



THE WORLD BANK



NEW YORK UNIVERSITY

Africa House



# The State of Tourism in Africa

A joint publication of Africa House at New York University (NYU), the Africa Travel Association (ATA) and the World Bank (WB)

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## AFRICA TOURISM FACTS

- ▶ Africa's tourism arrivals grew from 37 million in 2003 to 63 million in 2010
- ▶ International tourism receipts in Africa totaled US \$44 billion in 2010
- ▶ In 2010 Morocco, Angola, Cape Verde, Madagascar, South Africa and Egypt all reported double-digit growth in arrivals. Tanzania, and Mauritius also showed strong growth rates in 2010
- ▶ Preliminary figures for the first four months of 2011 show strong growth in arrivals for Cape Verde, Kenya, Madagascar and Senegal
- ▶ Direct travel and tourism employment in Africa totaled an estimated 7.7 million in 2010

**SOURCES:** United Nations World Tourism Organization (UNWTO) and The World Travel and Tourism Council (WTTC)

## The Continuing Case for Tourism—Especially in Extraordinary Times

**T**his second issue of *The State of Tourism in Africa* continues to tell the story of how tourism not only drives economic growth and development, but also contributes to economic recovery. More and more tourism is showing its resilience in ordinary and extraordinary times.

In early 2011, tourism in North Africa suffered from the shocks of political change. A number of countries issued travel warnings for North Africa; tour operators rerouted their customers and cancelled prebooked trips. In 2010, Egypt had received 14 million visitors. Tourism was also the second largest revenue source for the country, generating US\$12.5 billion in 2010. Yet, in January 2011, occupancy levels in hotels in major tourism areas dropped to single digits, leaving small tourism entrepreneurs with little to no income. Approximately 210,000 tourists had left the country in the last week of January, costing the country US\$178 million, according to Egypt's statistics bureau.

By April 2011, with some travel bans lifted, tourists began to return to Egypt, although, occupancy rates remained low. Egypt's gov-

ernment was eager to get tourism back. Mounir Fakhry Abdel Nour, the country's new Minister of Tourism, launched a variety of innovative marketing strategies. While it will take time for Egypt's tourism sector to reach its former volume, there is a belief among many tourism stakeholders that Egypt's past popularity as a historical and cultural destination will continue to be what drives tourists to visit the "new Egypt".

There are many examples to learn from other destinations bouncing back after major setbacks. After the World Trade Center attack on September 11, 2001, New York City was in a state of shock, lodging occupancy levels plummeted and air travel was limited. Domestic and foreign visitors to New York City dropped to 35.2 million in 2001 and remained at a similar level of 35.3 million in 2002. However, 2003 recorded a new record high with 37.8 million arrivals. This experience provides a valuable example of tourism resiliency for destinations affected by extraordinary events.

Election-related political unrest in early 2008 caused Kenya's tourism arrivals to col-

*continued on next page*



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lapse. While the unrest was localized in a few areas of the country, tourists left the country and others changed their itineraries.

Tourism arrivals dropped significantly during the first quarter of 2008 resulting in a 30% overall decline in 2008. In response, the Kenya Tourist Board (KTB) implemented their crisis management plan engaging both public and private sector stakeholders.

By 2010, Kenya recorded their highest number of international tourist arrivals ever. Tourism has proven to be one of the most resilient industries for countries that have encountered natural disasters, political unrest or other extraordinary events. This is good news during ordinary... and extraordinary...times. ■

## Africa and the Caribbean: Sharing Tourism Insights

**T**here are lessons from the Caribbean experience for Africa's tourism development. The two regions share many similarities, including colonial experiences and the variety of languages, such as English, French, Dutch, and Spanish. The Caribbean, of course, also has strong African roots. The arts, music and cuisine have become known as "Afro-Caribbean," an important asset of the region's tourism.

There are also many differences. In 2010, tourist arrivals in Caribbean destinations totaled 23.1 million in comparison to 63 million in Africa. A large portion

of tourist arrivals to the Caribbean are from cruises. In 2010, Caribbean destinations received a total of 43.6 million visitors, of which 20.5 million were cruise passenger visits. In contrast, with the exception of North Africa, and smaller cruises along the East African coast and to Southern Africa, cruise passenger visits are not significant in the African continent.

Sharing tourism development strategies and experiences is an important link for Africa and the Caribbean. A memorandum of understanding signed July 26, 2010, between the Africa Travel Association (ATA) and the Carib-

bean Tourism Organization (CTO), the principal organization supporting the socio-economic development and promotion of tourism to the Caribbean (CTO), aims to explore areas of collaboration and joint learning of experiences. Hugh Riley, Secretary General & CEO of the Caribbean Tourism Organization, notes, "Together, both organizations can explore the tourism potential that naturally links Africa and the Caribbean as a result of the historical, cultural and familial ties." ■

**SOURCE:** *The Caribbean Tourism Organization (CTO), September 2011.*

## Harnessing the Power of Social Media

**T**he internet and social media have changed the way businesses and destinations market themselves, their products and their services in today's marketplace, particularly in the U.S.A. Recent research from the U.S. Department of Commerce identified a 15%

increase in the number of Americans sourcing their travel to Africa through the internet. Findings from the second annual Travel Trust Index Report that examines Americans' travel booking behaviors and preferences, echo the U.S. Department of Commerce research highlighting:

- 78 percent of Americans use the web to make travel decisions.
- 68 percent trust the web for travel related advice.
- Only 5 percent say travel agencies are their most trusted source for travel-related information.

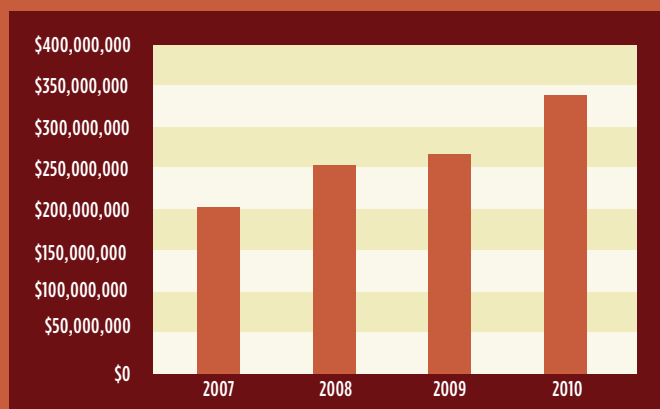
Using key "search terms" is essential to a successful market-

ing strategy, since African destinations not only compete against each other, but also better known destinations. For example "vacation destinations" is a term searched 74,000 times every month on Google. However, Africa is not among the top 20 results.

The sites, people and eco-diversity of destinations such as Egypt, Tanzania and Zimbabwe can compete with other global destinations. A vineyard tour in South Africa can also compete with vineyards in Rhone or Bordeaux. Getting the message out begins with placing Africa front and center in consumers' minds, especially those with a predisposition toward a specific destination's products and services, such as luxury travel, culinary tourism or volunteering. Leveraging search engines, the Internet and social media is a way to achieve this. ■

### Expedia in Africa (2010): \$336+ million

GROSS-BASE BOOKINGS: ALL LINES OF BUSINESS (AIR, HOTEL, PACKAGES ETC.)



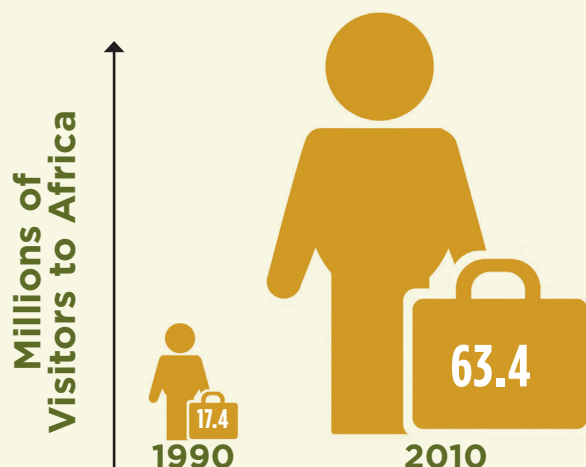
"Expedia's business to Africa keeps on growing despite the global financial downturn. The opportunity is there; the facts are here. This is no longer about the future; it is about the present."

—DIEGO LOFEUDO, Director Eastern Mediterranean & Africa, Expedia, Inc.





# AFRICA TOURISM BY THE NUMBERS



## Tourist Arrivals in Africa Continue to Grow in 2010

Worldwide arrivals in 2010 were up by 6.6% compared to 2009 and reached 940 million arrivals (UNWTO, 2011). Emerging countries are driving much of the boost as the growth rate of tourist arrivals is exceeding that of developed countries. Emerging economies are also leading the recovery in terms of increased expenditures abroad.

In 2009, Africa was the only region to show growth in tourism arrivals. Figures from the UNWTO for 2010 show a continued growth trend as the region shows an 8.8% increase in arrivals. Africa received 63 million tourists in 2010. The 2010 FIFA World Cup proved very successful as South Africa's arrivals increased by 15% in that year with more than 309,000 visitors arriving to attend the sporting events.

## Tourist Arrivals and Receipts in Africa by Region (2009)

REGION	TOTAL TOURIST ARRIVALS	TOTAL LONG HAULS	RECEIPTS US\$ M
NORTH AFRICA	29,690,794	28,427,896	21,760
SOUTHERN AFRICA	10,626,127	2,509,893	8,599
EAST AFRICA	11,905,651	3,944,858	6,332
WEST AFRICA	4,419,061	1,748,555	2,676
CENTRAL AFRICA	1,075,408	654,168	631
TOTAL	57,717,041	37,285,370	39,998

SOURCE: UNWTO; Long-haul tourist arrivals are defined as all tourists from outside of the SSA region (total tourist arrivals minus total Africa arrivals)

## Top Five Africa Countries for International Tourist Receipts (US\$ M)

COUNTRY	2008	2009	2010
EGYPT	10,958	10,755	12,528
SOUTH AFRICA	7,925	7,543	9,070
MOROCCO	7,168	6,557	6,720
TUNISIA	2,953	2,773	2,654
TANZANIA	1,289	1,160	1,303
MAURITIUS	1,449	1,117	1,282

SOURCE: UNWTO TOURISM BAROMETER JUNE 2011

## International Tourist Arrivals (2010)

(SUB) REGION	MILLIONS
EUROPE	476.6
ASIA AND THE PACIFIC	203.9
NORTH AMERICA	98.2
CARIBBEAN	20.1
CENTRAL AMERICA	7.9
SOUTH AMERICA	23.5
AFRICA	63.4
MIDDLE EAST	46.3
WORLD	940

SOURCE: UNWTO TOURISM BAROMETER JUNE 2011

## Tourism Employment as a % of Total Employment (2010)

COUNTRY	% OF TOTAL EMPLOYMENT	DIRECT EMPLOYMENT
1. SEYCHELLES	22.1	8,600
2. MAURITIUS	12.7	70,300
3. CAPE VERDE	12.6	14,400
4. TUNISIA	7.7	247,800
5. MOROCCO	7.6	862,400

SOURCE: WTTC

## Direct Employment in the Tourism Industry as % of Total Employment

WORLD AVERAGE	3.3%
AFRICA	3.1%
NORTH AFRICA	6.2%
SSA	2.3%

SOURCE: WTTC

# Tour Operators: A Critical Connector Between Source Markets and Africa

**T**our operators are key components of the tourism industry in Africa. The tour operations sector acts as the “connector” in the tourism business. International operators connect with potential customers and airline reservation systems; ground operators connect with accommodation and domestic transport providers. Recent research on Sub Saharan Africa (SSA) tour operators conducted for the World Bank highlights useful findings and trends for tourism stakeholders.

The tour operations sector is complex and its numerous inter-related parts have to perform to a high standard in order to deliver a quality experience. The growth of the sector also relies on many external factors such as security and political stability, health, air transport frequency and prices, infrastructure, and the overall business environment.

The results of an on-line World Bank survey and interview of tour operators highlighted key challenges to the tour operator sector: high prices, security, access, business environment, service standards and market image. Of these, high prices compared to other regions were identified as the main constraint faced by international operators selling tours to SSA.

A benchmarking study found that tours to SSA were 25% to 35% more expensive than equivalent tours to other parts of the world.

The high price of tours has more effect on the middle and low end of the market than the high-end of the market.

Tour operators explained that high-end travelers are selecting an Africa destination for the big game viewing and exclusivity, not for the price. Fortunately African tour products are not easily inter-changeable with destinations in Asia or elsewhere in the world. Tigers in India are not as numerous as lions in Kenya. Sub Saharan Africa has the competitive edge in wildlife tourism. Africa has “trophy value” for American travelers, “adventure” value for British travelers, and “exploration” value for the French. To maintain these market segments and to take full

advantage of this competitive edge, improvements to service standards and to ground operator professionalism are crucial. This will help convey the feeling of value for money to customers who are paying top dollar for their SSA experience. Careful environmental stewardship is also crucial to the sustainability of these products.

## Around 4 million tourists took a “tour” to Sub Saharan Africa in 2009.

High prices have a much bigger impact on the middle and lower-end of the market. Although ground operators expressed mixed feelings about the long term effects of charter tourism for destinations, there are significant opportunities for tour operators to expand their appeal to the middle section of the market: young couples, groups of friends, students, “voluntourists”, and families with slightly older children. If the price is right, market awareness is improved, and visitors consistently receive value for money, these groups could just as well decide on a vacation in Mozambique, Ethiopia, Ghana, or Madagascar rather than a tour to India or Thailand. Improved business environment, investment in mid-range accommodation, increased liberalization of air transport, and more effective marketing will help improve competitiveness and access to this high potential middle market.

Sub Saharan Africa has huge potential for sustainable tourism development. Tour operators can take visitors to places where independent travel is not a viable option. They also facilitate soft adventure options to places which would otherwise have few economic opportunities. Attention to quality, service, environmental management and logistics will help countries to grow this important sector further over the next decade. ■

## Main Findings of Research

### Sector Size

Current best estimates suggest there are between 2,500 and 3,000 ground operators in SSA. Destinations offering more complex products such as safari and adventure have a larger number of ground operators. The countries with the most tour operators are South Africa, Kenya, Tanzania, Ethiopia, and Madagascar.

### Employment

Tour operators are estimated to provide direct employment for 30,000 to 45,000 people in SSA. Employment includes: drivers, guides, porters, mechanics, naturalists, reservation agents, accountants, and managers.

### Spending

Tour operators are responsible for 10% to 15% of tourist spending in SSA. This is equivalent to between US\$2 billion to US\$3 billion. Due to their tendency to lead visitors to isolated, rural locations, tour operations can have a significant pro-poor economic impact.

### Tour Products

Tour operators report that the largest and fastest growing tour product to SSA is customized tours. These tours are tailor-made to fit the budget, destination preferences, and timeframe of individuals or small family groups. The main attraction of a customized tour to Africa is to combine wildlife with one or more other activities such as beach or culture, at a budget and activity level that suits the client.

### Challenges

Cost, security, access, business environment, service standards, and market image

*Source: World Bank*





# ATA World Congress Highlights: Impact, Trends and Best Practices



**T**he Africa Travel Association held its 36th Annual World Congress from May 25-29, 2011 in Senegal, bringing more than 200 industry professionals and government leaders together to shape the future of Africa's growing tourism industry. Discussion highlights included:

*"African airlines, like South African Airways and Arik Air, understand the African market... When customers fly with African airlines, revenue and jobs remain on the continent and are injected into the economy. We're also best positioned to engage in public-private partnerships, to encourage the improvement of infrastructure and inter-country travel on the continent, as well as to promote travel and tourism."*

—GREGG TRUMAN, Vice President, Marketing, South African Airways

## Tourism Drives Economic Growth and Changes Lives

Tourism provides significant potential and opportunity for socio-economic growth and development.

*"The tourism industry contributes significantly to strengthening the conditions of our economic development by creating more wealth and helping us achieve the [United Nations] Millennium Development Goals."*

—HON. SOULEYMAINE NDÉNÉ NDIAYE,  
Prime Minister, Senegal

## Destinations and Businesses Derive Value from the Internet and Social Media

*"The best money spent in travel advertising is on the Internet and in generating user-content on products with social media tools, like YouTube, Twitter, Facebook, blogs, and sites like Trip Advisor."*

—JORGE EDUARDO CASTILLO,  
Passport Health, USA

## New Product Development and Diversification Attracts New Markets

The competitiveness of a country's tourism industry depends on the diversity of existing and potential tourism products and services. Culinary tourism stands as an emerging new product that provides Senegal and Africa with opportunities for brand re-positioning.

*"As consumers become more adventurous, and with the increased demand for healthy ingredients, and the rise of the slow food and farm-to-table movements, Africa is that 'last frontier' for foodies."*

—PIERRE THIAM, Chef and  
Cookbook Author

**SOURCES:** Highlights prepared by Leigh Rome and Rebecca Asch, recipients of the new NYU-Gallatin and NYU Africa House Research Fellowship and Travel Grant in May 2011.



## Focus on Senegal

Senegal is taking steps to brand itself as a "Gateway to Africa," highlighting new industry events and travel products, most notably The International Tourism, Cultural Industries and Artistic Crafts Fair (TICAA) and the new culture and heritage site, the Africa Renaissance Monument. This giant copper sculpture of a family reaching skyward was inaugurated by President Abdoulaye Wade to mark the 50th anniversary of the country's independence in April 2010. At the end of the ATA congress, delegates, alongside thousands of fans, attended a Senegalese wrestling match at Demba Diop Stadium in Dakar. Today, wrestling is Senegal's national sport and a multi-million dollar industry that attracts more fans than any other sport in the country.

# Tourism Enhances Africa's Competitiveness

**T**he *Africa Competitiveness Report 2011* is a joint publication of the World Economic Forum (WEF), the African Development Bank and the World Bank. The report contains in-depth assessments of the state of competitiveness, the impact of foreign direct investment on the continent, and the trade performance of the region. The 2011 Report focuses on harnessing Africa's underutilized resources: skills, female entrepreneurship, and natural and cultural resources and, for the first time, includes tourism as an area on which Africa should focus to ensure strong sustained and shared growth.

The tourism chapter of the report, "Assessing Africa's Travel & Tourism Competitiveness in the Wake of the Global Economic Crisis" co-written by the World Bank and WEF, brings together data from the World Economic Forum's Travel & Tourism Competitiveness Index (TTCI) and World Bank research on the drivers of Africa's travel and tourism (T&T) competitiveness. The chapter analyzes T&T competitiveness in Africa while comparing it to four rapidly developing BRIC countries—Brazil, Russia, India, and China through review of the TTCI's 14 variables reflecting tourism competitiveness.

Global TTCI rankings of 139 countries based on 2010 data place Tunisia at 47th position, followed closely by Mauritius at 53rd. In com-

## Reaping the Full Benefits of Tourism

"Africa's rich natural and cultural resources represent a major unexploited endowment through travel and tourism, with the potential to generate significant employment, growth and poverty reduction. The region has many advantages on which to build its tourism industry, including price competitiveness, a strong affinity for tourism and rich natural resources supported by efforts towards environmental sustainability. However, a number of obstacles remain to develop the sector, notably improving safety and security, upgrading health and hygiene levels, developing infrastructure and access to African sites, and fostering the region's human capital. Improvements in these areas would greatly enhance Africa's ability to reap the enormous potential benefits of tourism."

SOURCE: "New Report Finds Education, Women's Entrepreneurship, Tourism and Trade Key to Africa's Competitiveness," WEF, May 4, 2011.



parison, China and Brazil out performed these top African destinations. South Africa is the only other African country featured in the top half of the overall rankings and is outperformed by Russia, but ahead of India. Egypt, Morocco, and Namibia are below India's average but ahead of the overall North African average and well ahead in terms of performance than most Sub Saharan African countries. Three other African countries place within the top 100 of the global rankings: Cape

Verde, Botswana, and The Gambia.

The report explores the strengths Africa has to build upon including price competitiveness, a strong affinity for tourism, and rich natural resources supported by environmental sustainability efforts. The Report however, also shows that there are a number of obstacles hindering the region's tourism competitiveness such as safety and security, health and hygiene levels, underdeveloped infrastructure, and need for human capital across the continent. Cases on pressing issues pertinent to the industry in Africa including visa schemes, community-based tourism, tour operations, air transport, tapping natural resources to benefit the poor, and leveraging Africa's cultural heritage assets highlight opportunities for the region.

To fully tap this potential, Africa can expand by growing its offerings in combination with capturing a higher percentage of global market share. Given Africa's many strengths, improvements in these areas will greatly enhance its ability to reap the enormous potential benefits of tourism. ■

SOURCE: The Africa Competitiveness Report 2011, *World Economic Forum, the World Bank and the African Development Bank*. The complete Report is downloadable from [www.worldbank.org/africa/acr](http://www.worldbank.org/africa/acr).

### Travel and Tourism Competitiveness Index

SUBINDEX A T&T Regulatory Framework	SUBINDEX B T&T Business Environment and Infrastructure	SUBINDEX C T&T Human, Cultural, and Natural Resources
Policy Rules and Regulations	Air Transport: Infrastructure	Human Resources
Environmental Sustainability	Ground Transport Infrastructure	Affinity for Travel and Tourism
Safety and Security	Tourism Infrastructure	Natural Resources
Health and Hygiene	ICT Infrastructure	Cultural Resources
Prioritization of Travel & Tourism	Price Competitiveness in the T&T Industry	Climate Change

SOURCE: World Economic Forum, 2011

Note: This figure shows a notional 15th pillar on climate change, depicted with a dotted line. Although this concept is not yet included in the calculation of the TTCI, given its importance to the future of the T&T sector, the World Economic Forum intends to integrate the climate change pillar into that Index in the future as relevant data become available.





*Tourism offers perhaps some of the best opportunities for*

*diversifying Africa's economies, away from over-reliance on natural resources and creating millions of jobs, which we strongly advocate in our new Africa Strategy: "Africa's Future and the World Bank's Support to it". For tourism to deliver on its promise though, Africa must embrace the reforms needed to improve governance of the sector, including to help deepen competition — among countries and across tourism operators — but also to ensure that tourism creates jobs not only in towns - where an increasing number of Africa's poor live — but also in rural areas, where revenue, jobs and improved living standards stemming from tourism could help conserve Africa's rich fauna, biodiversity and rainforests among other resources.*

**—OBIAGELI  
EZEKWESILI,**  
Vice President for the  
World Bank's Africa  
Region

## China-Africa Travel & Tourism

**T**he long-term prospect of Africa-Asia travel remains bright as the rapidly growing African and Asian economies are expected to create added demand for travel between the two continents.

### Chinese Outbound Travel to Africa

China has developed into one of the most important source markets for international tourism. In 2010, 57.4 million Mainland Chinese citizens crossed a border, an increase of 20% compared to 2009. Over 140 countries worldwide have signed Approved Destination Status (ADS) agreements with the Chinese Government and are prepared to receive groups of Chinese tourists. Twenty-six of these approved destinations are African countries.

Africa received 730,000 visitors from China in 2010, making it the smallest, but fastest growing continental destination with an impressive growth rate of 90% compared to 2009. In line with the overall trend of the emerging Chinese outbound tourism market, about 75% of the Chinese visitors to Africa are first-time visitors, traveling both for leisure and for business purposes.

The top three countries for Chinese tourist arrivals in Africa are Egypt, South Africa and Kenya. In 2008, the number of Chinese travelers to these three countries accounted for 61.6% of the total arrivals to Africa. Other top 10 Africa destinations organized

by the travel agencies in China are: Morocco, Namibia, Mauritius, Zimbabwe, Seychelles, the United Republic of Tanzania and Ethiopia.

Given the deepening economic relations between Africa and China and the growing interest of Chinese leisure travelers in "exotic" destinations, the number of Chinese visitors to Africa is bound to grow further. This growth will be even more impactful if the African tourism industry is organized to prepare for these tourists by:

- Reinforcing the promotion and marketing strategies for African Destinations entrusting Chinese public relations or consulting companies.
- Offering suitable products and related services to cater for the travel habits of Chinese and their demands.
- Enhancing cooperation with the Chinese outbound tour operator.
- Establishing representative offices in China and attending outbound tourism fairs in China.

### African's Outbound Travel to China

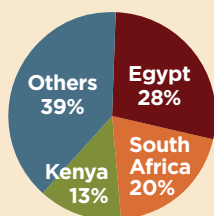
Approximately 1.9 million travelers from Africa visited Asia Pacific destinations in 2010, up 8% from 2009. This increase is however still short of the two million mark seen in the pre-economic recession period of 2007. The cumulative growth of arrival between 2005 and 2010 reached between 4% and 5% which is an encouraging result given the challenges of the economic crisis of 2008 and 2009.

The continued rise of African carriers in the past decade has been crucial in driving Africa-Asia Pacific travel by providing more direct links between the continents and thereby boosting the numbers of arrivals from Africa to Asia Pacific, and vice-versa. ■

**SOURCES:** Relevant NTOs/NSAs, compiled by PATA; Professor Dr. Wolfgang Georg Arlt, Director, COTRI China Outbound Tourism Research Institute ([www.china-outbound.com](http://www.china-outbound.com)).

**NOTE:** Asia Pacific by PATA definition, in addition to Asia and the Pacific, also include North America (Canada, Mexico and U.S.A.).

### Chinese Tourist Arrivals to Africa



Source: Study on Chinese Outbound Travel to Africa, UNWTO, 2010

### Top 5 African Source Markets to Asia (2009)

1. **SOUTH AFRICA**  
(489,416)
2. **NIGERIA**  
(161,173)
3. **EGYPT**  
(157,059)
4. **MAURITIUS**  
(80,599)
5. **KENYA**  
(63,453)

Source: China Tourism Academy, COTRI

## Leadership Voices



*"It is an indisputable fact that tourism, whose contribution to GDP is substantial and integral to economic growth, plays a key role in the economy of many Africa nations today.*

*This phenomenon has a direct positive impact on our economies and, by extension, on the lives of the people of the continent, particularly those in lower income brackets such as youth. Thus, tourism contributes significantly to GDP and is an important variable in the fight against poverty and in the creation of jobs, as well as in the generation of wealth that benefits our communities in diverse ways."*

—**HONORABLE FATOU MAS JOBE-NJIE**,  
President Africa Travel Association,  
Minister of Tourism and  
Culture The Gambia



*"Tourism in Africa is a leading industry that continues to make significant contribution to the socio-economic well-being of countries and, most notably, of individual Africans. It*

*is a sector that provides enormous economic opportunities to diverse segments of the society; from single persons and communities living around tourist attractions to well-established tourism businesses covering tour operations, travel agencies, hotels, etc. It is, therefore, my strong view that tourism should be accorded high priority in the strategic development plans of African countries. By impacting positively at both micro and macro-economic levels, it is indeed, a quick-win solution to growth and poverty eradication in the continent."*

—**DR. ELHAM M.A. IBRAHIM**,  
Commissioner for Infrastructure and  
Energy, African Union Commission

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### NYU Africa House

3 Washington Square Village, Suite 1F  
New York, NY 10012 U.S.A.  
Tel: +1 212 998 2319  
africa.house@nyu.edu

### Contributors

Martine Bakker (World Bank)  
Edward Bergman (ATA)  
Eneida Fernandes (World Bank)  
Alice Jong (ATA Intern-NYU)  
Dr. Hannah Messerli (World Bank)  
Dr. Yaw Nyarko (Africa House-NYU)  
Sharon Roling (ATA)  
Dr. Louise Twining-Ward (World Bank)

### About NYU Africa House

The Africa House at New York University is an interdisciplinary institute devoted to the study of contemporary Africa, focusing on economic, political and social issues on the continent, as well as on programs in the arts and particularly contemporary African art. [www.nyu.edu/africahouse](http://www.nyu.edu/africahouse)

### About the Africa Travel Association

The Africa Travel Association (ATA) is the leading global trade association promoting travel and tourism to Africa and strengthening intra-Africa partnerships. Established in 1975, ATA serves both the public and private sectors of the international travel and tourism industry. ATA membership comprises African governments, their tourism ministers, tourism bureaus and boards, air-

lines, cruise lines, hotels, resorts, front-line travel sellers and providers, tour operators and travel agents, and affiliate industries. ATA partners with the African Union Commission (AU) to promote the sustainable development of tourism to and across Africa. ATA's annual events bring together industry and leaders to shape Africa's tourism agenda. [www.africatravelassociation.org](http://www.africatravelassociation.org)

### About The World Bank, Africa Finance & Private Sector Development

The World Bank's Africa Finance and Private Sector Development Department (AFTFP) focuses on work with African governments to promote access to finance and to create an enabling environment for private sector development. AFTFP provides technical assistance and execute lending and operational projects in Tourism, Investment Climate, Industry Competitiveness, Financial Sector Development, and Public Private Partnerships. Established in 1944, the World Bank provides interest-free credits and grants and low-interest loans to developing countries to support poverty alleviation through investments in education, health, public administration, infrastructure, financial and private sector development, agriculture and environmental and natural resource management. [www.worldbank.org](http://www.worldbank.org)

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Data from a variety of sources such as the World Travel and Tourism Council (WTTTC) and the World Travel Organization (UNWTO) and government tourism authorities related to travel and tourism in Africa are included in this report to illustrate the interconnectedness of the industry. However, the sources speak on behalf of themselves and any questions related to data for this report, should be directed to the original sources. The findings, interpretations, and conclusions expressed herein are those of the author(s) and do not necessarily reflect the views of the Africa House-NYU, the Africa Travel Association (ATA) or the Executive Directors of the International Bank for Reconstruction and Development/The World Bank or the governments they represent.

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