to become more actively involved in its local community through a number of donations and activities. The hotel has a well-established partnership with the Beau Vallon Primary School, where the hotel has funded the creation of a spice garden, which is grown by the students and the produce sold back to the hotel. The hotel also supports the old people's home of the Beau Vallon District.

Case study **Africa:**

The high-end tourism market: a local luxury

When Vamizi, a luxury resort off Mozambique's northern coast, won the Conde Nast Traveler "Best Hotels for Honeymooners" award in 2014, the magazine heralded the British investors who built the lodge as "idealists.[1]" The group has been praised for using high-end tourism to fund conservation and support community development projects[2] on a seven-and-a-half-mile long island that they share with a poor fishing village[3]. While the combination of social good and luxury is great PR - Nelson Mandela stayed here after all[4] - the socio-economic impact numbers don't add up.

The villa resort charges USD 39,795 for a seven-night-stay[5] from which every guest pays a conservation fee[6]. That levy is USD 20 or 0.05% per reservation. While revenues from the levy are reinvested in the community, the amount the resort sows is statistically insignificant when compared with the amount it reaps.

What if rural villages could benefit from the wealth-generating power of tourism's luxury receipts – not the small change – like foreign investors do? What if the son of a father who renovated homes founded the next 5-star hotel chain like Four Seasons Founder and Chairman Isadore Sharp[7]? What if governments in Africa didn't depend on multinational companies to attract high-end tourism businesses, instead contracting with its own citizens?

That is the vision Transformative Tourism Development Group seeks to bring into focus - local community groups capitalizing on the luxury of tourism's full potential. The Vamizi "ideal" is not an exception. In fact, host communities

in Sub-Saharan Africa are the poorest they have ever been despite extraordinary growth over the last two decades. In 1993, 25% of the world's poorest people, 5% lived in sub-Saharan Africa. By 2008 – the most recent figure available – it had jumped to nearly 60%[8]. During the same period, visitors spent more than USD 600 billion in the region.[9]

More worrying is that barriers to inclusive growth appear to be widespread and accepted as okay. "More is better? Why?" questions Hannah R Messerli, World Bank.

Senior private sector development

Specialist in Tourism in response to a comment that luxury lodges pay local staff poverty level wages in rural villages. Stop "making the assumptions they want to be middle class."[10]

Messerlli, who is the Team Leader of a USD 39.5 million tourism development project in Ethiopia[11], asserts that when indigenous people choose to live in remote areas they do not have a need for more money because there is nothing to spend it on. Maybe this is the reason why the percentage of tourism revenue leakages in Africa is the highest in the world, as much as 85%.[12]

A true Middle class is a better life sans struggle and strife. In fact, global travelers buy into the USD 473 billion[13] sustainable tourism movement, assuming that is what their vacation money is working towards.

But this is the real picture. Visitors can spend a half a trillion dollars in Sub-Saharan Africa, where returns on tourism investment are among the highest in the world[14], and the money is still not effective in promoting shared prosperity. It has the opposite effect on incomes, and has no effect in reducing the share of women and children living on less than USD 1.25 a day. This paints a capitalist picture of blithe indifference.

However, this is the sustainable reality: Tourism's cash flow needs to be redirected away from large multinational corporations and mega businesses and to the local population. This will, in effect, change the systems that lead to poverty. Making it happen is not impossible as pessimists profess.

Two years ago, Transformative Tourism Development Group, a hybrid company that follows a traditional for-profit business model in order to pursue a social mission, set out on an ambitious challenge to break the cycle of poverty by teaching the bottom of the pyramid the ways of luxury tourism at the top of the pyramid.

Why specifically luxury? The demographic is high-value, low-volume. So it is no surprise that 8 out of the top 11 most expensive resorts in the world are in Sub-Saharan Africa[15], charging as much as USD 7,000 per couple per night[16]. GOP margins for hotels in this hemisphere are upwards of 50% of total revenue. Some up to 65%, according to a questionnaire by the World Bank Group[17]. That is the kind of free market vehicle that brings about

transformative change. And with 5-star constructions dominating the hotel development pipeline, there are no signs of a slowdown.

Taking a cue from the Millennium Development Goals that end this year, Transformative Tourism identified six specific and measurable development goals to achieve by 2030. They are:

1. Create local ownership to compete with luxury brands like & Beyond and Four Seasons;

2. Build an executive training factory of small and medium size businesses to engage in the tourism value chain, specializing in high-end markets;

3. Connect entrepreneurs to an assured regional and global marketplace, using the company's vast contacts;

4. Empower the revitalization of abandoned UNESCO African World Heritage Sites into commercially viable, must-visit destinations;

5. Advance education with a scholarship fund for college and graduate school; and

6. Fund all of the above with impact investment capital.

Transformative Tourism's 2030 vision would be facilitated by a high-end resort, where the commercial revenue funds an infinite investment stream to accomplish 1 through 5 in a designated country. The multimillion dollar funds will be assigned to the poorest, most vulnerable sites with distributions that are predictable and consistent, at the

minimum. In the 70-year history of UNESCO, that has never been done before in the region.

Impact investors look for projects to fund that will first and foremost have a significant social and economic impact. For all of its promise, it is not truly understood beyond the philanthropic world. That is because it is founded with the new idea that for-profit, investors will sacrifice market returns in order to invest in a better world. (They also like throwing around anti-establishment words like disrupt, radical and revolution, which are words tourism needs to reaffirm a centrality of growth.)

Arguably, the fastest growing segment in the investment space, impact investors control less than USD 40 billion in capital that is projected to grow to USD 500 billion within the decade[18]. Currently, 15% goes to Sub-Saharan Africa, ranked third after United States and Latin America and Caribbean[19].

Transformative Tourism has identified notables in the space that are asking the right questions. Questions like: Why are almost all of the tourism jobs in the region low-skilled, low-pay? Can we break that pattern? "We now know that job creation in itself does not solve issues like inequality and environmental degradation," says Pascal Fröhlicher, Partner at Johannesburg and Cape Town-based Impact Amplifier. "Yet tourism and agriculture are ideally placed to bring prosperity to remote areas challenged by weak infrastructure and difficulty in accessing markets and capital." Patricia Chin-Sweeney, Director & Partner at Nairobi-based I-DEV International sees "significant opportunity to grow market potential in community-based tourism" and is already doing so in Peru. And GATETrip,

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the world's first Impact Investment platform for the tourism sector and the first to incorporate equity-based Crowdfunding, is vetting potential investors for projects upwards of USD 5 million.[20]

More importantly, impact investors commit to projects long term. The SME development training programmes Transformative Tourism is offering won't provide solutions that will happen overnight or even five years. But everything about the work is designed so that, at some point, the company slips away and local businesses are left with the political and economic power connections to thrive like a foreign investor.

The company's pilot project is a private resort in Central Mozambique that will restore the whole island of Mozambique Island, the country's first and only UNESCO World Heritage Site. It will cost roughly USD 200 million[21].

Visitor management plans will include everything you would expect to find in a small coastal town, including a high-end hotel, B&B, shops, museum, restaurants and coffee shops.

The key is that the newly trained local SMEs will have exclusive rights to manage and own the self-contained site of tourism clusters. Done right, the Global Heritage Fund says a contemporary site can produce more than USD 100 million a year[22].

Not only is it doable, but it will be a testament of what can happen across local economies - across the continent -when profits stay and are truly reinvested. "I may not see the fruits of this labor but the generation after me will. Isn't that the point?" says Vincent Molinari, CEO and Founder of Gate Global Impact, parent company of GATETrip.[23]

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Case study Senegal:

The cultural heritage of the Island of Gorée as a tourist resource

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UNWTO
AFFILIATE MEMBER

Source: University of Bologna (Elisa Magnani).

Gorée: a short history

Despite being very small, Gorée has always played a significant role in African history, as a consequence of its position in the middle of the commercial routes among Europe, Africa and the Americas (Renaudeau, 1985). Since its discovery in 1444, Portuguese, Dutch, French and English armies fought to conquer it and, finally, at the end of the XVIII century, France obtained its full possession, making it the center of its empire in West Africa and using it to control the triangular trade. In fact, despite its demographic growth and the building of its beautiful stone houses, Gorée was a storehouse for human beings until the second half of the XIX century, when its downfall started and its demographic and architectonic decay began (UNESCO, 1985). Today it counts little more than 1,000 inhabitants, the majority of whom live in very poor conditions, with many among them squatting the historical state-owned buildings.

Tourism in Gorée

Despite the poverty of its inhabitants, Gorée is a very popular destination for the tourists staying in the area around Dakar. Already in the 50s and 60s Gorée was a tourist destination for the rich French bourgeoisie, but it is only in the 80s, after its inclusion in the World Heritage List, that tourism boomed, together with an architectonical rehabilitation of some of the historical buildings, due to a worldwide fundraising campaign, promoted by UNESCO

and the Senegalese government. The island became renowned worldwide as the symbol of the slave trade, with its Maison des Escalves and the Door of No Return, and it was included in several mass tourism packages managed by European tour operators.

Nowadays, the island is visited yearly by some hundred thousand tourists, most of whom spend only a few hours on the islands, leaving very little revenue to the local population, who cannot fully sustain their living through tourism, while facing very serious environmental impacts and having to compete with the tourists for the access to resources such as water.

In fact, the island's tourism never fully developed, because – until recently – the local administration has never implemented an integrated tourist system and a successful marketing strategy.

Gorée was inscribed in the World Heritage Sites List in 1979, after the IV criterion that protects those places representing an outstanding example of a building technique or architecture of a significant moment in history: it is the living representation of the slave trade era, when the slaves built its stone houses.

However, the tourist promotion of Gorée has focused nearly exclusively on the Maison des Esclaves, leaving unused its other cultural and natural resources: the other museums, the basaltic cliff and the sea, the charming atmosphere of its narrow, blooming streets.

Gorée as a place of memory

The slave trade has created a transnational cultural space, inside which places like Gorée share a fundamental role in keeping the memory of this episode of the world history, while contributing to the creation of the identity of both black and white people around the world. These places attract both cultural and "root" tourists, in search for their lost African origins and their self-identification (Coles, Timothy, 2004). To protect the places connected to the slave trade, UNESCO has promoted since 1994 an inter-continental cultural itinerary called Slave Route, aimed at promoting them, their architectural and cultural heritage, and helping develop the living conditions of its inhabitant.

Clearly, Gorée tourist development would benefit greatly from a greater connection to the UNESCO Slave Route, focusing, nonetheless, on an improved promotion and a wider use of its resources that would impact positively on its economy and on the lives of its resident population.

Conclusions

In Gorée the connection between tourism and culture is partially problematic: history has turned it into a tourist place, in particular since the inclusion in the World Heritage List, but, despite the development opportunity brought by tourism, its territorial and social problems have worsened in the last decades – mainly as a consequence of bad governance – while its local population has been unable to improve its living conditions through this activity, exposing this living symbol of the slave trade to the risk of being neglected, mystified or fully commercialized to the tourist industry.

Case study Tanzania:

Natural resource management and stakeholder conflict

Tourism has become an essential part of Zanzibar's economic development. In the last two decades the economy has been restructured away from exports to the service industry as it has become an increasingly popular holiday destination. In 2007 tourism delivered 43.9% of Zanzibar's GDP (Ministry of Health and Social Welfare, 2009). With warm blue water and white sand beaches, tourism to Zanzibar is largely dependent on the existence of these romanticized natural resources. Zanzibari livelihoods are also heavily dependent on marine resources. The manner and rate of resource consumption is negatively impacting the environment (EcoAfrica, 2005; Käyhkö et al., 2011). Livelihoods and tourism are competing for natural resources. On the one hand tourism relies largely on 'pristine' beaches and reefs; on the other hand livelihoods rely on fishing along those reefs. The future of both depends on the long-term persistence of these marine resources.

About 2.4 km off the north-east coast of Zanzibar is Mnemba Island. It has a vegetated coastline of 1.46 km and an area of 0.12 km^2. It is an important conservation area for not only marine resources but also the rare Ader's Duiker (Cephalophus adersi) that has a small population on the island. Mnemba is surrounded by a fringing, shallow water coral reef. Portions of the reef are considered to be among the healthiest coral reefs in the region (Bergman & Öhman, 2001; EcoAfrica, 2005; Muhando & Francis, 2000; Wagner, 2007; Zvuloni et al., 2010). The Mnemba Island Marine Conservation Area (MIMCA) was established

in 2002 to protect the marine resources around Mnemba Island. The MIMCA is a popular tourism destination: Many tourism operations from Zanzibar take their patrons to Mnemba reefs for snorkelling and diving. It is a significant contributor to Zanzibar's economy and the economic welfare of communities living along this stretch of coastline (www.mcu.go.tz).

The reef system is being damaged due to poor utilization practices such as anchors landing on coral, tourists and fishermen walking on the coral at low tide, and over-fishing. Through these damaging practices, the tourism industry has been putting pressure on the environment (Ferrol-Schulte et al., 2014; Rotarou, 2013). Professional divers who frequent MIMCA have reported that sightings of reef sharks are infrequent, and that the preferential fishing of herbivorous reef fish has led to increased growth of algae on the reef, choking hard corals (Personal Communications with Dive Masters in Zanzibar, Tanzania, 12 March 2015).

Due to the decline in health and distribution of natural marine resources, governance has become a vital topic of discussion. Despite this, effective governance has been difficult to implement due to stakeholder conflict over resources. Local fishing communities feel that they have been sidelined during MIMCA decision-making, and that they do not receive benefits from MIMCA tourism (Personal communications with Zanzibarians living adjacent to MIMCA, 11-18 March 2015). A member of the

Conservation Club, a committee of local staff members working at a dive resort said "Villagers are complaining because they get nothing from MIMCA, so they don't care about protecting the reef at Mnemba".

In the case of the MIMCA, it can be said that weak working relationships between stakeholders has led to damaging methods of resource utilization. Mnemba Island and the surrounding reefs are an important resource for both the livelihoods of local communities and the Zanzibarian economy. As such it is an important area to protect and manage in a way that enables multiple stakeholder groups to benefit.

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Case study **Africa:**

The march of the hotel chains

W HOSPITALITY GROUP

A very large proportion of investment in tourism goes into the lodging industry – hotels, resorts, lodges and other types of accommodation used by travelers. In Africa, aside from the mature markets in the North Africa region (mostly Egypt, Morocco and Tunisia) and in South Africa, most cities are under-supplied, with existing hotels often badly in need of renovation or, in the extreme, demolition!

The international chains have "woken up" to Africa in the last decade, actively seeking prospective owners who will engage them to manage their new hotels. Several chains now have dealmakers based in Africa.

Each year, the W Hospitality Group analyses the "development pipelines" of the international and regional (African) chains, the deals that they have signed with developers, to show how the hotel industry in Africa is set to grow over the next few years. We analyze the data by company, by brand and by country, and when the hotels are likely to open.

Until recently, the most activity was in North Africa, countries with mature tourist industries, within easy reach of source markets in Europe, and generally considered more attractive than those below the Sahara. But as shown in figure 5.3, the number both of hotels and of deals in Sub-Saharan Africa exceeded those in North Africa in 2013, and in 2015 are 70% higher in terms of rooms.

Source: W Hospitality Group, Lagos (Trevor J. Ward).

Table 5.3   Hotel Chain Development Pipelines in Africa, 2015

	2011		2012		2013		2014		2015	
	Hotels	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**
North Africa*	75	17,038	77	17,217	73	18,065	73	16,449	79	18,565
Sub-Saharan Africa	76	13,700	100	17,109	115	18,191	142	23,283	191	31,150
Total	**151**	**30,738**	**208**	**34,326**	**188**	**36,256**	**215**	**39,732**	**270**	**49,715**

* Algeria, Egypt, Libya, Morocco and Tunisia.

Figure 5.3   Chain Hotel Development in Africa
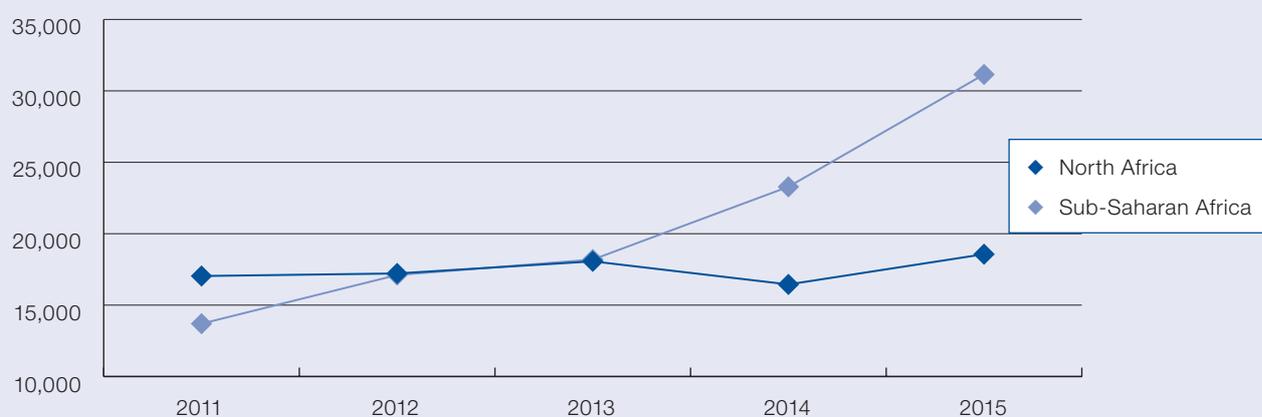
By region, North Africa and West Africa have the largest pipelines, accounting for 70% of the total:

Table 5.4   Hotel Chain Development Pipelines: Top 10 countries by number of rooms, 2015

		Hotels	**Rooms**	**Average size**
1	Nigeria	51	8,563	168
2	Egypt	18	6,440	358
3	Morocco	31	5,474	177
4	Algeria	13	2,749	211
5	Tunisia	12	2,444	204
6	South Africa	13	1,662	128
7	Kenya	8	1,510	189
8	Libya	5	1,458	292
9	Ghana	8	1,399	175
10	Uganda	9	1,397	155

The average size of a new hotel in North Africa, particularly in Egypt, is larger than those planned in the rest of the continent. All 5 countries in North Africa appear in the top ten, and note that the other five countries are all English speaking. Rwanda and Senegal, both French-speaking, head the next ten.

Generally speaking, the main focus of hotel development is in the capital cities of each country, although Lagos (the commercial capital of Nigeria, but not the political capital) has the highest number of rooms in the development pipeline, a total of 3,611, double that of Algiers.

Of the brands operated by the chains, Radisson Blu, a Carlson Rezidor brand, has the largest pipeline, 5,372 rooms in 22 hotels. Hilton has slightly less, around 5,000 rooms, but in much larger hotels.

	Rank by hotels			Rank by rooms		Change (%)	Average size
	Brand	Hotels		Brand	Rooms	2014	Rooms
1	Radisson Blu	22	1	Radisson Blu	5,372	23.9	244
2	Hilton	16	2	Hilton	4,965	5.1	310
3	Marriott	11	3	Marriott	2,316	9.5	211
4	Park Inn by Radisson	10	4	Sheraton	1,862	29.6	233
5=	Hilton Garden Inn	9	5	Hilton Garden Inn	1,682	33.1	187
5=	Noom	9	6	Kempinski	1,618	3.3	324
7	Sheraton	8	7	Park Inn by Radisson	1,581	-17.3	158
8=	Four Points by Sheraton	7	8	Noom	1,332	12.9	148
8=	Golden Tulip	7	9	Four Points by Sheraton	1,250	37.5	179
8=	Mantis	7	10	Courtyard by Marriott	1,154	0	289

Most of the names in the top ten will be familiar, with the possible exception of Noom. This is a new brand from the Mangalis Hotel Group, with nine hotels in their pipeline; none yet open, but expecting to enter the Conakry and Dakar markets in 2015.

The above table details the pipelines by brand. Several chains, such as Hilton Worldwide with Hilton and Hilton Garden Inn, and Carlson Rezidor with Radisson Blu and Park Inn, have multiple brands which they are rolling out across Africa. The following table shows the top ten companies:

Table 5.6 Hotel Chain Development Pipelines: Top 10 chains by number of planned hotels and rooms, 2015

	Rank by hotels			Rank by rooms		Change, 2014 (%)	Average size
1	Marriott	36	1	Hilton Worldwide	7,250	18	250
2	Carlson Rezidor	32	2	Carlson Rezidor	6,953	11	217
3	Hilton Worldwide	29	3	Marriott	6,412	22	178
4	Starwood	21	4	Starwood	4,623	32	220
5	Mangalis	17	5	Starwood	2,329	5	137
6	Swiss International	16	6	Accor	2,273	43	189
7=	Accor	12	7	Rotana	1,955	34	244
7=	Best Western	12	8	Swiss international	1,738	150	109
9	Rotana	8	9	Kempinski	1,618	3	324
10	Louvre Hotels Grop	7	10	Fairmont	1,277	366	319

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Hilton Worldwide is in top position, followed by Carlson Rezidor and Marriott – following their acquisition of the Protea chain in 2014, Marriott's pipeline has increased considerably. Mangalis, with their Noom, Seen and Yaas brands, enters the top ten with 2,329 rooms in 17 hotels, a considerable achievement for a new chain.

The above paints a very positive picture of hotel development in Africa in the coming years. But without wanting to dampen any enthusiasm, the data need to be read into the context of the realities of the hotel industry, and of Africa. Many of these deals represent pieces of paper only, not bricks and mortar. Just over one third of the rooms in the chains' pipelines are yet to start construction, and some of those which have started have stalled. The majority of the chains (and there are one or two exceptions), do not invest, but are seeking investors to build these hotels for them to manage. Raising the finance, and getting a hotel built, takes time, and opening is quite often delayed.

That having been said, the 2015 pipeline is the largest ever. Africa needs more quality hotel rooms, and the chains bring their much-needed expertise to the continent, and will create thousands of much-needed jobs, contributing not only to Africa's tourism industry, but to the development of the continent as a whole.

Case study **Kenya:**

Inclusive profitable tourism in Western Kenya

Western Circuit Tourism Association (WCTA) is a non-profit organization, which was established in the year 2009 by tourism stakeholders in the Western Kenya circuit for two main reasons:

1. Tourism is a fast growing industry in Kenya and is one of its greatest foreign exchange earners; and

2. That tourism potential of the western Kenya circuit is not fully exploited.

The mandates of Western Circuit Tourism Association (WCTA).

– Advocacy on favorable tourism policies through the various institutional frameworks;

– To promote and market tourism in the western Kenya Circuit as an eco-tourism hub and as potential key tourist destination with niche products;

– Support preservation of culture/heritage; and

– Support conservation of wildlife in order to increase visitation in the country in the country´s 2030 vision.

Western Circuit Tourism Association (WCTA) is a big partnership whose aim is to showcase the tourism potential of the western Kenya Circuit and also to provide a market opportunity to members in the line of working out their Market Plan and marketing their products and services.

Source: Western Circuit Tourism Association (Phelix Obuya).

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Our Mission is to be a vibrant and leading Tourism Association working for inclusive profitable tourism in Western Kenya.

Our Vision is to create an enabling environment for tourism business growth in Western Kenya through scenery, institutional development and destination.

Table 5.7 Profile of Western Kenya		
Regional strengths relative to leading international destinations	**Weaknesses**	**Threats**
– We are a renown destination; – We have strong tourism products (sun, beach, wildlife, culture); – Sport tourism – athletes; – Unique scenery and landscapes recreation; – Unexploited historical sites; – A group of motivated entrepreneurs with a common goal; – Extensive and deep rooted sector knowledge; and – Abundant skilled work force.	– Unfriendly policies; – Lack of proper networking; – Lack of infrastructural development in terms of tourism facilities; – Lack of proper information center; – Lack of proper product diversity; and – No international exposure of the sector.	– Political instability; – Insecurity (terrorism); – Climate change and its impacts; – Media; – Negative travel advisories; – Natural calamities; and – Higher operational costs.

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In 2010, a new Constitution was passed in Kenya that provided for the devolved governance hence 47 administrative Counties were formed. In chapter 11, section 196 the constitution states that there shall be public participation in the key decisions passed by the Counties.

WCTA has hence played a key role in the following ways:

– Organizing and participating in the Governors' roundtables that offer a platform for assessing the achievement of the Counties and the gaps available in the management of the public funds.

– Engaging the Department of Tourism in each Counties in drafting and developing holistic Tourism Laws that are investor-friendly and business oriented. In most cases, the Counties have drafted bills which are not sector friendly and we have always been on the fore front in ensuring that the bills are amended to suit the needs of tourism dynamics in each County. WCTA has engaged legal specialists in developing policy papers and have always advocated for best practices in the eleven Counties.

– During our participation in the county government forums, WCTA have always been watchdogs and whistleblowers for the tourism sector in ensuring that profitability of the sector is well tailored to create sustainability and to improve the living standards of the local population.

– Through Public-Private Partnership, WCTA has developed strategic liaisons with key stakeholders. We have worked very closely with the Kenya Association of Manufactures, Kenya National Chamber of Commerce and Industry in ensuring that the value chain is completed for the sake of the community.

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Case study **Zimbabwe:**

Product diversification in Zimbabwe: a look at religious tourism

Source: Ministry of Tourism and Hospitality Industry (Runyowa Douglas, Director
for Policy, Research, Plannings and Development).

Tourism in Zimbabwe is based on its natural resources, culture and pristine wildlife environment. Overall, the product base is narrow and this limits the activities that tourists can undertake during their stay in the country, Saunders, et al (2013). The Government of the Republic of Zimbabwe has approved a new National Tourism Policy which identifies the need to expand the tourism product. Religious based tourism is identified as one of the many niche of tourism products to be developed in Zimbabwe.

Defining religious tourism

Religious or faith based Tourism is probably one of the oldest forms of tourism globally. During the time of Jesus Christ, it was traditional for worshippers to ascend to' Jerusalem at least three times per annum for each of the biblical harvest festivals, marking some of the early documented forms of religious-based tourism. Lefebvre (1996), defines religious based tourism as consisting of a range of spiritual sites and associated services, which are visited for both secular and religious reasons. Shrines encompass sites where a relic or image is 'venerated', whereas pilgrimage sites are places where it is recognized that a miracle has occurred, still occurs and may do so again. An example of the latter is Lourdes in France. Religious tourism, therefore, encompasses all kinds of travel that is motivated by religion and where the destination is a religious site.

Slice of the global religious tourism pie

According to UNESCO (2013), 60% of the world's population practices a religion and these believers form the global demographic base of religious tourism. It is estimated that 300 to 330 million pilgrims visit the world's key religious sites every year and this amounts to about 30% of the total global tourists. The report acknowledges that trips for religious reasons have multiplied over the past decades for pilgrimage, the fulfillment of pledges, religious celebrations, visits to notable buildings and monuments of a religious nature and offerings to divinities among others.

Challenges of measuring religious tourism

Religious-based tourism is not well researched and documented and resultantly, there is limited reliable statistics regarding its size and value within the tourism sector. Only a few countries measure tourist arrivals using a classification that refers to 'religion' or 'pilgrimage' tourism. Consequently, most religious tourists are combined with 'other leisure' visitors, with most countries classifying international inbound tourists into three purpose-of-visit groups: leisure/holiday; other leisure; and business/conference. There are exceptions to this, mainly in destinations where religious-based tourism is highly popular such as Israel and Saudi Arabia where religious-based tourism is the most significant type of tourism,

and consequently the authorities measure it as a clearly defined activity.

Measures to promote religious tourism in Zimbabwe

In order to shore up religious tourism in Zimbabwe, the government has come up with a number of policy interventions as follows:

1. Designation of Religious Sites as Tourism Attractions

    According to the Tourism Act of 1996, the Minister of Tourism designates tourist attractions and using this legal instrument, the Minister has designated ZCC Mbungo Church in Masvingo and Celebration Centre as religious tourism shrines in recognition of the ability of these shrines to attract tourists locally and beyond.

    This has helped the church premises to be used as conference facilities when worshiping is not in session and in doing so they pay taxes to government. The churches have also invested in restaurants to serve congregants and other visitors alike. At the ZCC Mbungo church in Gokwe, construction of chalets is in progress as a build up to this designation.

2. Licensing accommodation units for religious tourists

Local churches attracting foreign tourists such as the PHD Ministries led by Prophet Walter Magaya have provided special accommodation for the regional and international visitors and also for some locals intending to spend time in prayer and solitude during deliverance periods. The Ministry through its parastatal the Zimbabwe Tourism Authority has licensed these guesthouses as formal tourist's accommodation to help improve standards.

3. Supporting religious conventions

In addition, the ministry has supported religious conventions through the Tourism Conventions Bureau, mindful that such gatherings attract huge foreigners into the country. One such convention is the Jehovah's witness convention held in 2014 which drew 89,000 worshipers of which a total of 5,500 among them were international delegates. According to ZTA (2014), of the international delegates 2,000 were from the United States of America, 2,000 from African countries while the remaining 1,500 were drawn from other European Countries namely Austria, Switzerland, Norway, the United Kingdom and Brazil. Worth noting is that most of these tourists were from the United States which is the second highest global spender with an average of USD 1,108 per person per trip.

Conclusions

While religious-based tourism is an ancient phenomenon, it has not yet received considerable attention in Zimbabwe. However, it has substantially contributed to the local economy by stimulating both international and domestic tourism. This realization calls for concerted efforts by government and the private players on how this sector can be further developed to enhance its contribution to the local economy and use it as a tool for peace enhancement and national development.

Case study Angola:

Developing skills in the Angolan public tourism sector

ipdt institute of tourism

Context

The positive role played by tourism in the economy of a country is felt quickly, bringing numerous benefits to macroeconomic and social levels. In Angola, there is a growing awareness of the importance of tourism as support for the development of the country and the community. This has been intensified from 1996 onwards with the creation of the Ministry of Hospitality and Tourism (MINHOTUR). However, with the civil war, between 1975-1988, more than 90% of hotels and similar units in the country were abandoned by their former owners.

Since 2002, with the achievement of peace, the country's tourism sector has experienced significant development with several key programmes for the sector being approved. Of these, the Angolan Tourism Master Plan (TMP), which lead to the creation of three poles of tourism development (Calandula, Cabo Ledo and Okavango Basin), deserve a special emphasis.

The Tourism Master Plan of Angola (TMP) is a strategic document produced with the objective of instructing the development of the tourism in the country, defining areas of special intervention by 2020 as well as strategic goals for the sector.

As a result of the proposals and recommendations of the TMP, Angola is focusing on creating the necessary tools for the organization and development of the sector. One

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of the particular areas for action is that of development and training of human capital, both of public and private entities and organizations acting in the tourism sector. In this context, MINHOTUR decided to launch a unique training programme to assist senior public managers and officials in implementing the Tourism Master Plan.

With the technical support of IPDT – Institute of Tourism, an Affiliate Member of UNWTO, specialized in consultancy and training in the tourism and hospitality sectors, the *Tourism Executive Master* (TEM), a tailor made master programme was developed.

The programme

Taking into account the vital role that tourism plays in the economic and social development of Angola, the programme was designed with the aim to fit the needs of the various destinations under construction, thus providing technical and managerial tools that could help national, departmental and tourism pole directors manage and making decisions in perfect alignment with the key strategic lines put forward in the Angolan Tourism Master Plan.

The TEM programme lasted for eight months, spread over seven thematic seminars, with each seminar having a face-to-face and a distance learning phase. To be granted the TEM diploma, participants had to develop an Applied Final Project.

Given the specificity of the programme, the distance-learning phase was crucial, allowing for lower costs, flexibility and maximization of the learning process. For this purpose, an online project management platform was developed, where new approaches to problems were discussed, in order to enable the creation of innovative solutions, capable of immediate application in the tourism sector's context.

Seminars and methodological approach

The programme was composed of the following seminars: Case Studies in Tourism, Management Skills in Tourism, Tourism Strategy, Economic and Financial Analysis and Investment Projects, Tourism Marketing, Tourism Management Simulation and Applied Final Project. In respect to methodology, the seminars were run as workshops, with the student's participation in the discussions being highly stimulated, mainly in terms of problem solving and case studies analysis. The programme also required work field (research) in complementarity with the teaching activity in class.

Figure 5.4   Some of the graphic supports developed for the project

TEM's approach followed these dimensions:

Figure 5.5 TEM dimensions

1 **Methodology:**
   – Case studies; and
   – Creation and use of national cases.

2 **Web support:**
   – Dedicated website; and
   – Students backoffice: ipdtidealab.

3 **Tutors:**
   – Internationally renowned experts; and
   – Tourism specialists.

4 **Comunication:**
   – National comunication plan, with visibility
     and international support: UNWTO, WHATT Project.

5 **Opportunities:**
   – Skills acquisition;
   – Knowledge of international best practices; and
   – Experience sharing.

6 **Sponsors:**
   – MINHOTUR; and
   – Bank Caixa-Totta.

7 **Causes:**
   – Culture;
   – Environment; and
   – Comunity – social reintegration (by areas and segments).

The programme teaching methodology was based on IPDT's international experience in tourism and hospitality post-graduate training and education, blending face-to-face with distance learning tools. For TEM Angola, the following approach was followed:

Figure 5.6 TEM teaching methodology
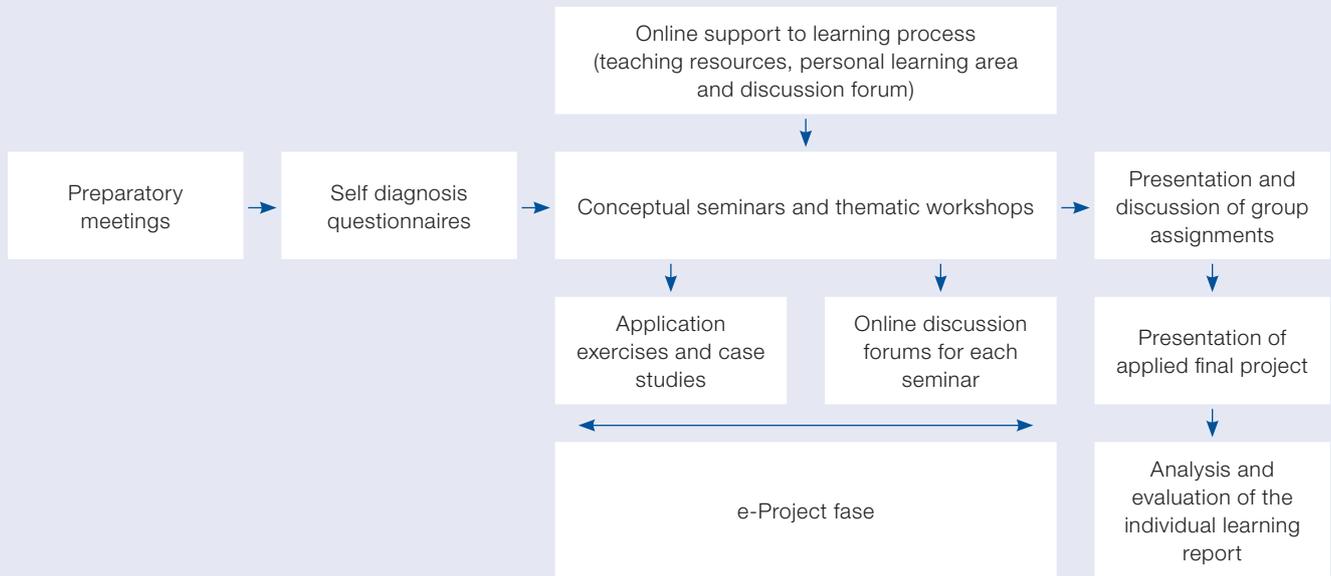
Outcomes

The programme was very successful, both in terms of student participation and partners' involvement. Student intake was 33 senior tourism officials (national, departmental and tourism pole directors), and the programme had the participation and support of MINHOTUR, Caixa-Totta Bank and AddWise Consultancy Company, a local partner of the project.

All 33 participants successfully completed the programme and were awarded the diploma of *Tourism Executive Master.*

The programme deliveries and personal applied projects were presented at a public closing ceremony, held at the Epic Sana Hotel and Spa Luanda. The event had the presence of several entities of the Angolan government and the tourism sector, and was presided by the Minister of Hospitality Tourism of Angola, Dr. Pedro Mutinde, and the UNWTO representative, Dr. Márcio Favila.

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