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ACKNOWLEDGMENTS

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Foreword

The African Development Bank Group (AfDB) is delighted to present this edition of the Africa Tourism Monitor, which highlights the importance of developing a sustainable and resilient tourism industry through innovation, entrepreneurship, and technology. Tourism is one of the fastest-growing and most interconnected sectors in the global economy with vast potential to boost GDP and investment, spur regional integration, create employment and reduce poverty.

This volume focuses on the latest data relating to 2015, which globally saw the highest level of tourism arrivals to date. In 2015 there were 1.186 billion international arrivals – a 4.6% increase over the previous year. Worldwide, the travel and tourism industry creates 107.8 million jobs through direct employment and a total of 283.6 million jobs through direct, indirect, and induced employment – that is one in 11 jobs.

Yet in 2015, Africa’s tourism sector faced numerous challenges that led to a fall in tourist arrivals and receipts. In that year, Africa international tourist arrivals decreased to 62.5 million from 64.8 million in 2014 – a drop of 3.5%. Africa’s international tourism receipts also fell to US$ 39.2 billion from US$ 43.3 billion during the same period. A more positive outcome was witnessed in the employment sector for Africa, which grew in line with global trends. Direct travel and tourism employment in Africa in 2015 totaled 9.1 million, rising to 21.9 million jobs if we include direct, indirect, and induced employment.

In light of the tourism decline in Africa in 2015, it is now more important than ever to draw on the collaboration and expertise of public and private sector practitioners to foster a resilient travel and tourism sector. In this respect, it is heartening that the United Nations General Assembly has declared 2017 the International Year of Sustainable Tourism for Development. With this renewed global focus on sustainable tourism, now is the time for all African countries to craft economic and trade policies that will foster inclusive and green tourism growth, intra-Africa trade, and contribute to visa openness for a borderless and interconnected continent. As this edition of the Africa Tourism Monitor highlights, innovation, entrepreneurship, and technology play a vital role in making these aspirations a reality.

Regional organizations such as the AfDB and the African Union Commission (AUC) have long called for greater regional integration and the free movement of persons across borders. The AUC’s Agenda 2063 proposes the creation of an African passport and an end to visa requirements for all African citizens. Specifically, Visa Openness is seen as having great potential to improve interconnectivity, boost economic growth and trade, and spur investment, bringing massive benefits for the travel and tourism industry. Visa Openness also chimes with the AfDB’s High 5s Regional Integration Agenda, which seeks to make Africa more open, prosperous, and interconnected. As the AfDB President, Akinwumi Adesina has urged, “Let us help Africans to move freely and make Africa a more open, prosperous and truly connected continent.”

In response to this imperative, the AfDB in partnership with McKinsey & Company and the World Economic Forum (WEF) Global Agenda Council on Africa, has developed The Africa Visa Openness Index, which it launched in February 2016. The
Index aims to be a tool for change, to inform and motivate policymakers to simplify visa processes and initiative reforms, thereby spurring the free movement of African people whether for business or leisure and improving competitiveness.

The first findings of the Index are presented in the *Africa Visa Openness Report 2016*, which concludes that African countries are generally more closed off to each other than open, making travel within the continent difficult. It cites data to substantiate this claim, for example, that (i) Africans need visas to travel to 55% of other African countries and (ii) that Africans can get visas on arrival in only 25% of other African countries. The index also looks at subregional performance, and highlights that 75% of countries in the top most visa-open countries are in West and East Africa.

In its steps towards realizing a more open continent, in July 2016 at the 27th Ordinary Session of the African Union (AU) Assembly of Heads of State and Government in Kigali, the AU unveiled the first electronic, biometric common passport for Africa, thereby laying the foundation for achieving pan-African connectivity and trade.

Interconnectivity though requires more than common passports and more open borders. What is equally important is investment in Africa’s infrastructure. The AfDB has for many years highlighted infrastructure development as one of its focal priorities to facilitate accessibility and trade across the continent. The Bank’s assistance has ranged from modernizing air transport systems in Morocco to supporting the Nairobi-Addis road corridor to improve access between Kenya and Ethiopia, to cite just two examples.

The AfDB also seeks, through the *Africa Tourism Monitor* in particular, to provide a forum for all stakeholders in Africa’s tourism and travel industry to come together and present new ideas and initiatives that can revolutionize the sector and make it an engine of progress for Africa’s socioeconomic transformation.

In this volume we are delighted to welcome contributions from public and private sector partners. In particular, we recognize the contributions made by more than a quarter of African countries and by world bodies such as the United Nations World Tourism Organization (UNWTO) and International Air Transport Association (IATA). We are also pleased to collaborate with some of Africa’s top private sector trailblazers.

It is our hope that this publication will highlight the catalyzing impact that travel and tourism have on sustaining economic growth and job creation, including crucially for youth, across our magnificent continent.

---

Dr. Charles Leyeka Lufumpa  
Director, Statistics Department,  
African Development Bank Group
KEY TOURISM FACTS 2015

• Africa international tourism arrivals fell to **62.5 million** in 2015 - a 3.5% decrease from 2014.

• International tourism receipts in Africa totaled **US$ 39.2 billion** in 2015 - a decrease of 9.5% from 2014.

• Destinations with the strongest growth in international arrivals compared to 2014 were Zimbabwe (+177,000), Mauritius (+112,000), Ghana (+109,000), Sudan (+57,000), and Seychelles (+43,000).

• Morocco surpassed **10 million arrivals** for the 3rd consecutive year.

• Africa in 2015 held a **5.3%** share in worldwide tourism arrivals, and a **3.1%** share of worldwide tourism receipts, which represent a 0.4% and 0.2% decrease from the previous year.

• Direct travel and tourism employment in Africa rose to **9.1 million** (a 4.6% increase from 2014), with 2.4 million jobs in North Africa and 6.7 million jobs in Sub-Saharan Africa.


**Based on available data, November 2016.

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Preface

Welcome to the 2016 edition of the *Africa Tourism Monitor*. The theme of this issue is “Sustainable Tourism through Innovation, Entrepreneurship, and Technology,” where we examine a range of timely topics. These include implementing policies to drive intra-Africa trade and tourism, creating a borderless Africa, tracking wildlife through the latest technology, mobile apps for travel, building resilience to climate change, enhancing connectivity, increasing universal accessibility, developing eCommerce tools, drawing inspiration from African art, exploring the possibilities of medical and wellness tourism, and much more.

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

We would like to thank all of our dedicated partners from Government and the private sector who contributed their data, knowledge, and insights to produce this publication. We especially thank the Africa Travel Association (ATA), whose members have contributed many articles, as well as New York University. Through collaborations such as these we can explore ways in which innovation, entrepreneurship, and technology will boost sustainable socio-economic growth on the continent to its fullest potential.

**Yaw Nyarko**
Professor of Economics,
Director of New York University Africa House

**Andrea Papitto**
MSc Tourism Management, Africa Tourism Development Consultant
Africa Tourism: The Numbers

2015 was another robust year for international tourism generally. With 1.186 billion international arrivals, a 4.6% increase over 2014, worldwide tourism activity surged to its highest level to date. By contrast, tourism arrivals and receipts on the African continent registered a decline from the previous year. In 2015, Africa tourist arrivals decreased to 62.5 million, down from 64.8 million in 2014. Africa’s market share in 2015 also fell to 5.3% of worldwide tourism arrivals and a 3.1% share of worldwide tourism receipts, down from 5.7% and 3.3% respectively in 2014. Consequently, Africa’s international tourism receipts also declined to US$ 39.2 billion in 2015 from US$ 43.3 billion the previous year – a marked fall of 9.5%.

This was a disappointing performance for the tourism sector, especially after years of increased growth. The reasons for this decline may be due to the confluence of a number of events: increased competitiveness from emerging global tourist destinations; political instability in some North African countries; threats of terrorism; lingering stigma from the Ebola epidemic; and depressed economic conditions in a number of Eurozone countries that have traditionally represented a strong market for Africa tourism. Outside Africa, the regions that saw a higher than average increase were the Americas (+6.0%), Asia and the Pacific (+5.6%), and Europe (+4.6%) in contrast to Africa’s 3.5% decrease.

Despite the challenges for African tourism in general, some African countries experienced exceptionally strong growth. These included (based on number of arrivals): Zimbabwe (+177,000), Mauritius (+122,000), Ghana (+99,000), Sudan (+57,000), and Seychelles (+43,000). Even factoring in a decline of 106,000 arrivals, Morocco surpassed the 10 million tourist arrivals mark for the third consecutive year. Based on tourist arrivals, Morocco, Egypt, South Africa, Tunisia, and Zimbabwe remain the five most popular African destinations. However, each of the top four countries experienced year-on-year declines, with Tunisia registering the highest decline of 25.2% from 2014 (down by 1.8 million arrivals), followed by South Africa with a 6.8% decline, and Egypt with a 5.1% decrease from 2014.

| Top Five African Countries for International Tourist Arrivals in 2015 (millions)* |
|-----------------|-------|-------|-------|-------|-------|-------|
| Morocco        | 9.29  | 9.34  | 9.38  | 10.05 | 10.28 | 10.18 |
| South Africa   | 8.07  | 8.34  | 9.19  | 9.54  | 9.55  | 8.9   |
| Tunisia        | 7.83  | 4.79  | 5.95  | 6.27  | 7.16  | 5.36  |
| Zimbabwe       | 2.24  | 2.42  | 1.79  | 1.83  | 1.88  | 2.06  |

Note: In 2014, 2013, 2012, and 2011, the 5th country in Africa ranked by the highest tourist arrivals was Algeria.

*Based on available data, November 2016.


International Tourist Arrivals (2015)*

<table>
<thead>
<tr>
<th>Region</th>
<th>Millions</th>
<th>Percentage of Global Tourist Arrivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>607.2</td>
<td>51.2%</td>
</tr>
<tr>
<td>Asia &amp; The Pacific</td>
<td>279.2</td>
<td>23.5%</td>
</tr>
<tr>
<td>North America</td>
<td>127.6</td>
<td>10.8%</td>
</tr>
<tr>
<td>Caribbean, Central America, South America</td>
<td>65.1</td>
<td>5.5%</td>
</tr>
<tr>
<td>Africa</td>
<td>62.5</td>
<td>5.3%</td>
</tr>
<tr>
<td>Middle East</td>
<td>44.2</td>
<td>3.7%</td>
</tr>
<tr>
<td>Total</td>
<td>1,185.8</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

*Based on available data, November 2016.

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

www.tourismdataforafrica.org
TOURISM’S CONTRIBUTION TO EMPLOYMENT

Even with declining tourist arrivals, the employment figure for the tourism sector in Africa was strong in 2015, in line with world market trends. Globally, the travel and tourism industry is responsible for creating 107.8 million jobs through direct employment and 283.6 million jobs if we include direct, indirect, and induced employment. That equates to one in 11 jobs originating from the travel and tourism industry.

According to the World Travel and Tourism Council (WTTC), Africa’s employment opportunities have grown in line with world growth. In 2015, direct travel and tourism employment in Africa as a whole totaled 9.1 million, comprising 2.4 million jobs in North Africa and 6.7 million jobs in Sub-Saharan Africa. This is an increase of 0.4 million jobs over the previous year. However, if we take account of jobs supporting the travel and tourism industry (including direct, indirect, and induced employment), the figure rises to 21.9 million people continent-wide.

Egypt, Ethiopia, Morocco, South Africa, Nigeria, and Kenya featured the highest direct tourism employment in 2015, ranging from 500,000 to 1.1 million jobs in each country. Similarly, the small island states of Seychelles, Cabo Verde, Mauritius, and São Tomé and Príncipe and the coastal West African state of The Gambia registered a strong performance for both direct tourism employment and direct, indirect, and induced employment.

Top 5 African Countries for Direct Tourism Employment as a % of Total Employment (2015)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>% OF TOTAL EMPLOYMENT</th>
<th>TOTAL EMPLOYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seychelles</td>
<td>26.2%</td>
<td>12,000</td>
</tr>
<tr>
<td>Cabo Verde</td>
<td>15.0%</td>
<td>33,500</td>
</tr>
<tr>
<td>Mauritius</td>
<td>11.1%</td>
<td>58,500</td>
</tr>
<tr>
<td>São Tomé and Príncipe</td>
<td>8.7%</td>
<td>8,000</td>
</tr>
<tr>
<td>The Gambia</td>
<td>6.9%</td>
<td>49,000</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC).

Top 5 African Countries for Total Tourism Employment as a % of Total Employment (2015)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>% OF TOTAL EMPLOYMENT</th>
<th>TOTAL EMPLOYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seychelles</td>
<td>61.9%</td>
<td>28,000</td>
</tr>
<tr>
<td>Cabo Verde</td>
<td>38.0%</td>
<td>86,000</td>
</tr>
<tr>
<td>Mauritius</td>
<td>24.4%</td>
<td>128,500</td>
</tr>
<tr>
<td>São Tomé and Príncipe</td>
<td>19.0%</td>
<td>17,000</td>
</tr>
<tr>
<td>The Gambia</td>
<td>17.3%</td>
<td>123,500</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC).


<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>‘000 JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>1,110.5</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>1,044.0</td>
</tr>
<tr>
<td>Morocco</td>
<td>731.5</td>
</tr>
<tr>
<td>South Africa</td>
<td>703.0</td>
</tr>
<tr>
<td>Nigeria</td>
<td>651.0</td>
</tr>
<tr>
<td>Kenya</td>
<td>592.5</td>
</tr>
<tr>
<td>Uganda</td>
<td>464.5</td>
</tr>
<tr>
<td>Tanzania</td>
<td>386.5</td>
</tr>
<tr>
<td>Algeria</td>
<td>327.5</td>
</tr>
<tr>
<td>Ghana</td>
<td>292.0</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC).


<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>‘000 JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>2,620.0</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>2,326.5</td>
</tr>
<tr>
<td>Morocco</td>
<td>1,687.5</td>
</tr>
<tr>
<td>Nigeria</td>
<td>1,628.0</td>
</tr>
<tr>
<td>Kenya</td>
<td>1,564.0</td>
</tr>
<tr>
<td>South Africa</td>
<td>1,554.0</td>
</tr>
<tr>
<td>Uganda</td>
<td>1,173.0</td>
</tr>
<tr>
<td>Tanzania</td>
<td>1,151.0</td>
</tr>
<tr>
<td>Mozambique</td>
<td>745.0</td>
</tr>
<tr>
<td>Ghana</td>
<td>716.5</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC).

Direct Employment in the Tourism Industry as a % of Total Employment (2015)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>% OF TOTAL EMPLOYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Average</td>
<td>3.6%</td>
</tr>
<tr>
<td>Africa</td>
<td>3.0%</td>
</tr>
<tr>
<td>North Africa</td>
<td>4.6%</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>2.6%</td>
</tr>
<tr>
<td>Egypt</td>
<td>4.4%</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>3.6%</td>
</tr>
<tr>
<td>Morocco</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC).
“Agenda 2063, ‘The Africa We Want,’” vision was adopted by African Heads of States and Government Summit in January 2015 in Addis Ababa, complete with its set of aspirations for the continent. It will commence with a “visit”, in the visit-trade-invest value chain, positioning Africa for a travel and tourism renaissance of epic proportions going forward into the next 50 years!”

Honorable Dr. Walter Mzembi,
Minister of Tourism and Hospitality Industry, Republic of Zimbabwe,
Chair, United Nations World Tourism Organization Regional Commission for Africa;
African Union endorsed candidate for the position of UNWTO Secretary General, 2017 Elections

“Tourism provides opportunities for entrepreneurship and creates avenues for job creation while allowing for the application of technology in maximizing its potential. My Ministry is committed and determined to use tourism, culture, and creative arts as a vital tool for achieving positive change in communities across the length and breadth of our dear nation Ghana.”

Honorable Elizabeth Ofosu-Adjare,
Minister of Tourism, Culture, and Creative Arts, Republic of Ghana

“Nowhere else in the continent of Africa can one experience a tremendous diversity within a single country like in Cameroon. In fact, diversity is Cameroon’s unique product. It makes Cameroon what it is and distinguishes it from other destinations. Diversity is Cameroon’s tourism identity. This is evidenced not only in its geography and natural resources, but also in its ethnic composition, indigenous languages, history, and extraordinary cultural heritage. Cameroon is really ‘Africa in Miniature.’ With this great potential, developing the tourism sector of Cameroon is vital because it holds, and will shape, the economic future of the country. That is why the current improvements of our tourism infrastructure must be sustained to make our destination more and more competitive.”

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

“Tourism is an international economic activity that many countries in the world depend on to anchor their GDP, and Kenya is no exception. Tourism in Kenya has received a big boost over the last year or so arising from enhanced visibility in the international arena. Kenya has been host to various international fora, among them UNCTAD and TICAD. The tourism industry in Kenya provides vast formal and informal employment through various facilities in the hospitality industry. The Ministry of Tourism in addition provides an avenue for investment in tourism by loaning entrepreneurs through the Tourism Finance Corporation, among other incentives. Technology is key in driving the tourism sector and Kenya recently addressed the ease of travel through availing an e-visas facility. This has proved useful in addition to the availability of online information on the destination through the magical kenya website and other social media channels.”

Honorable Najib Balala,
Cabinet Secretary of the Ministry of East Africa Affairs, Commerce, and Tourism, Republic of Kenya
“Tourism is an economy based on the movement of people. The challenge for all destinations is to create a motivation for people to travel and facilitate travel. Uganda is a country endowed with a rich assemblage of natural and cultural attractions and we have every reason and capacity to attract more tourists. In order to do this, we are improving our competitiveness as a destination. Competitiveness includes the state of infrastructure, transport, communication, finance, the cost of starting and managing a business, the legal environment, health, peace, and security. These factors directly affect tourism. We are mainstreaming tourism in all facets of the development agenda to catalyze the sector.”

Honorable Prof. Ephraim Kamuntu, Minister of Tourism, Wildlife, and Antiquities, Republic of Uganda

“Tourism will continue to be a major engine of employment, economic growth, and foreign earnings in Tanzania for many years to come.”

Honorable Prof. Jumanne A. Maghembe, Minister of Natural Resources and Tourism, United Republic of Tanzania

“Senegal tourism is at an important stage of development, marked by Government willingness to make it one of the levers of economic growth. Tourism policy is a vital sector in the Emerging Senegal Plan, where we have outlined several projects to boost tourism, job creation, wealth, and foreign exchange revenues for Senegal’s economy. Senegal has implemented several measures to catalyze the tourism sector, including eliminating visas and reducing airport taxes to lower the travel cost for the destination, and we have seen a resurgence in tourism with Senegal surpassing the one million tourist mark.”

Honorable Maïmouna Ndoye Seck, Minister of Tourism and Air Transport, Republic of Senegal

“Seychelles is part of the small developing island states and one that depends entirely on tourism. Our tourism industry, and the tourism industry of Africa, needs consolidation and this will be achieved when Africa works with Africa and only when Africa gets to know Africa. After the consolidation, we need to accelerate the growth of our industry and this is by embracing entrepreneurship and technology. We are a continent of capable and innovative people and we need to now open more doors for our people by claiming back our industry through encouraging Africans, in its diversity, to get more involved.”

Honorable Alain St. Ange, Minister of Tourism and Culture, Republic of Seychelles

“The Gambia remains a formidable tourism destination with a strong resolve on the part of Government to render the country as the tourism destination of choice in Sub-Saharan Africa. Our commitment is to leverage the synergy inherent in tourism, culture, and hospitality to increase the contribution of the industry to GDP from 16% to 25% by the year 2020 in line with our Vision 2020 Blueprint.”

Honorable Benjamin A. Roberts, Minister of Tourism and Culture, Republic of The Gambia
“Under the Malawi Growth and Development Strategy (MGDS), which is the overarching operational medium term strategy for achieving poverty reduction through sustained economic growth and infrastructure development and the National Export Strategy, Government identified tourism as one of the key drivers of the economy with the potential to greatly contribute to the overall objective of increasing foreign exchange earnings, creation of employment, retention of earnings from tourism, as well as increased income at the household level.

Malawi’s tourism strength stems from its cultural and natural resources in the form of its lake and its biodiversity, which form the backbone of its tourist product. Most of its scenic places of attraction are located in the rural and remote areas of the country. In this regard, most of our tourism activities are centered around rural areas where the majority of the country’s poor are based, giving me hope that this sector will make significant contribution towards uplifting the socio-economic status of the rural communities. And, with the current investments taking place in the sector, including conservation and re-stocking efforts, I am optimistic about the future of Malawi tourism.”

Honorable Joseph Mwanamvekha, MP, 
Minister of Industry, Trade, and Tourism; Republic of Malawi

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“The theme within Mali’s Ministry of Handicrafts and Tourism is ‘Working Together’ to ensure that tourists are coming back to Mali after the crisis. One of our plans is to continue to invest in our youth so they can be active participants within the tourism sector to alleviate poverty in the country. The Ministry has designed four guiding pillars for the sector – training, creativity, excellence, and job creation – which we believe will benefit all of Mali.”

Honorable Nina Walet Intalou, 
Minister of Handicrafts and Tourism, Republic of Mali

“The Republic of Guinea is well known for its potential touristic sites. The country is divided in four distinct natural regions with an elusive contrast, rich fauna, dense flora, and a rich cultural and artistic diversity. Since the 3rd republic, there has been a real desire on the part of the new authorities to make tourism one of the essential links in the national strategy to accelerate growth and reduce poverty. Considerable progress has been made in hotel and tourism infrastructures by rehabilitating touristic sites and the renovation and new construction of nearly 15 hotels. In order to make the industry play a decisive economic role in accelerating growth in the coming years, Government has integrated it into its strategies and actions – the ‘Five-Year Plan 2011-2015’ and the ‘Guinea Vision 2035.’”

Honorable Thierno Ousmane Diallo, 
Minister of Tourism, Hospitality Industry and Handicrafts, Republic of Guinea
Africa Common Passport as a Catalyst to Boost Intra-Africa Travel and Trade

During the Twenty Seventh (27th) Ordinary Session of the African Union Assembly of Heads of State and Government, which took place in July 2016, in Rwanda, the Chadian President, H.E. Idriss Deby, remarked on receiving the African Union passport, “I feel deeply and proudly a true son of Africa after receiving this passport.” Two months later, African billionaire businessman, Mr. Aliko Dangote, in a CNBC Africa interview given in September 2016, lamented, “Somebody like me, despite the size of our group, I need 38 visas to move around Africa. You go to a country that is looking for investments; that particular country will give you a run around just to get a visa. They are giving you visas as if it is a favor.”

The views presented by the above-mentioned prominent African political and business leaders tell differing stories. President Deby was speaking about his feelings on the acquisition of the African passport, as well as how the adoption of the passport by all African countries would fast-track integration on the continent to achieve socio-economic growth for the well-being of its citizenry. Then, there is the other experience, as narrated by Mr. Dangote, which tends to frustrate African citizens. Some African countries are getting stricter in terms of their visa requirements. Apart from a letter of invitation and an itinerary, one is required to also show proof of company registration, bank-account statements, and tax-clearance certificates. In some cases, the required documents have to be translated into the official language of the country issuing the visa, if the documents are in other languages. Even when the visa requirements are met, visas are not issued on time. More so, transit visas are required when transiting to countries that do not have direct connecting flights.

It is well documented that strict visa regulation brings about differentiated negative socio-economic spin-offs. The share of intra-Africa total trade is about 12%, slightly higher than Western Asia which stands at 9%. The rest of the intra-regional trade at the global level enjoys high volumes, with North America and the European Union trading within their blocs at 61% and 62%, respectively. However, it could be argued that Africa’s low intra-regional trade stems from the fact that economies of African counties are premised on primary produce, making it less attractive for the countries to trade amongst each other. However, the argument is denigrated by the other indicators, in which cost of doing business is higher in Africa than in other regional groupings.

In another related development, the lack of free movement of people, goods and services on the continent impacts negatively on economic growth and job creation. For example, highly skilled Africans who needed to ply their trade outside their home countries, usually migrate to other continents searching for pastures new, instead of sharing and transferring their skills with fellow Africans in other African counties. Many unfortunate ones have been found dead in the Mediterranean Sea, while trying to emigrate to Europe and other parts of the world. Wealthy and highly skilled Africans are normally encouraged and attracted to invest and work in the global north. Ironically, African countries tend to attract foreign expatriates from the global north to work in the local service sectors at a significant cost. Bringing in foreign expatriates at higher cost is a major impediment to Foreign Direct Investments.
Africa boasts a rich and diverse cultural heritage as well as natural assets, in terms of dramatic landscapes and unique flora and fauna, which should render the continent the preferred tourism destination. Moreover, there are a number of factors that can drive the continent’s intra trade and travel, including improved air access, mega infrastructure projects, and a skilled workforce. However, these factors require heavy investments and resources to come to fruition. In contrast, more relaxed visa policies do not require lengthy processes and huge resources to be introduced. Evidently, countries with relaxed visa regulations reap significant economic gains. One major example in Africa is Seychelles, whose main source of revenue is tourism. Seychelles’ ascendancy in the Sub-Saharan Africa travel and tourism index for almost a decade is reflected in the secure level of employment that its citizens enjoy. The tourism industry in Seychelles contributes about 30% to its Gross Domestic Product (GDP).

If we look specifically at the aviation sector in Africa, it supports about 7 million jobs and contributes US$80 billion to the continent’s GDP. Therefore, relaxing visa policies, especially the adoption of the AU passport, would expand air travel and guarantee more employment and economic opportunities across the continent.

Africa’s regional integration agenda for the economic transformation of the continent has been on the cards for over four decades. The Organization of African Unity (OAU) Charter and the Constitutive Act of the African Union (AU) place emphasis on the ideals of African unity; continentalism; pan-Africanism, and regionalism. The Lagos Plan of Action and the Abuja Treaty proposed the economic, political and institutional mechanism to attain regional integration. Many African leaders have come to the realization that that regionalism is urgently needed to deal with political, economic, and social crises facing the continent. This has been reflected in the various development agendas that African countries have adopted thus far: the New Partnership for Africa’s Development (NEPAD), the overarching development framework for the region in 2001; the NEPAD Tourism Action Plan of 2004—a framework to foster sustainable tourism on the continent; the 2012 adoption of a Framework, Roadmap and Architecture for fast-tracking the establishment of the Continental Free Trade Area (CFTA); Action Plan for Boosting intra-African trade (BIAT), and Agenda 2063.

Nonetheless, scepticism by some persists and challenges the adoption of the common African passport. A number of rebuttals have been advanced to cast aspersions on the concept of a more open continent: the notion that countries will lose their sovereignty; an increased risk to
national security; exposure to regional conflicts; health-related concerns due to the spread of diseases, and migration problems in which jobless people and refugees tend to concentrate in countries which, although possibly more affluent, may not have the accommodation and funding to house, feed and employ a large influx of such people. Other challenges include a lack of technological facility and capacity to issue biometric passports in most Africa countries. Only about 14 countries in Africa currently issue biometric passports.

However, there already exists free movement of Africans on the continent within some Regional Economic Communities (RECs) in Africa, such as the Economic Community of West Africa States (ECOWAS), as well as most of the Southern Africa Development Community (SADC) countries. Furthermore, a few countries such as Rwanda and Ghana offer visas on arrival. Kenya, Rwanda, and Uganda have introduced the UNI-VISA, whereby the acquisition of a common visa can be used to travel to all three countries. The citizens of the three countries can travel to the other counties with the UNI-VISA arrangement, without visas. The existence and implementation of the aforementioned policies in the sub-regional blocs and countries is a demonstration that security concerns and economic migration can be addressed, through the investment of technologies, integrated border control, and identification management systems.

In conclusion, given that the economic benefits of the free movement of goods and services outweigh the minor shortcomings, it would not be too much to ask of the continent to focus and give more priority to a sector that contributes 10% to the continent’s GDP. The policies to attain the economic Holy Grail, which intra-Africa travel and trade could bring, are already in place. What is required now is the collective efforts, as well as the political will, of African leaders to implement the policies, including the adoption of the African passport by 2018. The full roll-out of the common passport would ensure that the likes of President Deby and Mr. Dangote really feel African, as well as free to contribute to the economic prosperity of the continent. In the interim, other similar policies such as: visa reciprocity; visa-free regional blocs; visas on arrival; multi-year visas; standardized and simpler visa processes; and showcasing of African success stories, exemplified by Seychelles’ achievements, should be encouraged.

Dr. Ibrahim Assane Mayaki, Chief Executive Officer, The NEPAD Planning and Coordinating Agency www.nepad.org
Tourism for All – Promoting Universal Accessibility in Africa

With nearly 1.2 billion international tourists travelling worldwide – 4% more than in 2014 – 2015 has marked the 6th consecutive year of above-average growth for international tourism.

The African continent is a clear example of how tourism can constitute a leading economic engine to promote inclusion, awareness, peace and reconstruction and community development so that the multiple benefits of tourism can be capitalized. In fact, with 53 million international tourist arrivals in 2015, 5% of the world’s total, the continent is progressively increasing its numbers every year. The results in the first nine months of 2016 show an increase of 8%, so predictions for the coming years are more than positive and estimate 134 million international visitors by 2030.

It is clear that tourism is one of Africa’s most promising sectors in terms of development, and represents a major opportunity to foster inclusive development, increase the region’s participation in the global economy, and generate revenues for investment in other activities, including environmental and cultural preservation.

Safe, secure, and seamless travel; new technologies; and sustainability-related practices constitute the major pillars and priority areas that UNWTO has set for the coming years. Africa should also address these principles, so that its tourism sector can thrive to its fullest potential. In addition, diversification and authenticity should constitute key aspects in the promotion of destinations. What is certain is that Africa has a major potential if we address key issues such as connectivity, infrastructure development, human resources education, training, and image.

However, all these concepts and principles need to be supported by accessibility-related policies, measures, and views. This was emphasized by the UNWTO who chose as the theme of World Tourism Day for 2016 “Tourism for all, promoting universal accessibility.”

Everyone has the right to access leisure and tourism services on an equal basis, but 15% of the world’s population live with some form of disability which impairs their capacity to reap the rewards of tourism. This is about 1 billion people around the world who may be unable to enjoy the privileges of knowing other cultures, discovering nature at its fullest and experiencing the thrill of embarking on a journey to explore new sights and sounds. Indeed, disabled people, along with young children, seniors,
and persons with other access requirements face obstacles in accessing the fundamentals of travel. Among major challenges are the following: a lack of clear and reliable information on the ease of accessibility for those with disabilities, efficient transportation and public services, and a physical environment that is easy to navigate.

UNWTO believes that all these groups, and sooner or later all citizens, will appreciate the advantages of universal accessibility. We should assume that attainment of this goal is a shared responsibility of all parties involved in the tourism value chain, as well as a business opportunity for companies and destinations.

Africa boasts incredible diversity and heritage. It has amazing natural landscapes – rainforests, savannahs, lakes, and deserts as well as unique animal species like the rhino and lion. These attractions, together with its magnificent cities dating back to ancient times, draw tourists of all ages, all abilities, and all nationalities. Not only is it a matter of justice and of equality that these destinations and attractions should be enjoyed by everyone; it is also a business opportunity bringing immense commercial possibilities for investors and communities.

All of the world’s citizens have the right to experience the incredible treasures of the continent. Therefore, it is highly important that all countries and destinations, as well as the industry, promote accessibility for all in the physical environment, in transport systems, in public facilities, in services, and in information and communications channels.

In that regard, the role and the support of media are essential, in order to publicize initiatives, to increase awareness but also to foster an exchange of views so that “Tourism for All” can be brought to the forefront of the tourism agenda. Creating an adequate policy framework for specific business development strategies, sensitizing the general public as well as the tourism stakeholders, and promoting capacity building within the industry, are some of the strategies that can help accessible tourism to flourish in the African continent.

We are grateful that through publications like the Africa Tourism Monitor, the many dynamics at play in the field of accessible tourism can be brought to the attention of all tourism stakeholders, including policymakers, and thereby increase their awareness of this important cause.

Taleb Rifai,
Secretary-General,
United Nations World Tourism Organization (UNWTO)
http://africa.unwto.org
President Geingob Meets U.S. Investors in Namibia Tourism Sector

On the occasion of the United Nations General Assembly meetings, Namibia President H.E. Dr. Hage G. Geingob launched the “Namibia Commerce and Prosperity Forum” hosted by Rubenstein PR at the historic Crédit Agricole building in New York City.

Meeting with chief executives, business leaders, and investors to explore Namibia’s dynamic, pro-business policies and spotlight investment opportunities, President Geingob began his presentation stressing the beauty of Namibia and the huge potential the country offers for investors, particularly in the tourism sector. President Geingob noted Namibia is an important tourism destination, underlining its unique landscapes, such as its beautiful sand dunes, as well as exceptional conservation efforts, abundant wildlife, and transparent and strong democratic governance systems.

“In Namibia, our key value proposition for international investors is that we provide the gateway or the springboard into Africa. We have well-developed infrastructure, including world-class financial, telecommunications, educational and health services. Namibia further presents significant opportunities for investment in sectors such as goods manufacturing, agriculture (agro-processing), transport and logistics, tourism, and filmmaking,” outlined President Geingob.

Located on the southwestern African Atlantic coast, Namibia is known for exquisite landscapes; vibrant cultural diversity of the Ovambo, Kavangos, and other ethnic groups; stunning dunes and vistas in...
President Geingob explained the tremendous market opportunities in the country. “Namibia is part of SACU, SADC, and has signed the tri-partite free trade agreement, which ultimately will lead to a continental free trade area. Namibia provides international investors access to a market of 270 million people. Namibia is part of an Africa that is rising, and an Africa that is on the march.”

Conservancies and Community-Based Tourism Are Key: 43.6% and Growing

After Namibia gained independence in 1990, it was one of the few African countries to factor environmental protection and conservation into its constitution through the efforts of pioneering conservationists and the Ministry of Environment and Tourism (MET). Starting with only four conservancies in 1998, Namibia currently boasts “79 communal conservancies covering 19.5% of Namibia’s land, with one in five rural Namibians living in a conservancy.” This is a win-win for land resource management, innovative governance structures, and positive cohabitation between local populations and wildlife.

Namibia currently holds 43.6% of land under conservation management programs, which includes communal and freehold conservancies, national parks, and community forests. Article 95 of the Namibia Constitution details provisions for the protection of the environment through “maintenance of ecosystems, essential ecological processes and biological diversity of Namibia and utilization of living natural resources on a sustainable basis for the benefit of all Namibians, both present and future.”

Namibia’s innovative conservation efforts are reaping benefits. According to Namibia Tourism, “Elephant numbers in [the country] have increased from approximately 15,000 in 1995 to over 20,000 today” and Namibia has the world’s largest cheetah and black rhino populations. Moreover, the economic impact of conservation is felt. According to the World Wildlife Fund (WWF), “Since 1998, the [environmental protection] movement has engaged more than 250,000 community members,” and “this has contributed “US$ 5.5 million in annual income and benefits the conservancies generate for communities.”
STRENGTHENING AFRICA’S TRAVEL

11th Annual Presidential Forum on Africa Tourism


The keynote address was delivered by His Excellency Mr. Erastus Mwencha (pictured right), Deputy Chairperson, Africa Union Commission. Mr. Mwencha emphasized the importance of improving the accessibility for Africa travel, advancing IT systems, improving the services sector and human resource training, marketing and branding, managing biodiversity and improving conservation efforts, and increased investment in the sector. “This is a sector that has a lot to

Il "Open Forum on Africa Tourism" Ministerial Roundtable include Ministei da Mali, Namibia, Rwanda, Sierra Leone, and Zimbabwe. Hon. Dr. Walter Mzembi, Minister of Tourism, Republic of Zimbabwe; Chairperson of the United Nations World Tourism Organization Commission for Africa (UNWTO) (CAF); also spoke about his candidacy for the Secretary-General position for the UNWTO in 2017 elections.

Since the Presidential Forum was launched by NYU Africa House and ATA in 2006, more than 20 African countries and representatives from the African Development Bank, United Nations World Tourism Organization, World Travel and Tourism Council, and the World Bank have participated in the event, which has carved a noteworthy space for African tourism on the UNGA agenda. 🌍

ATA’s 41st Annual World Conference in Rwanda

In 2017, ATA will host the 41st Annual World Conference in Kigali, Rwanda, which is known as the land of 1,000 hills. Co-hosted by the Rwanda Development Board (RDB), the ATA conference provides a unique networking, learning, and agenda-shaping platform for Africa tourism stakeholders. For more information on the conference, please visit: http://conference.africatravelassociation.org.
African aviation had a challenging year in 2016. Low commodity prices and regional conflict are expected to contribute to a net loss of US$ 400 million for airlines in the region, or an average loss of US$ 7.84 for each passenger flown. In 2017 capacity is expected to grow by 4.7%, while demand is only set to increase by 4.5%, exerting additional pressure on carriers in the region.

Despite these challenges, the long-term outlook for air travel in Africa remains strong. The International Air Transport Association’s (IATA) updated 20-year passenger forecast sees Sub-Saharan Africa growing 6.5% per year on average to 2035 – making it one of the fastest regional growth rates in the world.

Today aviation in Africa supports US$ 72.5 billion in GDP and some 6.8 million jobs. It connects the continent, transports people and goods to the rest of the world, and brings in economic investment, tourism, trade and aid. With the right policies in place, this contribution could grow substantially in the years to come.

For the continent to unlock the full potential of aviation, governments need to focus not only on national issues but also on the strategic development of pan-African aviation. Policies that promote investment in air transport infrastructure, improve safety and enhance air connectivity must be implemented.

Safety

Safety is the cornerstone of any successful aviation business and must be the number one priority for the aviation industry in Africa. Governments should work closely with global bodies including the International Civil Aviation Organization (ICAO), IATA and the Flight Safety Foundation (FSF) to accelerate the implementation of the Africa Strategic Improvement Action Plan (ASIAP) contained in the Abuja Declaration.

Connectivity

Despite Open Skies pledges – 1988 Yamoussoukro Declaration and 1999 Yamoussoukro Decision – being signed by most African countries, implementation has been unhurried and restricted. Protectionist policies favoring
national airlines remain abundant. Implementation of the Yamoussoukro Decision will open up air routes within the continent and provide opportunities for more than 5 million additional passengers a year.

Infrastructure
Cost-effective infrastructure development is critical to sustaining and expanding African aviation. That is why consultation with airlines on charges and fees is essential. Sadly, all too often this is not the case. ICAO has very clear guidelines on infrastructure funding. Development should be guided by the principles of non-discrimination, consultation, transparency, cost-benefit, and no pre-financing.

Taxes and Charges
Along with infrastructure costs, taxes are also an unavoidable fact of life for airlines. However in Africa the taxes and charges on fuel are much higher than the global average. For example, on a global basis, fuel represented around 19% of airline operating costs in 2016, whereas in Africa it represented about 30%. These taxes add to the burden of airlines, which are already operating in a challenging environment. The negative impact on the economy of taxing air transport often outweighs the revenue raised. This must be addressed by Governments. Aviation has the potential to make a much more significant contribution to economic growth and development in Africa if its power is unleashed.

International Air Transport Association (IATA)
www.iata.org
This year marks a milestone in Arik Air’s history – 10 years of connecting travelers to Nigeria and across Africa. As Africa’s most populous nation, Nigeria is known for its bustling cities, vibrant culture, latest fashion trends, booming tech industry, Nollywood, oil exports, and West/Central Africa’s largest airline.

With expansion in the oil and energy sectors and a growing population, Nigeria drives a strong inflow of business and leisure travelers in the country. With a population of over 186 million, there is a strong market for major economic powers, mostly the E.U., U.S., China, and India. As commodity imports rise, oil and gas sectors remain Nigeria’s main foreign exchange earners. Apart from these two factors, the U.S. Census Bureau indicates that Americans of Nigerian origin make up the largest population of the African Diaspora in the U.S., which creates a tremendous opportunity for the aviation industry to cater to this untapped travel market.

The Early Days: Driven by Market Possibilities

With Nigeria’s robust economy and significant population, there was a demand for a homegrown airline to compete in the global aviation industry, which was dominated by foreign airlines. The demise of the Government-owned Nigeria Airways in 2003 led to the total control of the Nigerian international airline market by foreign carriers. The Nigerian international aviation industry witnessed rapid growth between 2003 and 2009, with a predominance of foreign airline carriers led by British Airways, KLM, Lufthansa, Air France, and Virgin Atlantic.

Nigerians were looking to a national carrier with the potential to give a sense of national pride, an airline that not only serves them in their language but also provides culture tailored on-board services. Thus, in October 2006 Sir Joseph Arumemi-Ikhide officially inaugurated Arik Air. In order to provide quality service to passengers, Arik took delivery of three brand new Bombardier CRJ900 aircraft, making it the first operator of CRJ900 in Africa. Arik’s major hubs grew from Lagos and Abuja. Within six years of operation, Arik grew to successfully fly over 10 million passengers, making it the largest airline in Nigeria and West Africa. Between 2006 and 2009, Arik had the largest market share in the domestic aviation market at over 50%.
In Arik’s quest to open Nigeria to the world and operate a truly global airline with world-class standards, in 2007 Dr. Michael Arumemi-Ikhide established Arik Air International in London, which operates as the overseas corporate office of Arik Air. London became Arik Air’s first long-haul flight from Lagos, with a newly acquired Airbus 340-500 equipped with a super flat bed in premier class. In 2009, Arik started its second long-haul flight from Lagos to Johannesburg, South Africa; then added three non-stop flights per week from Lagos to New York; and expanded to several destinations in West Africa, including routes in Benin, Ghana, Gambia, Senegal, and Sierra Leone.

In 2010, Arik successfully completed the IOSA (IATA Operational Safety Audit), which led to admission into IATA the following year. Arik Air expanded at a rapid rate between 2009 to 2013, when it introduced several flights from Lagos to other parts of West Africa, then launched its second wave of expansion into Central Africa by connecting Lagos to Douala, Cameroon, and then onto Kinshasa in DRC.

In 2013, Arik’s management efforts to invest in equipment and qualified staff materialized when the company recorded a tremendous 18.6% increase in passenger traffic from passengers flown the year prior (an increase from 2,315,247 to 2,745,400). By the end of 2013, Arik had flown almost 14 million passengers.

Increasing Connectivity: Going from Local to Global

Celebrating 10 Years of Excellence

Today Arik Air maintains the largest fleet in Nigeria and in West/Central Africa with 28 short, medium, and long-range aircraft. Employing over 3,000 staff worldwide, Arik serves 31 destinations across Nigeria, West Africa, Central and South Africa, and two international routes in London and New York. Starting with three daily flights between Lagos and Abuja in 2006, Arik now operates an average of 110 daily flights across the network.

In commemoration of Arik’s 10th anniversary, Chief Executive Officer Dr. Michael Arumemi-Ikhide stressed, “We have succeeded in providing world-class experiences and services which are safe, reliable and continually contribute towards both improved user-quality of life as well as the elevation of Nigeria’s global standing.”

Rafiu Afolabi Laguda, Corporate Account Manager-USA, Arik Air International
www.arikair.com
The Role of Kenya Airways in Africa’s Tourism

Stacy Mweni had always wanted to travel to Cape Town. For years, she heard much about the South African city and spent a measurable amount of time reading more about it. This year, she started a savings plan to travel to her dream destination, planning her travel meticulously.

In April, she read that Kenya Airways had introduced a direct flight to Cape Town, through Livingstone, Zambia, and she quickly booked her ticket months in advance. In August, she boarded the flight to her dream destination, planning her travel meticulously.

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Mweni’s journey is the story of many who every month board flights to their dream destination on holiday or to sign the next business deal. The expansion of travel and connectivity has made it easier for people to travel across the continent for both leisure and business travel.

Connecting the Continent and the Tourism Industry

Africa boasts a wealth of beauty and diversity for the world to see. In the past decade, African Governments have acted to leverage all that Africa has to offer by investing in the growth of the tourism sector as a key economic driver. Tourism in Africa has been on the rise during this period and air access has been key to this. Tourism is one of the largest and fastest growing sectors of the world economy and tourism in Africa is ripe for development.

Airlines, such as Kenya Airways, play a major role in connecting African
countries to each other, connecting Africa to the world, and connecting the world to Africa. Today, Kenya Airways connects over 40 African cities, allowing ease of travel for leisure tourism and business travel.

With improved connectivity of about 30 percent through its hub in Nairobi, Kenya Airways prides itself on an efficient service that can get you to almost all corners of the continent within five hours on a direct flight. Today, one can have breakfast in Nairobi, lunch in Johannesburg, and dinner back in Nairobi.

Boasting one of the newest fleets in on the continent with its new Boeing 787 Dreamliner, and a new lounge in its hub, Jomo Kenyatta International Airport (JKIA), the airline offers its guests an unparalleled travel experience.

In a bid to spur travel, Kenya Airways has deliberately formed partnerships that enable growth of destinations and has signed a partnership with the travel booking company Wakanow in Nigeria and with the Mauritius and Seychelles Tourism Ministries.

By working with the private sector, the airline is able to connect travelers across the continent and beyond. In addition, the airline has a Holidays subsidiary (KQ Holidays) that offers all-inclusive packages to various renowned holiday destinations across the network.

In October 2016, the airline rolled out an African-wide campaign that connects various destinations across the continent. It goes into markets to showcase the beauty of the continent, offering attractive travel packages.

**Driving Local Value Chains**

The airline’s Chief Executive Officer, Mbuvi Ngunze, has remarked that Kenya Airways runs the largest restaurant in Kenya, on air. Welcoming about four million passengers annually, KQ serves meals with most of the ingredients sourced in Kenya.

Kenya Airways is a major player in Kenya’s economy, more so through the value chain it offers, supporting the livelihoods of tea and dairy farmers, local juice producers, transport companies to ferry the goods, and contributions to tax revenue. Every dollar spent by tourism in the local economy has an impact that trickles down the value chain, supporting millions of Kenyan families.

Globally, countries have increasingly benefited from tourism as international arrivals grow. These arrivals are connected with the transport sector, and more so with international airlines. The relationship between the aviation sector and tourism is integral. Quick and efficient transportation spurs travel for various reasons as destinations have become more accessible. Kenya Airways is proud to have played a major part in expanding travel horizons.

Kenya Airways

www.kenya-airways.com
APPLYING TECHNOLOGY IN TRACKING

Africa’s rapid economic development has the potential to improve the livelihoods of millions of people living in poverty across the continent. As the continent develops, however, its wildlife and wild lands are being impacted, resulting in major declines of many wildlife populations and a loss of ecosystem services. Wild lands represent the last places on Earth to provide those ecosystem goods and services – water, clean air, tourism, fertile soils, and so on – necessary for the development and human well-being to which Africa now aspires.

Africa’s prospects for a prosperous yet sustainable future will hinge on the status of its ecological assets, which are anchored by Africa’s expansive protected area network. Africa boasts more than 1,100 national parks and reserves. Tourism is emerging as a top foreign exchange earner in many countries and further provides an alternative to Africa’s current growth model, which is dependent on commodity exports.

However, to ensure development that leverages, rather than destroys, Africa’s many ecological riches, conservation must embrace technology. Already, advances in conservation biology, agricultural ecology, plant breeding, ecosystem monitoring, and computer-based modeling are revolutionizing our ability to understand and plan for wildlife–habitat–human interactions, to the benefit of both people and nature. It also provides critical information to Governments, as well as to a wider constituency, on the role of wildlife crucial to Africa’s development aspirations – as well as how best to align development and conservation.

One place where the use of technology has been critical in this effort is the Dja Faunal Reserve in Cameroon. This World Heritage Site is one of the few places on Earth where a fortunate person might see the endangered central chimpanzee, the critically endangered western lowland gorilla, and the endangered forest elephant in a day’s outing. The iconic wildlife and their habitat, however, face accelerating threats from sophisticated poaching networks, as well as from commercial hunting, logging, and agriculture. Commercial logging and agriculture further spur demand for bush meat and facilitate access to hunters.

Dja is a remote, 5,300-km² reserve with poor transportation and communication infrastructure. Law enforcement patrols serve as one of the most effective tools and significant investments to address the range of threats here. Limited financial resources and the small number of trained rangers, however, mean such
patrols are only able to cover a fraction of the reserve area in a given year. Decisions on where and when to deploy patrols must be made with consideration of available intelligence on threats.

Until recently, the reserve manager’s sense of where the threats and wildlife were located was largely based on experience, prior patrol reports, and occasional insights from community members. Up-to-date information and maps about the distribution of wildlife and threats were scarce.

Today, however, the manager has significantly more intelligence to work with. In 2014 and 2015, African Wildlife Foundation (AWF) provided training and equipment designed to make law enforcement monitoring easier and more effective. Dja rangers now record wildlife and threat observations while on patrol using rugged handheld smartphones equipped with monitoring software called CyberTracker. They then download these observations into the Spatial Monitoring and Reporting Tool (SMART), software that integrates this information with prior patrol data for mapping and analysis.

AWF has gone a step further by using the patrol observations and geographic information systems (GIS) technology to create spatial models predicting where in the reserve there may be high concentrations of wildlife and where there may be high levels of threats. The AWF models essentially integrate patrol observations with observations of deforestation, cultivation/settlement expansion, and forest fires extracted from satellite imagery. A model profiling the combined threat level is then overlaid atop wildlife distribution information, largely taken from ranger patrol data.

The resulting map provides the reserve manager with a powerful snapshot of wildlife and human activity dynamics at a glance, which he can use to prioritize areas for siting patrols and outposts. The manager used to face a vast, 5,300-km² reserve with little information. Today, the spatial models created by AWF suggest that the areas that most require intervention represent less than 5% of the reserve. Using the frequently updated patrol and satellite information, models can be updated quarterly, thereby giving the reserve manager actionable, timely information. He is now able to maximize his limited ranger resources to those locations within the reserve that will make the greatest impact.

In Dja and elsewhere across the continent, mammal populations have declined significantly over the last four decades. The health of Africa’s wildlife species is a visible proxy, a measure of our ability to live in balance with the natural environment. Technology-enhanced interventions, such as those that AWF has applied in Dja, enable Africa’s wildlife authorities and Governments to make evidence-based decisions to more effectively protect the continent’s wildlife species and ecosystems.

Only when we leverage these capabilities to conserve our natural heritage will Africa be able to enjoy long-lasting development and sustainable prosperity. 

Kaddu Kiwe Sebunya, President, African Wildlife Foundation
The oldest and largest pan-African conservation organization.
www.awf.org
Africa is a high-growth continent, rich in tourism and development opportunities. The African Development Bank (AfDB) estimates that foreign direct investment has increased fivefold to US$ 50 billion since 2000. As tourists and business travelers flock to the continent, they all have one thing in common: the need to get around efficiently and reliably.

Uber is a reliable, affordable, and safe service. With seamless technology in place in more than 450 cities across 72 countries, it is fast assuming a significant role in the global tourism industry. Its flexible platform allows visitors to request a ride in minutes, and reach areas underserved by public transport routes. The AfDB notes that roads remain the key mode of transport on the African continent, carrying at least 90% of all passengers. This means that Uber’s contribution to reducing traffic congestion and pollution through reducing the need for personal vehicles is critical.

The Uber platform has created thousands of economic opportunities across the continent, allowing drivers to become their own boss and make money flexibly and safely. Drivers in Kenya can even get better priced loans with Sidian Bank based on how riders rate their service. Through the launch of the Vehicle Solutions Program in South Africa with partner WesBank, Uber has facilitated access to over R100m worth of vehicles for entrepreneurs on the platform. With FirstBank, Uber driver-partners in Nigeria are also able to apply for finance for used vehicles based on how riders rate their service.

Women are also a top priority, with Uber aiming to bring one million women drivers onto the platform by 2020. This bucks the trend of a historically male-dominated industry.

According to the Department of Tourism in South Africa, tourism
has boomed in the country growing from four million visitors in 1994 to just under nine million in 2015. As tourism to cities such as Johannesburg increases, Uber is witnessing a growing number of foreign visitors turning to their platform, which has become synonymous with access to reliable travel. Every driver-partner and vehicle undergoes a comprehensive approval process, and the trackable GPS technology ensures that riders never feel lost in an unfamiliar city. In 2015, international riders made up almost 29% of total Uber requests in South Africa. The familiarity of Uber, combined with the convenience of being able to input your destination without any language barrier challenges, makes it a natural choice.

Since we first launched in Africa, in Johannesburg in 2013, we’ve launched another fifteen cities across eight African countries – including three new countries in just three weeks in June 2016. Not only have we added new places but we have launched new businesses, such as UberEats in Johannesburg, which is an on-demand food delivery app powered by the Uber platform.

Around 60,000 drivers now use Uber across Africa – that’s the equivalent of creating 54 economic opportunities every day since we started. We believe we can do more.

As tourism and business boom in Africa, Uber continues to reinforce its confidence in the continent as an important driver of the global economy, through its investment in growing its platform across African cities.

Alon Lits,
General Manager,
Uber Sub-Saharan Africa

www.uber.com
Travel and tourism contribute immensely to global economic growth, as well to that of Africa. For the fifth successive year, the sector growth of global tourism at 2.8% outpaced that of global GDP growth at 2.3% in 2015 while accounting for 3.3% of the GDP. Tourism’s contribution to employment remains unrivaled, representing one in every 11 jobs. This highlights the pivotal role of the sector, and the urgent need to be part of the growing eCommerce wave, which continues to impact virtually all retail sectors.

A survey by marketing analytics firm Euromonitor estimates that 96% of travel research is done online, with travelers visiting more than 14 websites before booking. These findings are well corroborated by trends observed at Jumia Travel; the need for price comparison tools, the quest for connected facilities, and online sharing of experience are on the rise.

Key Drivers
Increasing mobile penetration, a youthful population, and better connectivity have acted as pillars to the rise of eCommerce. Mobile sales in digital travel seem to be taking center stage, presently accounting for 49% of total sales as reported by Criteo.com, a leading online advertising solutions company. This is also corroborated by eMarketer, who placed digital travel sales “above 40%” in 2013. The ripple effect of the online shift is well documented across different aspects of digital travel; in Jumia Travel for instance, mobile...
bookings have grown from 10% in 2014 to the 60% currently. There is an undeniable leapfrog from eCommerce to mCommerce in Africa, and retailers must respond to the call for mobile-centric solutions, as mobile devices are more likely to form the first point of contact and access to internet.

However, it must be noted that about 65% of mobile subscribers in Africa still operate feature phones, according to the Pew Research Center. Businesses must devise ways to decouple the purchase process from a web-only service to enable them tap into this market. The availability of mobile payment solutions has played a great role in catapulting digital travel. Although the success stories differ acutely across the region, the continent has shown great adaptability to the model, owing to the high ratio of the unbanked population. The possibility of a seamless process – from research, booking, to payment – offers great convenience to travelers. The mobile money market in Africa is predicted to be worth US$ 14.27 billion by 2020.

Positioning Africa and Overcoming the Challenges
Low internet penetration and access to connectivity is a major detractor, both in the travel sector and beyond. For instance, 50% of hotels on Jumia Travel had no online presence prior to our entry. This was either as a result of low internet literacy, lack of access to connection, or costly connection rates where available. However, by partnering with us, such hotels can now enjoy a level playing field with more developed properties.

Lack of awareness and consequent lack of trust also impede growth. While hard transactions are carried out in the “bricks and mortar” setup, online sellers must win the trust of the buyer through educating them and demystifying their offer way before they get to the point of purchase.

The Government’s input is required in facilitating the ICT structure, from creating a conducive business environment for online startups to promoting internet accessibility and regulating the sale of internet-enabled devices.

About Jumia Travel
Formerly Jovago.com, Jumia Travel is Africa’s No.1 hotel booking website, allowing customers to get the best prices for more than 25,000 hotels in Africa and more than 200,000 hotels around the world. Jumia’s ambition is to bring every bit of available accommodation online, and to create the easiest and cheapest way for customers to book it.

At Jumia Travel, there are hundreds of travel specialists constantly in touch with our customers. Jumia offices are located in Lagos (Nigeria), Accra (Ghana), Dakar (Senegal), Abidjan (Ivory Coast), Algiers (Algeria), Douala (Cameroon), Kampala (Uganda), Dar Es Salaam (Tanzania), Nairobi (Kenya), Addis Ababa (Ethiopia), Porto (Portugal), and Paris (France). Jumia Travel was founded in 2013 by Jumia and is backed by MTN, Rocket Internet, Millicom, Orange, Axa, and financial partners.

Estelle Verdier-Watine, Managing Director, East & Southern Africa, Jumia Travel
travel.jumia.com
Social Media: Creating Africa’s New Narrative

Africa is a continent rich in diversity, 54 countries, each with their own unique history, culture, and natural wonders. In promoting Africa’s tourism products, the challenge has always been how to combat negative news with a more proactive positive narrative, creating stories that reflect Africa as the vibrant and inspiring continent that it is.

Today, for most travelers, it is all about the experience. In this digital age of social media, it is easier than ever to instantly create content and communicate the “African Experience” in real time. Each country offers its own distinctive and alluring travel narratives. The wealth of visual content and local experiences are all there: the plethora of festivals celebrating food, music, dance, art and film; wildlife safaris, adventure and sports; and Africa’s famous natural wonders and national parks.

Engagement is Key
Marketing and promotion are now as much about using social media platforms to increase the ROE (Return on Engagement) as they are about the more traditional measurement, ROI (Return on Investment). A key first step to achieve more engagement is to tap into what is trending on social media, then identify and connect with those social media influencers, bloggers and vloggers who are focusing on these trends. Invite them to experience the destination for themselves, as individuals or in a small media group. The media itineraries should be carefully curated to include experiential activities and themes. Depending upon the influencer’s focus, the program could be infused with local cuisine, fashion, music, dance, adventure, philanthropy/volun-tourism, and of course what Africa is best known for, wildlife safaris and opportunities to meet the locals.

Celebrity Brand Ambassadors
Engaging a Celebrity Brand Ambassador or Key Opinion Leader (KOL) is another social media strategy that can
increase the ROE and result in an instantaneous destination promotion. A Celeb/ KOL Brand Ambassador is an effective way for a destination’s key messages to go viral and to gain followers for the brand by showcasing the destination on the Celebrity’s account as well as featuring the Celebrity on the destination’s social media platforms. The Brand Ambassador engagement can also be negotiated on a more limited scale, inviting the Celebrity to experience the destination first hand and to create a social media takeover live on location.

Millennial Travelers: Future Social Media Brand Ambassadors for Africa

It is well known that the millennials, who thrive on social media platforms, also represent the largest growth market for travel. The millennials travel more and spend more on travel. According to TheGBrief, “They travel more often than other generations for business (4.7 times each year) and leisure (4.2 times per year). They already spend roughly US$ 200 billion a year on travel as 22% of all travelers, and that spending will only increase.”

The millennials themselves, as they travel to Africa as tourists, as volunteers or on business, are fast becoming a new generation of Brand Ambassadors, sharing their Africa experiences, in real time, with friends and family.

Karen Hoffman, President; Bianca Pappas, Director, Media Relations and Client Services; The Bradford Group
www.bradfordglobalmarketing.com
Climate Resilience and Coastal Tourism in The Gambia:

Building Resilient Tourism Products, Coastal Protection, and Heritage Preservation

The Gambia’s growth and development are inextricably linked to the tourism industry, which is a major economic activity that has major impact on the natural environment, people, and their economic activities. The tourism sector contributes 16% to The Gambia’s GDP. Climate change is a phenomenon that affects The Gambia’s tourism sector, and, in particular, the coastal destinations and heritage sites. Changing climate and weather patterns can significantly affect the tourists’ comfort and their travel decisions. Furthermore, demand patterns and tourist flows have impacts on tourism businesses and on host communities, as well as related sectors such as agriculture, handicrafts, construction, and fisheries, according to the UNWTO. Any significant reduction in tourist arrivals will have serious employment impacts and generate further poverty. Consequently, in The Gambia, tourism is at the leading edge of the global response to climate change, thus its commitment to building resilient tourism products, coastal protection, and heritage preservation.

Geographically concentrated along the Atlantic coast, constituting the Tourism Development Area (TDA), the majority of the accommodation facilities operate with a strong focus on beach tourism. The 81 km of coastal zone serves as a zone of economic importance, but experiences high rates of erosion estimated at 200-300,000 m³ annually (Draft Country Program Document for The Gambia, 2012-2016). Coastal communities are economically vulnerable to climate change in The Gambia, particularly in the tourism, agriculture, and fisheries sectors. This is owing to urban sprawl into the coastal area, unsustainable agricultural, and cultural practices resulting in the habitat degradation of coastal vegetation and ecosystems, thus affecting the poorest socioeconomic groups.

Enhancing the Resilience of Vulnerable Coastal Areas and Communities to Climate Change

The four-year project “Enhancing the resilience of vulnerable coastal
areas and communities to climate change” is designed to reduce The Gambia’s vulnerability to sea-level rises and associated impacts of climate change in five districts (Kotu, Tanji, Bintang, Darsilami, and Tendaba). It does this by improving coastal defenses and enhancing the adaptive capacities of coastal communities. This US$8.9 million project is funded by GEF/LDCF through UNDP, and is scheduled for completion in 2017. The proposed project will enable successful community-based adaptation approaches in coastal areas to be analyzed and replicated in other vulnerable regions, both within and outside of The Gambia. The project among others has seen the importation of sand and boulders to reclaim the lost beaches at the Senegambia; the transplanting of mangroves at the Tanbi wetlands and other parts of the coastal wetlands in the Greater Banjul Area; and supported programs of sustainable community and environmental development.

The Collaborative Actions for Sustainable Tourism (Coast) Project
Cognizant of the need for intervention, the COAST Project (funded by GEF, UNEP, UNIDO, and UNWTO) was implemented in The Gambia with the objective of supporting the adoption of best practice approaches for sustainable tourism. This intervention was recommended for governance and management in a number of fields, including policy frameworks, governance structures, coastal zone planning, influencing tourism development and operations, managing coastal environments, and supporting community livelihoods.

Eco-Village Design Education Program (EDE)
The overall objective of the project is to promote the development of eco-villages, both within and outside The Gambia, as a means of preventing the degradation of natural and heritage resources whilst exploiting and optimizing their use to stop the rural-urban drift of people. The EDE program also promotes localized business as a way of alleviating poverty and generating employment, particularly through community-based tourism (CBT).

The program is designed to build resilience by using eco-village principles and identified responsibilities for investors and communities in the ecotourism sector. Kartong, an area earmarked for ecotourism development in the Tourism Development Area (TDA), was used to engage nine coastal communities in The Gambia, as well as communities from southern Senegal and Guinea-Bissau, in order to build communities with a shared potential for ecotourism.

Fatou Beyai Raji,
Director Product Development Investment and Culture, Gambia Tourism Board
www.visitthegambia.gm
Ghana’s role in African integration and liberation dates back to the late 1950s, when the country’s first President Osagyefo Dr. Kwame Nkrumah championed and supported fellow African countries to gain independence from colonial rule. As the first sub-Saharan African country to gain independence, Ghana worked towards One Africa, with a significant role being played by Dr. Nkrumah in the organization of the then Organization of African Unity.

As a bastion of pan-Africanism, Ghana has pointed the way towards African unity through many initiatives and the landmark announcement by the President of the Republic of Ghana, H.E. John Dramani Mahama, in his State of the Nation address to the Parliament of Ghana. This commitment was consequently reaffirmed during Ghana’s independence celebrations at the Black Star Square in March 2016, which pledged allegiance to the principle of African continental integration, which is a key tenet towards the realization of the African Union’s Agenda 2063, “The Africa We Want.”

President Mahama stated, “With effect from July this year, we will be allowing citizens of African Union (AU) Member States to enter our country and obtain visas on arrival with the option to stay for up to 30 days and experience what our country has to offer. This measure, with time, should stimulate air travel, trade, investment, and tourism.”

The travel and tourism industry was a major beneficiary in the announcement of this policy, as it was seen as a move to promote Destination Africa and an opportunity for fellow Africans to engage themselves for economic benefit. It was also the first major action by an AU Member State following the adaptation of the resolution at the Organization’s Executive Council meeting held earlier this year in Addis Ababa, Ethiopia.

The President of the AU Commission, Her Excellency Dr. Nkosazana Dlamini Zuma, tweeted immediately by applauding the move by the President of Ghana. She emphasized “Ghana’s 30-day visa on arrival for all AU Member States will ease free movements of people, enhance integrate and drive prosperity...”

The United Nations World Tourism Organization (UNWTO) and the World Travel and Tourism Council (WTTC) have long advocated travel facilitation as a means to promote tourism development and multiply its socio-economic benefits.

The latest UNWTO openness reports buttress the need for visa facilitation. On average, 18% of the world’s population was able to travel to a destination without a visa in 2015, while another 15% received visas on arrival, and 6% were able to obtain e-visas.

As the UNWTO Secretary General, Taleb Rifai, states, “Prioritizing travel facilitation is central to stimulating economic growth and job creation through tourism. We are pleased to state that a growing number of Governments around the world think alike.”

Ghana’s Minister of Tourism, Culture, and Creative Arts; Elizabeth Ofosu-Adjare; addressed the media at the 50th International Tourism Bourse (ITB) in March 2016 at the travel fair in Germany. She said, “The President’s announcement will ensure that travelers go through a hassle-free process in acquisition of a visa. Visa has always been a challenge for travelers and now that you don’t need to acquire a visa prior
Borderless Africa

demand for hotel accommodations and restaurants as well. This move will eliminate the headache most travelers encounter from the processes and bureaucracies involved in obtaining a visa ahead of travel. Coming to Ghana has never been easier, especially for African travelers, as the stress in frequenting embassies with loads of supporting documents and cost will be a thing of the past.

This new policy is expected to boost the arrivals from 1.2 million to 1.4 million with an upsurge in travelers from the continent. The Ghana Tourism Authority is poised to encourage more Africans to visit with this policy, coupled with the refurbishment of the airport infrastructure at the Kotoka International Airport.

Promoting a borderless Africa will stimulate the economies of the continent and also boost the continent’s share of the global tourism arrivals, which presently stands at 5.3%.

Kojo Bentum-Williams,
Senior Public Relations Officer,
Ghana Tourism Authority
www.ghana.travel
Kenya’s e-Visa System is revolutionizing travel.

Travelers are always looking to make the process of planning a trip less stressful. This applies not only to business travelers who invariably have a tight itinerary, but also to those looking for a perfect family holiday that includes young children. Figuring out the right flights with adequate luggage allowances, hotels and local transport can be a nightmare. Securing a visa can also add to the angst. Even those countries that allow for visas on arrival cannot guarantee that there will not be long, snaking queues or lengthy forms to complete.

Enter Kenya’s e-Visa portal. After a successful two-month pilot program, the portal was launched on September 1, 2015 requiring...
Kenya’s e-Visa System is Revolutionizing Travel

visitors to have already acquired an electronic visa by the time they get into the country.

With just 10 quick and easy steps to follow, payments via credit or debit card, and just two processing days, the e-Visa is making travel to Kenya far easier and seamless. It is also the first country to offer the online visa application in East and Central Africa – a factor that has helped to position the country as a prime tourism destination. The introduction of the e-Visa means that visitors spend far less time at the point of entry.

Kenya Tourism Board
www.magicalkenya.com

Kenya
www.MagicalKenya.com
Service excellence is critical in the tourism industry as it can be used to benchmark performance against world-class standards. Mechanisms such as the grading framework, by the Tourism Grading Council of South Africa (TGCSA), add value to the provision of service in South Africa’s tourism industry as they place a stamp of quality on a tourist establishment.

The TGCSA grading framework allows for the award of one to five stars based on the quality of services and amenities available, with five stars representing the top of the range in the South African hospitality sector. Although grading remains a voluntary process, official recognition by TGCSA – particularly the awarding of four or five stars – is highly sought as a recognition of excellence that will attract more visitors. This is because TGCSA’s grading program is both globally benchmarked as well as internationally competitive.

According to Darryl Erasmus, Chief Quality Assurance Officer at TGCSA, South African Tourism is all about enabling the international traveler to enjoy truly authentic experiences in South Africa. As such, the grading council supports this by asking what do international travellers need and what are the standards they are accustomed to.

“In the tourism industry, quality assurance has become synonymous with the stars adorned in our national flag greeting visitors at the entrance of hundreds of accommodations and meetings, exhibitions and special events establishments throughout the country,” Erasmus said. “When local and international visitors see these stars they know that they can expect high standards of quality and service excellence pledged by the Tourism Grading Council of South Africa.”

It is reassuring for consumers to know that grading is a constant quality control tool in South Africa. However, grading is not only for the benefit of consumers but also assists organizations in positioning their products and services. Consequently, all graded organizations are listed on the TGCSA website with contact details and a link to the organizations’ websites for reservation purposes.
There are other benefits too, such as Government departments’ requirement to procure services from graded establishments only. TGCSA subsequently market, through the mechanisms and platforms of South African Tourism, star-graded facilities directly to consumers, tour operators and travel agents. In this way, TGCSA offers the tourism industry a progressive and collaborative service where South African Tourism and suppliers of products and services become partners for success and growth.

To become a TGCSA-accredited assessor, one must have previous hospitality experience and knowledge, such as a 3-year tertiary qualification in Tourism and Hospitality. Prospective individuals then have to complete the Tourism Grading Council approved accreditation training course. This is to further broaden their understanding on the dynamics of this highly demanding industry, as well as the integrity and commitment it takes to be a TGCSA assessor.

“If the industry is to benefit, and benefit fully, from the work we do at TGCSA, we need a group of credible, professional and committed specialists to engage the industry, advise them on quality assurance matters, and work with them to make sure they get the best value through the many marketing benefits we offer for their grading,” Erasmus concluded.

Tourism Grading Council of South Africa
www.tourismgrading.co.za
Hotel Chain Development Pipelines in Africa 2016

I am pleased to present here a summary of the 8th edition of W Hospitality Group’s annual survey of the hotel chain development activity in Africa. We first produced the survey in 2009, with contributions from 19 international and regional hotel chains, which reported between them a pipeline of 144 hotels and almost 30,000 rooms. In this 2016 study, we have 36 contributors with a total of over 64,000 rooms in 365 hotels. This massive increase comes not only from more contributing hotel chains, but also higher activity from those included back in 2009 – Hilton, as just one example, has increased their pipeline from five hotels (1,200 rooms) in 2009 to 36 hotels (8,500 rooms) in 2016.

AccorHotels’ mega-deal in Angola dominates much of the data presented in the report. In July 2015, they signed with AAA Activos LDA for the management of 50 hotels with over 6,200 rooms throughout the country, many under construction and ready to open. Several other hotel chains had been eyeing the same deal, but AccorHotels won out, and will be bringing the Ibis Styles Mercure and Sofitel brands to the country in the next two to three years. With this one deal, AccorHotels have propelled themselves from 6th place in the rankings in 2015 to number one in 2016 (as a company) and the Ibis Styles brand also tops the table.

Our survey achieved a response rate of over 90%, with 36 of the 38 chains whom we approached contributing to the research by reporting their pipeline activity, totalling 365 hotels with 64,231 rooms. This is an increase of 29.2% on 2015’s reported pipeline activity of about 49,715 rooms in 270 hotels.

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>Rooms</td>
<td>Hotels</td>
<td>Rooms</td>
<td>Hotels</td>
<td>Rooms</td>
</tr>
<tr>
<td>North Africa</td>
<td>77</td>
<td>17,217</td>
<td>73</td>
<td>18,065</td>
<td>73</td>
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<tr>
<td>Sub-Saharan Africa</td>
<td>100</td>
<td>17,109</td>
<td>115</td>
<td>18,191</td>
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<tr>
<td>TOTAL</td>
<td>177</td>
<td>34,326</td>
<td>188</td>
<td>36,256</td>
<td>215</td>
</tr>
</tbody>
</table>
### Table 2: Hotel Chain Development Pipelines in Africa 2016 – Top 10 Countries by Number of Rooms

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Hotels</th>
<th>Rooms</th>
<th>Average Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nigeria</td>
<td>61</td>
<td>10,222</td>
<td>168</td>
</tr>
<tr>
<td>2</td>
<td>Angola</td>
<td>56</td>
<td>7,560</td>
<td>135</td>
</tr>
<tr>
<td>3</td>
<td>Egypt</td>
<td>19</td>
<td>6,660</td>
<td>351</td>
</tr>
<tr>
<td>4</td>
<td>Morocco</td>
<td>33</td>
<td>5,681</td>
<td>172</td>
</tr>
<tr>
<td>5</td>
<td>Algeria</td>
<td>15</td>
<td>3,263</td>
<td>218</td>
</tr>
<tr>
<td>6</td>
<td>Tunisia</td>
<td>15</td>
<td>2,976</td>
<td>198</td>
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<td>7</td>
<td>Kenya</td>
<td>16</td>
<td>2,956</td>
<td>185</td>
</tr>
<tr>
<td>8</td>
<td>Ethiopia</td>
<td>12</td>
<td>2,460</td>
<td>205</td>
</tr>
<tr>
<td>9</td>
<td>South Africa</td>
<td>11</td>
<td>2,058</td>
<td>187</td>
</tr>
<tr>
<td>10</td>
<td>Senegal</td>
<td>13</td>
<td>1,943</td>
<td>149</td>
</tr>
</tbody>
</table>

*Note: Average size refers to property size calculated by average number of rooms at each property.*
Nigeria remains the country with the most rooms in the chain’s pipelines. There are 20% more signed rooms there in 2016 than in 2015. Due to the AccorHotels deal, Angola, which has not previously appeared in the top 10, has displaced Egypt from second place.

Table 3 gives an analysis of the top 10 countries with the highest number of hotel rooms by pipeline status, and shows the change in ranking from 2016.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Countries</th>
<th>Hotels</th>
<th>Rooms Total</th>
<th>Onsite Construction</th>
<th>Rank – All Deals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Angola</td>
<td>56</td>
<td>7,560</td>
<td>6,778</td>
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</tr>
<tr>
<td>2</td>
<td>Egypt</td>
<td>19</td>
<td>6,660</td>
<td>5,517</td>
<td>3↑</td>
</tr>
<tr>
<td>3</td>
<td>Morocco</td>
<td>33</td>
<td>5,681</td>
<td>4,268</td>
<td>4↑</td>
</tr>
<tr>
<td>4</td>
<td>Nigeria</td>
<td>61</td>
<td>10,222</td>
<td>4,041</td>
<td>1↓</td>
</tr>
<tr>
<td>5</td>
<td>Algeria</td>
<td>15</td>
<td>3,263</td>
<td>2,720</td>
<td>5↔</td>
</tr>
<tr>
<td>6</td>
<td>Kenya</td>
<td>16</td>
<td>2,956</td>
<td>2,566</td>
<td>7↑</td>
</tr>
<tr>
<td>7</td>
<td>Ethiopia</td>
<td>12</td>
<td>2,460</td>
<td>1,843</td>
<td>8↑</td>
</tr>
<tr>
<td>8</td>
<td>Tunisia</td>
<td>15</td>
<td>2,976</td>
<td>1,726</td>
<td>6↓</td>
</tr>
<tr>
<td>9</td>
<td>Senegal</td>
<td>13</td>
<td>1,943</td>
<td>1,174</td>
<td>10↑</td>
</tr>
<tr>
<td>10</td>
<td>Rwanda</td>
<td>8</td>
<td>1,409</td>
<td>1,041</td>
<td>–</td>
</tr>
</tbody>
</table>
Angola is a unique case, with the highest performing pipeline in Africa. 90% of its pipeline activity is under construction, the majority being the AccorHotels deal. Kenya also has 90% of its pipeline under construction, an increase of about 150% on the 2015 figures. Nigeria, with the highest total number of rooms (over 10,000) has only 40% of the pipeline under construction, the lowest proportion of the top 10 countries. Whilst 32 of the 61 deals were signed in 2014 or more recently, and therefore can be expected still to be in planning, the ratio does highlight the challenges of getting a hotel project to start on site. In addition, some of the hotels “under construction” have been stalled for some time after work started, in one or two cases for several years.

Charts 2 and 3 show the top 10 cities by the number of planned rooms in Africa and in Sub-Saharan Africa.

**CHART 2. HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA 2016 – TOP 10 CITIES BY NUMBER OF PLANNED ROOMS**

In the whole of Africa, Lagos, the largest city on the continent, continues to lead the top 10 by the number of planned rooms, with over 4,000. Abuja, the capital of Nigeria, has the second highest number of planned rooms in the African pipeline, and together with Lagos accounts for 32% of the rooms in the top 10. Cairo was in 2nd place in 2015, but has been displaced to 6th place in 2016 – only three deals have been signed there since 2014. Nairobi jumps from 9th place in 2015 to 4th place in 2016 with 2,666 rooms, an increase of over 45%. Despite fears of oversupply (which may or may not happen), hotel chains and investors are still doing business there.

**CHART 3. HOTEL CHAIN DEVELOPMENT PIPELINES IN SUB-SAHARAN AFRICA 2016 – TOP 10 CITIES BY NUMBER OF PLANNED ROOMS**

Looking just at sub-Saharan Africa, Luanda, the capital of Angola, gets into the top five cities, after Lagos, Abuja, Nairobi, and Addis Ababa. Abidjan, arguably the most important city in Francophone West Africa, enters the ranking in 9th place, with more to come, as Côte d’Ivoire overtakes Nigeria as a potential investment destination, according to a recent survey.
Having analyzed where it is happening, or due to happen, we then look at who is making the running. The top 10 brands by number of hotels and rooms in their pipelines are shown in Table 4.

### Table 4: Hotel Chain Development Pipelines in Africa 2016 – Top 10 Brands by Number of Planned Hotels and Rooms

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
<th>Units</th>
<th>Hotels</th>
<th>Rooms</th>
<th>Change on 2015</th>
<th>Average Size (Rooms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ibis Styles</td>
<td>28</td>
<td>1</td>
<td>5,693</td>
<td>6%</td>
<td>228</td>
</tr>
<tr>
<td>2</td>
<td>Radisson Blu</td>
<td>25</td>
<td>2</td>
<td>4,851</td>
<td>-2%</td>
<td>303</td>
</tr>
<tr>
<td>3</td>
<td>Mercure</td>
<td>24</td>
<td>3</td>
<td>3,822</td>
<td>-</td>
<td>137</td>
</tr>
<tr>
<td>4</td>
<td>Hilton</td>
<td>16</td>
<td>4</td>
<td>2,919</td>
<td>26%</td>
<td>209</td>
</tr>
<tr>
<td>5=</td>
<td>Marriott</td>
<td>14</td>
<td>5</td>
<td>2,566</td>
<td>53%</td>
<td>183</td>
</tr>
<tr>
<td>5=</td>
<td>Hilton Garden Inn</td>
<td>14</td>
<td>6</td>
<td>2,526</td>
<td>606%</td>
<td>105</td>
</tr>
<tr>
<td>7=</td>
<td>Swiss Spirits</td>
<td>10</td>
<td>7</td>
<td>2,045</td>
<td>10%</td>
<td>227</td>
</tr>
<tr>
<td>7=</td>
<td>Golden Tulip</td>
<td>10</td>
<td>8</td>
<td>1,866</td>
<td>86%</td>
<td>267</td>
</tr>
<tr>
<td>9=</td>
<td>Sheraton</td>
<td>9</td>
<td>9</td>
<td>1,797</td>
<td>44%</td>
<td>200</td>
</tr>
<tr>
<td>9=</td>
<td>Four Points by Sheraton</td>
<td>9</td>
<td>10</td>
<td>1,412</td>
<td>109%</td>
<td>282</td>
</tr>
</tbody>
</table>

By number of hotels, Ibis Styles is ranked in 1st place, displacing the Hilton and Radisson Blu brands, which have competed with each other for 1st and 2nd place for many years. Mercure, another AccorHotels brand, is also in the top five. However, the average size of hotel in these two brands means that Radisson Blu and Hilton remain in the top two positions when measured by the number of rooms, which is ultimately the measure of future income potential.

Radisson Blu continues to occupy first place ranking by number of rooms, with 5,693 rooms in their pipeline, a small increase when compared to 2015, when there was a 25% increase in the brand’s pipeline. But as is often the case, one metric needs to be looked at in the context of another – Carlson Rezidor opened six Radisson Blu hotels in Africa in 2015, with 1,147 rooms, a greater number than any other brand. The pipeline for the Hilton core brand reduced slightly, with two openings in 2015 (c. 400 rooms), but there was much higher growth in their pipeline for the Hilton Garden Inn brand, now up to 14 hotels with 2,566 rooms. The Fairmont brand has experienced very strong growth, albeit from a small base, with a 109% increase in the number of rooms in 2016.

Table 5 presents the analysis of the brands according to pipeline status.

### Table 5: Hotel Chain Development Pipelines in Africa 2016 – Top 10 Brands by Pipeline Status

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brands</th>
<th>Hotels</th>
<th>Total</th>
<th>Onsite Construction</th>
<th>Rooms</th>
<th>Rank – All Deals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Radisson Blu</td>
<td>25</td>
<td>5,693</td>
<td>3,956</td>
<td>69.5%</td>
<td>1←→</td>
</tr>
<tr>
<td>2</td>
<td>Ibis Styles</td>
<td>28</td>
<td>3,822</td>
<td>3,822</td>
<td>100.0%</td>
<td>3↑</td>
</tr>
<tr>
<td>3</td>
<td>Hilton</td>
<td>16</td>
<td>4,851</td>
<td>3,380</td>
<td>69.7%</td>
<td>2↓</td>
</tr>
<tr>
<td>4</td>
<td>Mercure</td>
<td>24</td>
<td>2,526</td>
<td>2,526</td>
<td>100.0%</td>
<td>6↑</td>
</tr>
<tr>
<td>5</td>
<td>Marriott</td>
<td>14</td>
<td>2,919</td>
<td>2,049</td>
<td>70.2%</td>
<td>4↓</td>
</tr>
<tr>
<td>6</td>
<td>Hilton Garden Inn</td>
<td>14</td>
<td>2,566</td>
<td>1,231</td>
<td>48.0%</td>
<td>5↓</td>
</tr>
<tr>
<td>7</td>
<td>Sheraton</td>
<td>9</td>
<td>2,045</td>
<td>1,389</td>
<td>58.1%</td>
<td>7←→</td>
</tr>
<tr>
<td>8</td>
<td>Mövenpick</td>
<td>7</td>
<td>1,866</td>
<td>1,141</td>
<td>61.0%</td>
<td>8←→</td>
</tr>
<tr>
<td>9</td>
<td>Park Inn by Radisson</td>
<td>7</td>
<td>1,357</td>
<td>1,035</td>
<td>78.5%</td>
<td>-↑</td>
</tr>
<tr>
<td>10</td>
<td>Steigenberger</td>
<td>2</td>
<td>905</td>
<td>905</td>
<td>100.0%</td>
<td>-↑</td>
</tr>
</tbody>
</table>
Radisson Blu and Hilton, the traditional leaders in the survey, are joined by Accor-Hotel’s Ibis Styles and Mercure brands in the top four. All of AccorHotel’s Angolan hotels are under construction, and Steigenberger also has 100% of its pipeline, two large projects in Egypt, on site.

If those involved – the investors, the chains, the consultants and the lenders – can get these deals to fruition, the pipeline of the future, as shown in Table 6, will result in much-needed expansion of Africa’s hotel industry:

<table>
<thead>
<tr>
<th>Year</th>
<th>Hotels</th>
<th>Rooms</th>
<th>Cumulative New Rooms Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>119</td>
<td>16,934</td>
<td>–</td>
</tr>
<tr>
<td>2017</td>
<td>99</td>
<td>16,540</td>
<td>33,474</td>
</tr>
<tr>
<td>2018</td>
<td>75</td>
<td>13,920</td>
<td>47,394</td>
</tr>
<tr>
<td>2019</td>
<td>37</td>
<td>8,625</td>
<td>56,019</td>
</tr>
<tr>
<td>2020</td>
<td>22</td>
<td>4,989</td>
<td>61,008</td>
</tr>
<tr>
<td>2021</td>
<td>2</td>
<td>383</td>
<td>61,391</td>
</tr>
<tr>
<td>Not Known</td>
<td>10</td>
<td>2,840</td>
<td>64,231</td>
</tr>
</tbody>
</table>

The last row, 10 hotels with 2,840 rooms for which the opening date is “not known” reflects the uncertainty that is affecting Africa, particularly some of the North African countries – the chains just do not know when the hotels will open. As noted earlier, the countries in North Africa, particularly Libya and Egypt, have been affected by civil unrest and terrorism, and this has delayed work on a number of projects. Further, one of the sources of funding for projects in North Africa is the Middle East, where pockets have tightened because of the oil price crash.

However, the next three years will see the completion of over 47,000 new rooms in 293 new hotels, with a certainty that there will be more in deals yet to be done, and which have already been done in the first quarter of 2016.

Look beyond the problems that the continent is experiencing currently, problems that are being felt equally elsewhere in the world. Look at the growth story that is evident from these figures, and you can see that Africa is still rising! 🌟

Trevor Ward,
Managing Director,
W Hospitality Group
www.w-hospitalitygroup.com
In 2015, U.S. resident travel abroad increased to 73.9 million from 68.2 million in the year prior, which is an 8.4% rise. Out of the total number of U.S. travelers, 32.7 million traveled overseas* in 2015, with 8% visiting the Middle East and Africa. When we compare the origin (areas of residence) of all U.S. travelers going overseas to the origin of U.S. travelers specifically visiting Africa, there are some slight differences. In respect of all U.S. overseas travelers, the South Atlantic which extends from Virginia to Florida is the top origin market, and the second largest market is the Middle Atlantic, which includes New York, New Jersey, and Pennsylvania. These two regions combined make up the top U.S. origin market for all overseas travelers.

32.7 MILLION U.S. TRAVELERS OVERSEAS: MARKET SHARE FOR WORLD REGIONS VISITED IN 2015

- Latin America: 15%
- Caribbean: 23%
- Middle East & Africa: 8%
- Europe: 34%
- Asia/Pacific: 20%
Tourism Trends

All U.S. Travelers (Overseas)*
- South Atlantic (23%)
- Middle Atlantic (20%)
- Pacific (15%)
- West South Central (12%)
- East North Central (10%)
- New England (7%)
- West North Central (6%)
- Other (7%)

* Overseas excludes Canada and Mexico.

All U.S. Travelers (Africa) **
- South Atlantic (25%)
- Middle Atlantic (18%)
- Pacific (14%)
- West South Central (13%)
- East North Central (9%)
- West North Central (6%)
- New England (6%)
- Other 9%

** Estimates provided based on weighted 3-year sample to provide market share for each census region.

Source: National Travel & Tourism Office (NTTO), International Trade Administration, U.S. Department of Commerce.
Exploring Africa’s Historic, Cultural, and Artistic Diversity

While few experiences can replicate the exhilarating immersion and first-hand engagement with local culture that travel offers, the Metropolitan Museum of Art’s collection of African masterworks makes for an ideal first stop to spark the imagination and afford an unparalleled overview of the continent’s historic, cultural, and artistic diversity. The Met’s collection comprises over 29,000 works across the Departments of the Arts of Africa, Oceania, and the Americas and Egyptian Art, showcasing artistic traditions ranging from the archeological to the contemporary in this truly encyclopedic institution.

Among the Met’s landmarks is the monumental, three-thousand-year-old Egyptian Temple of Dendur, gifted to the United States by the Republic of Egypt in 1965, following the salvage of threatened sites and artifacts from the newly built Aswan Dam. The full collection of Egyptian artworks are housed in the Lila Acheson Wallace Galleries, specially designed to mirror the Michael C. Rockefeller Wing, both of which opened in 1982. A visit to the African galleries of the Rockefeller Wing offers one of the most comprehensive overviews of the continent’s cultures, including royal works of cast brass, ivory, and other masterpieces created in the Kingdom of Benin (modern Nigeria) between the 16th and 19th centuries; a superb collection of 18th and 19th century wood sculpture from Dogon and Bamana traditions of Mali; and illustrated medieval religious manuscripts and processional crosses from the rock-hewn churches of the Ethiopian highlands.

As part of its mandate to create more thorough understandings of the cultures of the world, the Met continues to pursue excellence in the presentation of African histories. Inspired by the acquisition of a 19th century nkisi n’kondi Mangaaka figure, the landmark exhibition *Kongo: Power and Majesty* (2015-16) explored 500 years of contact and interaction between Central Africa and Europe. *Ancient Egypt Transformed: The Middle Kingdom* (2015-16) brought to the forefront a transformational era in Egyptian history, drawing on decades-long archeological
Exploring Africa’s Historic, Cultural, and Artistic Diversity

excavations led by the Met itself. Past exhibitions have also included *Heroic Africans: Legendary Leaders, Iconic Sculptures* (2011) and *The Essential Art of African Textiles: Design without End* (2009). The Museum’s public programs further invite engagement with contemporary African culture through events featuring notable figures such as acclaimed Nigerian writer Chimamanda Ngozi Adichie, three-time Grammy award-winning Beninese singer/songwriter Angelique Kidjo, and renowned Ghanaian artist El Anatsui.

Contemporary travel and tourism mostly introduce one to the culture of the day. Visits to the Met, however, provide a broader-range, contextual view of history and society through works that have been – and continue to be – greatly influential in the art world globally. Indeed, many of the works on display in the Michael C. Rockefeller Wing were a source of inspiration to European and American artists from the early 20th century into the present. It is our hope that the growing international spotlight on Africa will also spark greater interest in the dynamic histories of the region and the cultural achievements of its brilliant talent. We hope to encourage this rediscovery by introducing the general public to Africa’s heritage, right here in New York City.

Alisa LaGamma, Ph.D., Ceil and Michael E. Pulitzer Curator in Charge, Department of the Arts of Africa, Oceania, and the Americas, The Metropolitan Museum of Art
www.metmuseum.org
Cultivating African Culinary Tourism Products and Trade

New forms of tourism have developed over the past years as a growing number of travelers are looking for deeper cultural experiences. Consequently, the traditional forms of tourism like seaside holidays and safaris are gradually ceding room to a more culture-centered approach to traveling. Food is at the heart of this cultural experience. Food is the biggest tourist draw of all the cultural tourism experiences such as museums, galleries, pilgrimage sites, and festivals. According to a 2013 report from Mandala Research, 77% of all American leisure travelers are culinary travelers. This trend is a global phenomenon, not limited to Americans. Over one-third of tourist spending is devoted to food.

Indeed, culinary tourism is the fastest-growing niche in the industry. People are traveling in search of special cuisines and exotic flavors. In this quest to connect with the destination’s culture, travelers find in food an intimate glimpse into a culture. Food offers an authentic experience because it is deeply connected with the product of the land, its environment, and its traditions.

The product is the foundation of food tourism; it is essential that it identifies with the land of origin. Culinary tourism in Africa begins with popularizing cuisines in the West. I have spent my entire career trying to do precisely that as a chef and author. Now, I’m trying to take that further by introducing some of Africa’s key ingredients – Africa’s hidden culinary gems – to Western consumers.

Across the U.S., on a large scale, diners are hungry for new flavors and traditions. In city after city, restaurateurs are opening platforms for experiencing street foods from across the globe. Yet, Africa is not well represented, but an undercurrent of data suggests that Africa’s exciting and distinctive flavors are poised to seize the American imagination.

In the course of exploring this opportunity with trading partners who have made this happen with ingredients from other regions, I have learned that doing so is a complex, multi-step process that requires cooperation across all sectors: Governments, NGOs, and industry. In order to promote Africa’s food, we need to center product development and marketing accordingly.

Building the Fonio Industry

Fonio is a traditional West African grain that addresses several market demand issues. It is a gluten-free whole grain that cooks up like couscous, instantly, but with vastly superior nutritional properties. Fonio should be the next quinoa - a grain capable of transforming the economy in its traditional growing areas.

Yet, in order to make such a feat possible, investments need to be made on the ground. Inexpensive African-made decorticating machines are capable of increasing a village’s fonio output by a factor of 50 or 100. Industrial washers can similarly open up the production bottleneck posed by the current practice of manual washing. Prefabricated buildings will allow production facilities to meet the quality standards required by large volume manufacturers, retailers, and food service operators. Training in best manufacturing practices is another requirement for export-quality products. Similarly, roads must be improved so that reliable transport is no longer an obstacle. These investments are essential.
to making fonio and other West African ingredients exportable.

Creating Authentic Culinary Experiences

There are several ways of offering authentic learning experiences to tourists. Organizing events like AfroEats, the food festival that I co-organized in Dakar in May 2013, is one concrete way to attract groups of travelers. The principal goal was to introduce West African food products to the world. Over 5 days, hundreds of Dakar foodies and visitors mingled with chefs, food producers, and nutritionists around workshops, food tastings, and cooking demos.

In 2017, I am collaborating with a Boston University team to organize an Institute/Culinary Tour in Senegal. The program is designed to take a dozen American foodies for a complete local food experience. Activities will include a day in the charming village of Djilor, located by the quiet Delta of the Sine River, to visit peanut and millet fields; spending time with a group of local women who run a cooperative that specializes in the processing of millet into couscous; learning how to prepare “Thiére Mboun,” the local specialty of millet couscous with peanut sauce and freshly caught fish.

At sunset, by the beach, in the nearby village of Joal (Senegal’s largest traditional fishing port), the group will watch the salting and smoking of “kethiakh” (the local sardine-like fish). The group will spend time with salt harvesters at the Pink Lake. The Pink Lake is one of Senegal’s most popular tourist destinations because of its high salt content water that turns a bright pink color during the dry season.

When in Dakar, we will bargain our way around the colorful food stalls of the capital’s markets.

Most importantly, our group will have the ultimate food immersion experience – a Senegalese meal in a local family home. We will share Senegal’s national dish Thiebou Djenn, sitting around the bowl with our host families. This will be a perfect opportunity to experience Teranga, the legendary Senegalese sense of hospitality, where the guest is always king. Of course, no meal is complete in Senegal without Ataya, the traditional tea ritual consisting of small shots of green tea served in a sequence from the stronger, to the mild, and to the mint-flavored sweet.

We must market the truly unique aspects of African traditional cuisines while raising the quality of processing our food products to international standards. In doing so, food tourism will not only contribute to promoting a sense of respect for one’s culture; but it will also generate income and job opportunities, while developing other sectors of the local economy such as agriculture and the environment.

The time has come for African cuisine.

Chef Pierre Thiam,
Author of “Senegal: Modern Senegalese Recipes from the Source to the Bowl” and “Yolele! Recipes From the Heart of Senegal”
www.pierrethiam.com
Mindfulness in the Wilderness: Africa’s Wellness Travel Products

Africa continues to see solid tourism growth in key performance areas, as evidenced by the predicted increases in arrivals for 2016, out-performing lodging, and GDP. Airlines and lodging are experiencing stronger growth than in past years, with South Africa, Kenya, and Nigeria being major markets for both.

A new trend, which has been spurred by travelers’ concern with health and wellness while seeking unique and authentic experiences, is resulting in a demand for spiritual travel with an adventure component. The Global Wellness Summit found that in 2014, wellness travel (travel with a purpose of improving health and well-being) was growing 74% more than regular global travel.

According to Euromonitor International, in Africa the wellness travel trend has been seen in a rise in the concept of “wellness in the wilderness,” where a traditional safari break is accompanied by meditation, yoga, and spa services. Typically, consumers of these types of breaks are relatively older and wealthy holidaymakers, often female, who are looking for more than just a typical African getaway. One aim for many clients is to gain life-enhancing skills through mindful activities that can be applied to everyday life, offering a richer holiday experience.

Resorts such as Kenya-based Campiya Kanzi offer a luxury eco-lodge including yoga classes and meditation in the middle of the savannah at sunset. Karkloof, situated within a 3,500-hectare game reserve in Kwa Zulu Natal in South Africa, combines therapeutic spa treatments with a safari experience. The vast majority of mindful safaris are in South Africa or Kenya, but destinations such as Botswana and Tanzania could offer differing attractions such as watching animal migrations. Other locations and activities that could match well with mindfulness holidays include exploring flora and fauna in South America, or Canada’s wild nature offering.
Wellness Travel Products

While current consumers are mainly international leisure holidaymakers, there is much scope to develop for business and leisure or “bleisure” tourists, as well as diaspora and regional visitors. Links with schools who are increasingly using mindfulness to assist students with their busy lives could also prove a successful future direction for these types of holidays.

Time spent with loved ones, including oneself, was consistently ranked as most important by respondents in Euromonitor Global Consumer Trends Survey in 2015. Time is becoming crucial in a world where everything moves fast, so a safari in the middle of nowhere with loved ones is the ultimate form of wellness travel.

Euromonitor International
www.euromonitor.com
Developing Africa’s Medical

For medical tourism to grow in Africa, some major obstacles need to be overcome. Research studies show that perceptions of crime and security are major factors that inhibit tourists from visiting the continent, while contracting HIV at work is a major fear of African health care providers. Collectively, these negative factors are also driving the “brain drain” of African health care professionals to Europe and North America.

The table below shows the disparity in the health workforce for five African countries and compares Africa as a whole to Europe, the Americas, and the world:

<table>
<thead>
<tr>
<th>Country</th>
<th>Physicians</th>
<th>Nurses/Midwives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberia</td>
<td>0.1</td>
<td>1.4</td>
</tr>
<tr>
<td>Malawi</td>
<td>0.2</td>
<td>3.4</td>
</tr>
<tr>
<td>Mozambique</td>
<td>0.4</td>
<td>4.1</td>
</tr>
<tr>
<td>South Africa</td>
<td>7.8</td>
<td>51.1</td>
</tr>
<tr>
<td>Seychelles</td>
<td>10.7</td>
<td>48.1</td>
</tr>
<tr>
<td>Algeria</td>
<td>12.1</td>
<td>19.5</td>
</tr>
<tr>
<td>Africa</td>
<td>2.7</td>
<td>12.4</td>
</tr>
<tr>
<td>Americas</td>
<td>21.5</td>
<td>44.9</td>
</tr>
<tr>
<td>Europe</td>
<td>32.1</td>
<td>80.2</td>
</tr>
<tr>
<td>Global</td>
<td>13.9</td>
<td>28.6</td>
</tr>
</tbody>
</table>


According to the International Medical Travel Journal, global medical tourism has been static at around 7 million people for five years and shows no signs of growth. However, what is changing rapidly is each country’s share of the total. Domestic medical tourism is increasing and accounts for 3 million people, while health and wellness tourism accounts for 50 million people and is growing each year.

Estimates on the number of medical travelers and tourists to Africa vary widely, which reflects the reality that there is an absence of reliable, up-to-date data on the size and potential of this niche tourism sector.
Tourism Potential

A 2012 study by the Southern Africa Migration Program (SAMP), shows that intra-African travel for medical treatment far exceeds that of international inbound medical tourists from Europe and North America. Medical migrants from other African countries to South Africa increased from 327,000 in 2006 to over 500,000 in 2009. By comparison, medical travelers from the Northern hemisphere generated 281,000 visitors. The study benchmarks a price comparison in U.S. dollars for a range of medical procedures in South Africa against the U.S. and compares these to Mexico, Thailand, Croatia, and India. The comparison shows that while South Africa is more cost competitive than the U.S., it is more expensive than its competitor destinations across all medical procedures.

A report from Johannesburg Tourism, estimates revenue generated by medical tourism to South Africa in 2013 at R9.8 billion, and indicates the average spend per health traveler at R60,000. Medical visitors contribute to Johannesburg’s economy through visiting hospitals and medical professionals, seeking accommodation, transport and retail, as well as tourism products and medical insurance. Friends and relatives who visit also contribute to Johannesburg’s tourism economy by staying in hotels, taking advantage of Joburg’s many lifestyle products and visiting the city’s attractions.

The potential for tourism entrepreneurs to tap into the medical tourism niche lies in Government regulations that prohibit doctors and specialist surgeons from directly attracting international patients. For example, South African physicians are not allowed to market or advertise their services, to have a photograph of themselves on their website, or to make claims about the quality of their work. They also cannot accept payment for referring a patient to a hotel or travel agent.

These inhibiting regulations provide an opportunity for entrepreneurs to establish facilitation or intermediary services between patients, doctors/surgeons, and the private medical hospitals and clinics. These services could include pre-trip consultations in the patient’s home country, connecting prospective patients with African health facilities and surgeons, preparing cost estimates, organizing flights and accommodation, and arranging post-surgery tours and activities, such as safaris.

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