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The African Development Bank (AfDB) is pleased to present the first Africa Tourism Monitor, produced in partnership with New York University Africa House and the Africa Travel Association (ATA). We hope this will be the beginning of even greater collaboration in our efforts to increase information and awareness about the tourism sector in Africa.

Africa is presently home to some of the fastest-growing economies in the world, with several countries experiencing growth rates of 7% per year or higher. This is particularly noteworthy given the overall economic slowdown in other developing and emerging regions of the world.

The tourism industry constitutes an important pillar in the realization of Africa’s economic potential. The revenues from tourism in Africa represent more than double the total given in donor aid. To make African tourism more inclusive and beneficial to all segments of the population, corporate and government practice must change. While high growth has been achieved and sustained even in the aftermath of the global financial crisis, Africa’s challenge now is to embark on inclusive and green growth. In this regard, tourism can make an important contribution, given Africa’s abundant natural beauty and rich cultural heritage. Tourism, as an employment-intensive sector, cuts across a spectrum of skills, as well as creating opportunities for greater regional trade and integration. Tourism has the capacity to contribute significantly to the agenda for social inclusion, as cultural endowments and natural assets can be leveraged to create opportunities for local communities. The abundant natural resources can also be harnessed for a transition to green growth.

So far, the potential of Africa’s tourism is far from tapped—while Africa accounts for about 15% of the world population, it receives only about 3% of world tourism receipts and 5% of tourist arrivals. To maximize Africa’s tourism potential, critical investments are needed in key infrastructure sectors (e.g., transport, energy, water and telecommunications). Indeed, one priority area for the African Development Bank is the promotion of tourism through the development of cross-border infrastructure. The AfDB has strongly supported investment in regional transport corridors, which can stimulate intra-regional and global trade as well as foster intra-African tourism.

Tremendous opportunities also exist for expanded intra-African tourism and travel by reducing barriers to the movement of people. In this respect, it is significant that on average, African citizens require visas to visit 60% of African countries. Loosening of visa restrictions would go a long way towards boosting business and leisure traveler flows, thereby contributing to the economic and social development of local economies and communities.

In 2012, the AfDB produced the Rio+20 discussion paper on “Facilitating Green Growth in Africa.” The green growth model provides a pathway for achieving growth targets and development objectives in a more efficient, sustainable and resilient manner. The underlying connection between tourism and the natural environment provides ample opportunity to foster Green Growth in Africa. This can be achieved in part through the promotion of eco-tourism, the conservation of wildlife, and protection of the continent’s natural habitats. In this way, Africa’s unique natural endowments will benefit local communities and be appreciated by tourists from within and outside the continent for decades to come.

Professor Mthuli Ncube, Chief Economist & Vice President, African Development Bank Group
Welcome to the first issue of Africa Tourism Monitor, a joint publication of the African Development Bank (AfDB), Africa House at New York University, and the Africa Travel Association (ATA). This report is inspired by the first two issues of State of Tourism in Africa, which were prepared with our partners at the World Bank, who have also contributed content to this report.

This report presents some of the major opportunities and challenges facing the diversification of the travel and tourism industry in Africa – from generating revenue and creating jobs to attracting new travel and tourism markets; from developing niche tourism products to sustaining hotel and airline growth; and from leveraging social media to utilizing on-line travel engines.

The facts, figures, commentaries and case studies in this issue show how travel and tourism stakeholders across Africa and around the world are taking an innovative approach to growing and sustaining the industry.

We would like to thank all of our partners who contributed to this issue. We look forward to continuing to work with you as we aim to make a clear and compelling case for investment and spending in Africa’s tourism sector. Together, we can ensure that Africa is both benefiting from and participating in one of the world’s fastest growing and changing sectors.

Professor Yaw Nyarko
Director, Africa House
New York University

Edward Bergman
Executive Director
Africa Travel Association

Sources: United Nations World Tourism Organization (UNWTO) and The World Travel and Tourism Council (WTTC)
Africa Tourism: the Numbers

According to the United Nations World Tourism Organization (UNWTO), worldwide arrivals in 2012 exceeded the 1 billion mark for the first time in history with 1.032 billion tourists crossing borders and staying overnight, up from 995 million in 2011. Many of these visitors arrived from emerging markets in Asia, Africa, Central and Eastern Europe that lead growth in tourism demand.

While Europe continues to be the most popular destination worldwide, Asia and the Pacific recorded the strongest growth in arrivals, followed by Africa. In fact, in 2012, Africa recovered well from its setback of the previous year when arrivals declined, largely due to a reduction in tourists traveling to North Africa. Whereas Africa attracted just 17.4 million international visitors in 1990, this rose to 63.6 million in 2012.

### Tourist Arrivals and Receipts in Africa by Region (2011)

<table>
<thead>
<tr>
<th>REGION</th>
<th>TOTAL TOURIST ARRIVALS</th>
<th>TOTAL LONG HAUL ARRIVALS</th>
<th>RECEIPTS US$M</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Africa</td>
<td>26,554,000</td>
<td>24,383,000</td>
<td>$ 18,296</td>
</tr>
<tr>
<td>Southern Africa</td>
<td>11,048,000</td>
<td>2,599,000</td>
<td>$ 10,090</td>
</tr>
<tr>
<td>East Africa</td>
<td>7,621,000</td>
<td>2,727,000</td>
<td>$ 7,596</td>
</tr>
<tr>
<td>West Africa</td>
<td>6,611,000</td>
<td>4,838,000</td>
<td>$ 3,412</td>
</tr>
<tr>
<td>Central Africa</td>
<td>667,000</td>
<td>475,000</td>
<td>$ 674</td>
</tr>
<tr>
<td>Total</td>
<td>52,501,000</td>
<td>35,022,000</td>
<td>$ 40,068</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>10,958</td>
<td>10,755</td>
<td>12,528</td>
<td>8,707</td>
<td>9,940</td>
</tr>
<tr>
<td>South Africa</td>
<td>7,925</td>
<td>7,545</td>
<td>9,070</td>
<td>9,547</td>
<td>9,994</td>
</tr>
<tr>
<td>Morocco</td>
<td>7,168</td>
<td>6,557</td>
<td>6,703</td>
<td>7,281</td>
<td>6,711</td>
</tr>
<tr>
<td>Tunisia</td>
<td>2,953</td>
<td>2,775</td>
<td>2,645</td>
<td>1,914</td>
<td>2,183</td>
</tr>
<tr>
<td>Tanzania</td>
<td>1,289</td>
<td>1,160</td>
<td>1,255</td>
<td>1,353</td>
<td>1,564</td>
</tr>
<tr>
<td>Mauritius</td>
<td>1,449</td>
<td>1,117</td>
<td>1,282</td>
<td>1,488</td>
<td>1,477</td>
</tr>
</tbody>
</table>

**SOURCE:** UNWTO

### International Tourist Arrivals (2012)

<table>
<thead>
<tr>
<th>SUB-REGION</th>
<th>MILLIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>534.2</td>
</tr>
<tr>
<td>Asia &amp; The Pacific</td>
<td>233.6</td>
</tr>
<tr>
<td>North America</td>
<td>106.7</td>
</tr>
<tr>
<td>Caribbean</td>
<td>20.9</td>
</tr>
<tr>
<td>South America</td>
<td>26.7</td>
</tr>
<tr>
<td>Africa</td>
<td>63.6</td>
</tr>
<tr>
<td>Middle East</td>
<td>40.8</td>
</tr>
<tr>
<td>World</td>
<td>1,035.0</td>
</tr>
</tbody>
</table>

**SOURCE:** UNWTO Tourism Highlights, 2013
## Africa Tourism: the Numbers

*Fastest-growing destinations by arrivals*

Arrivals estimated % change between 2010 and 2011

### Fastest-Growing Destinations

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>2005</th>
<th>2008</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Congo, Dem. Rep.</td>
<td>129.6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Togo</td>
<td>48.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Sierra Leone</td>
<td>33.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Cape Verde</td>
<td>27.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Eritrea</td>
<td>27.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Uganda</td>
<td>21.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Gambia, The</td>
<td>16.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Algeria</td>
<td>15.7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Madagascar</td>
<td>14.8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Angola</td>
<td>13.2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


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**AFRICA TOURISM DATA PORTAL**

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](http://www.tourismdataforafrica.org)
The Role of Tourism in Expanding Economic Opportunities for Youth

The growth in tourism goes hand-in-hand with a growth in hotels, restaurants and retail outlets, as well as transport and entertainment. This, in turn, creates new jobs, services and products. In this way, tourism can promote inclusive growth for marginal segments of the population, such as women, rural populations, and youth.

According to the African Development Bank (AfDB), Africa is the world’s youngest continent with close to 70% of its population aged below 25. Youth constitute about 37% of the total labor force, but make up about 60% of total unemployment. If Africa continues to invest in education and training to develop the potential of its youth, it can turn this challenge into an opportunity, particularly when skills development goes hand in hand with incentives to employ them.

Here are some positive examples of how tourism can create economic opportunities for youth across the African continent:

- The Serena Hotels Group is committed to supporting the youth of the local communities via the provision of career, leisure, educational and training opportunities. In April 2013, Kampala Serena Hotel invited students from selected hospitality colleges in Uganda to attend a hospitality skills training course run by Lobster Ink, which is conducting professional skills training at all Serena City Hotels in Africa.

- Starwood Hotels & Resorts Worldwide, Inc. and nine other global companies have joined The Global Travel & Tourism Partnership (GTTP) initiative to introduce secondary school students to career opportunities in travel and tourism in Africa. GTTP Kenya is in schools throughout the country, and GTTP Tanzania is in the pilot stage. GTTP South Africa’s curriculum is now part of the national curriculum. Other global supporters include Amadeus, American Express, Carlson Wagonlit Travel, Enterprise Holdings, Hertz, HRG, KDS, Lufthansa, and Travelport. Worldwide GTTP serves about 450,000 students annually.
ADVENTURE TOURISM ON THE RISE

The Adventure Travel Trade Association (ATTA) reports in its Adventure Tourism Market Study of August 2012 that the global adventure tourism market is worth $263 billion annually, which is a massive increase since 2009, when it was worth US$89 billion. It also highlights that 42% of travelers from three regions (North America, Europe and South America) have taken at least one adventure tourism trip in the last year. Of those, over 70% plan to incorporate adventure into their next trip.

Not only is this market growing, but attracting the adventure traveler is also key to qualitative regional tourism growth – these individuals stay in destinations longer (9-10 days on average), spend more money, and more of their spending remains in the local community.

Adventure travelers are more likely to use professional services such as guides, instructors, tour operators, or other services. They tend to seek diverse and novel activities when they travel, so to attract them back, operators and destinations may need to offer multiple adventure activities.

The ATTA has been expanding its ties with adventure in Africa, including hiring an Executive Director of the Middle East and North Africa, and by choosing the country of Namibia to host its 10th annual Adventure Travel World Summit in October 2013.

Shannon Stowell, President, Adventure Travel Trade Association
http://www.adventuretravel.biz/
DEVELOPING A FOOD TOURISM STRATEGY

100% of travelers must eat. Not everyone goes to museums or plays golf, but everyone eats. We can send visitors home with memories of international burger and coffee chains, or we can send them home with eating experiences unique to the region they are exploring.

While Africa is very well known for its safari and wilderness attractions, including a food tourism component has the potential to create an economic advantage for African businesses and destinations. Since travelers must eat and drink in every destination they visit, we know that creating a food and/or drink tourism strategy is prudent. It can help to build a competitive advantage or unique selling proposition in relation to other businesses or destinations.

According to research conducted by the World Food Travel Association (WFTA) in 2012, the added value of a food tourism strategy to destination marketing plans and business offerings can increase visitor arrivals, increase sales and revenue, attract media interest, increase community engagement and boost the livelihoods of the local population.

- WFTA research shows that only 8.1% of people self-identify as “gourmet foodies”. This means that the overwhelming majority of foodie travelers just like great food and drink – it doesn’t have to be expensive.
- WFTA research shows that the majority of foodie travelers are on average aged between 20 and 55. They tend to be better educated, and not necessarily wealthier than other travelers.

Erik Wolf, Executive Director and Founder, World Food Travel Association (WFTA) www.WorldFoodTravel.org.

AFROEATS, A NEW INTERNATIONAL AFRICAN FOOD FESTIVAL

The Senegalese city of Dakar hosted AfroEats, the new international festival of African cuisine and agriculture from April 30 to May 6, 2013. Bringing international chefs, nutritionists and food entrepreneurs together at the “African table,” AfroEats was conceived by Senegalese-born and New York-based chef Pierre Thiam, in cooperation with the Senegalese Ministry of Commerce and DKR-NXT, a design firm in Senegal.

Through workshops, tastings, demos and a culinary tour of the origins of the local cuisine, chefs and other visitors from the U.S., France and Mexico, as well as from Burkina Faso, Togo, Cameroon, and the Ivory Coast, explored the complexity of Senegalese and other cuisines of the continent. The chefs were invited to take a fresh look at the cuisines of Africa so that they could carry the experience and fruits of AfroEats back to their own kitchens.

The event was held at the “Grand Theatre National,” where a public food exposition was set up. Under giant tents, close to one hundred agro-industry entrepreneurs presented an array of African food products such as vegetarian cashew skewers, fonio bread, hibiscus liquor or the creamy goat cheese prepared by monks from the local monastery of Keur Moussa. The festival ended with the chefs preparing a banquet for the public, using only local ingredients. Featured dishes included smoked catfish, sweet potato leaves with ground peanut stew over millet couscous, rice cakes with baobab fruit and hibiscus coulis.
WHAT IT TAKES TO BE A SUSTAINABLE DESTINATION

Destination sustainability is a concern, to travelers and to travel and tourism corporations looking to manage risks and make informed investment decisions. Sustainable Travel International has been working with destinations around the world since 2002. As a result of our work, which spans more than 70 countries and 160 destinations, we have developed a clear idea of what it means to be a sustainable destination in today’s industry.

- Sustainable destinations have achieved balance, managing the long-term economic needs of residents with the short and medium term needs of businesses.
- Sustainable destinations are managed by well-trained and committed staff. They have an up-to-date tourism plan and policy frameworks which focus on sustainable tourism as the driver of tourism development.
- Sustainable destinations reinvest the profits from their tourism activities in environmental conservation, historic restoration, and preservation of cultural heritage.
- Sustainable destinations are internationally recognized, valued by tourists for their overall quality, and receive increasing value from tourist stays.

Recognizing the common challenges and opportunities destination managers face, Sustainable Travel International has established a network to help senior-level tourism leaders transform the travel industry by fostering sustainable tourism at a global scale.

The Sustainable Destination Leadership Network is the world’s first network of its kind. Participation provides partner destinations with access to the latest sustainability strategies, research, and best practices, through a host of valuable benefits and meaningful collaboration between SDLN participants.

RURAL TOURISM GROWTH

Pearls of Uganda is a tourism initiative developed in partnership between Solimar International and the Uganda Community Tourism Association (UCOTA). This initiative is based on the following four-step approach to rural tourism growth in western Uganda:

1. Analyzing the tourism product opportunities and the market needs/concerns in the region;
2. Reacting to the market needs/concerns by improving the skills and business acumen of community tourism operators as well as improving their product offer;
3. In parallel, working with national tour operators, hotels and lodges to become ‘Pearls Supporters,’ agreeing to sell and support the products under the Pearls of Uganda brand as long as they meet the agreed standards and reliability;
4. Finally, incentivizing the national tourism trade through marketing to international tour operators and travelers to drive visitation to the communities and the businesses that engaged with the program.

PROGRAM RESULTS (IN 3 YEARS)

<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of community tourism enterprises supported</td>
<td>40+</td>
</tr>
<tr>
<td>% increase in revenues for target community enterprises</td>
<td>60%</td>
</tr>
<tr>
<td>% increase in household income for target communities</td>
<td>27%</td>
</tr>
</tbody>
</table>

Simon Jones, Vice President, Solimar International
www.PearlsOfUganda.org

PHOTO COURTESY OF AFRICA ADVENTURE CONSULTANTS
Families are today’s fastest growing leisure market segment in the U.S., with 44% of all leisure travelers bringing children along on their trips. About 115 million trips per year included children and Virtuoso ranks family and multigenerational travel as their top business trend. Major tour companies such as Tauck, Collette Vacations, Africa Adventure Consultants and AdventureSmith Explorations are seeing double-digit growth in family bookings. 40% of families plan their vacations with an educational component in mind. Many of these family travelers are interested in wildlife, history and culture – all of which are found in abundance in Africa. 

Family travel accounts for 33% of the $150 billion U.S. online travel market bookings. Recent research finds that the “intent to splurge on travel” is returning, and it’s greater among travelers with children. The “Digital Elite” who use smartphones and tablets travel considerably more than other travelers. Families comprise 50% of these travelers and they are more likely to travel internationally than others.

Multigenerational travel is a huge industry growth opportunity for Africa. 40% of all leisure travelers from the U.S. have taken at least one multigenerational trip over the last twelve months. This percentage is even greater among families with household incomes of $125,000+. 25% of all leisure travelers are grandparents and 37% traveled with their grandchildren in the last year. Importantly, 67% of grandparents say that children are never too old to be treated to a family vacation.

In their study of the multigenerational travel market, Preferred Hotel Group called it “one of the hottest trends in travel,” with 15% of multigenerational travelers indicating an interest in visiting Africa in the next two years. Healthier and wealthier Baby Boomers are retiring and have the time and the disposable income for family travel. Over the next 18 years, 77 million Americans will turn 65. International travel and “bucket list” destinations, including safaris and culturally-oriented trips, are especially popular with this group. Large tour companies, like Abercrombie & Kent and Africa Adventure Consultants, are also reporting strong interest in multigenerational travel to Africa, which brings to mind the kinds of enriching experiences multigenerational travelers are seeking. 

Nancy Schretter,
Managing Editor,
Family Travel Network
http://www.familytravelnetwork.com/

As this niche market continues to gain momentum for American visitors traveling to Africa, it also presents a dynamic view of product development for intra-Africa travel.
TAPPING THE DIASPORA IN DEVELOPING TOURISM MARKETS & PRODUCTS

For emerging economies, tapping into the Diaspora is frequently hailed as a path for development. For tourism, the Diaspora can fulfill both supply and demand roles. Members of the Diaspora returning to their countries of origin are seen as a motivated source market, while development of Diaspora-related sites and attractions is seen as an opportunity for product development and value-added differentiation. Yet there is uneven success in this pursuit. What does it take to develop this market and tourism products? Lessons learned from the role of the Diaspora in general, applied to tourism, provide clues to cracking this market.

The Diaspora makes positive contributions through a variety of areas including: economic (remittances, investments, exports); intellectual (skills, know-how, knowledge networks); social (building up civil society); philanthropy (charity and donations); political (lobbying, advocacy, mediation); and cultural (exchanges and documentation). Tourism is a key area for collaboration as it can be a vehicle for each of these areas. Yet there is still a wide gap between the promise and delivery of Diaspora contributions.

A key lesson learned is that Diaspora initiatives are easy to start but difficult to maintain momentum. For effective and concrete results to materialize, it is critical to first “know your Diaspora” beyond anecdotal insights and to identify specific goals aligned with the Diaspora 1,2.

2 Adapted from GFMD (2009) Athens background paper session 1.2 -Roundtable 1 and Migration Policy Institute (2009)

Simply doing “good” or “right” is not enough to build lasting business.

Successful engagement of the Diaspora also requires commitment from both the public and private sectors—in origin and host markets. Experience has found there to often be a disconnect between intentions to develop a Diaspora policy and concrete policy initiatives by governments on the one hand, and limited trust between stakeholders on the other. Addressing these issues in efforts that mobilize all stakeholders is the underpinning for success.

Going forward, for viable development of diaspora tourism—as for all Diaspora initiatives—four priorities are to:
• Generate and share better information on Diaspora communities
• Enable active cooperation between origin and host countries
• Secure support by countries of origin to establishing an enabling environment for Diaspora engagement
• Consistently interface with stakeholders and government at all levels—central, provincial regional, municipality and community.

Dr. Hannah R. Messerli,
Private Sector Development/Tourism, Africa Region (AFTFP), The World Bank Group

IMPACT OF VISA RESTRICTIONS ON THE TOURISM SECTOR

Visa restrictions have broad economic consequences, notably for the tourism sector. Prior to 2013, Mauritius required visitors to apply for visas before arriving, while Seychelles does not require entry visas at all – this has led to a high gap in tourist growth. The number of tourists to Seychelles has grown by 7% per annum in the last five years while Mauritius has remained almost stagnant. As a result, the Mauritian Government is trying to boost tourism by relaxing visa regimes for 30 African countries and 75 countries overall.

Beyond tourism, visa requirements imply missed economic opportunities for intra-regional trade, and the local service economy (such as cross-country medical services or education). Improving visa facilitation could generate an additional US$206 billion for the tourism sector alone, and create as many as 5.1 million new jobs by 2015 in the G20 countries (WEF, 2013). Tourist arrivals in Africa will grow at double the pace compared to advanced-economy destinations. The tourism industry represents 3% of global employment. With indirect employment included, tourism contributes to around one in every 11 jobs worldwide. The industry is expected to grow at a pace of 3.3% per year. By 2015, destinations in the global South would have surpassed those in the global North. Visa policies are among the most important governmental formalities negatively influencing international tourism.

Africa’s Air Routes: Increasing Destination Access

With a rise in the number of arrivals, Africa is one of the fastest-growing airline markets in the world. Air access is becoming increasingly competitive with airlines from the United States, Europe, Africa and the Middle East expanding operations across the continent.

NOTABLE HIGHLIGHTS INCLUDE:

- Delta Air Lines is the largest airline operating to Africa from the United States, capturing 36% of all U.S.-Africa flights in September 2013. South African Airways is the second largest trans-Atlantic carrier to Africa.

- Carriers from the Persian Gulf building routes to Africa include Qatar Airways, Dubai-based Emirates and Abu Dhabi’s Etihad Airways.

- According to the International Air Transportation Association (IATA), the Middle East and Africa led passenger growth in July 2013, with traffic up 7.8% and 7.5% respectively, compared to one year previously, far outpacing air traffic in other regions.

INTERNATIONAL ARRIVALS

Arrivals in emerging countries are expected to surpass those in advanced economies by 2015.

<table>
<thead>
<tr>
<th>YEAR ON YEAR COMPARISON</th>
<th>JULY 2013 VS JULY 2012</th>
<th>YTD 2013 VS YTD 2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RPK</td>
<td>ASK</td>
</tr>
<tr>
<td>Africa (International)</td>
<td>7.5%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Africa (Domestic)</td>
<td>7.2%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

YTD: Year to Date
RPK: Revenue Passenger Kilometers measures actual passenger traffic
ASK: Available Seat Kilometers measures available passenger capacity
PLF: Passenger Load Factor is % of ASKs used.

SOURCE: Air Passenger Market Analysis, IATA, July 2013
Examples of airlines from the U.S., Europe and Africa expanding operations across Africa.

Arik
arikair.com
Arik Air
8 destinations in Africa
Accra, Ghana, Luanda, Angola, Douala, Cameroon, Kinshasa, Democratic Republic of Congo, Banjul, The Gambia, Dakar, Senegal, Freetown, Sierra Leone, Johannesburg, South Africa

Brussels Airlines
20 destinations in Africa
Luanda, Angola, Cotonou, Benin, Ouagadougou, Burkina Faso, Bujumbura, Burundi, Douala, Cameroon, Yaoundé, Cameroon, Kinshasa, Democratic Republic of Congo, Cairo, Egypt, Luxor, Egypt, Addis Ababa, Ethiopia, Banjul, Gambia, Conakry, Guinea, Abidjan, Ivory Coast, Nairobi, Kenya, Monrovia, Liberia, Agadir, Morocco, Casablanca, Morocco, Marrakech, Morocco, Kigali, Rwanda, Dakar, Senegal, Freetown, Sierra Leone, Lomé, Togo, Entebbe, Uganda

Delta Air Lines
4 destinations in Africa
Accra, Ghana, Lagos, Nigeria, Dakar, Senegal, and Johannesburg, South Africa

Ethiopian
Ethiopian Airlines
46 destinations in Africa

South African Airways
29 destinations in Africa
Africa: Hotel Boom

Africa is receiving more attention from international hotel chains than ever before. These chains see the need and value of expanding their business presence across Africa, which is experiencing a boom in both leisure and business travel with prospects for strong growth in the years ahead, especially in Sub-Saharan Africa. Research released in September 2013 by the W Hospitality Group, a founding member of Hotel Partners Africa, reveals that there are 40,000 rooms being planned or constructed on the African continent from now to 2017.

The top city for construction is Lagos, Nigeria, which has 4,080 rooms in development. This is followed by two Egyptian destinations, Cairo, with 2,843 rooms and Hurghada with 2,221 rooms. The next most popular places are Abuja (1,598 rooms), Algiers (1,528 rooms), Tangier (1,505 rooms) and Nairobi (1,437 rooms).

Recent hotel openings include Movenpick Ambassador Hotel in Accra, Ghana; Radisson Blu Hotel in Addis Ababa, Ethiopia; Villa Rosa Kempinski Hotel in Nairobi, Kenya; and Golden Tulip Hotel in Ouagadougou, Burkina Faso. ☺️

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### City 2013 Pipeline Hotels 2013 Rooms 2012 Pipeline Hotels 2012 Rooms % Change in 2013 % Change in 2013

<table>
<thead>
<tr>
<th>City</th>
<th>2013 Hotels</th>
<th>2013 Rooms</th>
<th>2012 Hotels</th>
<th>2012 Rooms</th>
<th>% Change in 2013</th>
<th>% Change in 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lagos</td>
<td>25</td>
<td>4,080</td>
<td>19</td>
<td>3,702</td>
<td>32%</td>
<td>10%</td>
</tr>
<tr>
<td>Cairo</td>
<td>8</td>
<td>2,843</td>
<td>12</td>
<td>2,883</td>
<td>-33%</td>
<td>-1%</td>
</tr>
<tr>
<td>Hurghada</td>
<td>5</td>
<td>2,221</td>
<td>2</td>
<td>1,084</td>
<td>150%</td>
<td>105%</td>
</tr>
<tr>
<td>Abuja</td>
<td>11</td>
<td>1,598</td>
<td>11</td>
<td>1,454</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Algiers</td>
<td>7</td>
<td>1,528</td>
<td>7</td>
<td>1,486</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Tangier</td>
<td>7</td>
<td>1,505</td>
<td>5</td>
<td>1,080</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Nairobi</td>
<td>9</td>
<td>1,437</td>
<td>5</td>
<td>771</td>
<td>80%</td>
<td>86%</td>
</tr>
<tr>
<td>Casablanca</td>
<td>9</td>
<td>1,344</td>
<td>9</td>
<td>1,233</td>
<td>0%</td>
<td>11%</td>
</tr>
<tr>
<td>Accra</td>
<td>7</td>
<td>1,291</td>
<td>8</td>
<td>1,402</td>
<td>-13%</td>
<td>-8%</td>
</tr>
<tr>
<td>Sharm El Sheikh</td>
<td>2</td>
<td>1,213</td>
<td>2</td>
<td>1,235</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Marrakech</td>
<td>6</td>
<td>1,131</td>
<td>11</td>
<td>1,968</td>
<td>-45%</td>
<td>-43%</td>
</tr>
<tr>
<td>Libreville</td>
<td>7</td>
<td>1,218</td>
<td>7</td>
<td>1,342</td>
<td>0%</td>
<td>-1%</td>
</tr>
<tr>
<td>Tripoli</td>
<td>3</td>
<td>1,036</td>
<td>2</td>
<td>1,084</td>
<td>0%</td>
<td>-4%</td>
</tr>
<tr>
<td>Addis Ababa</td>
<td>6</td>
<td>1,019</td>
<td>2</td>
<td>273</td>
<td>200%</td>
<td>273%</td>
</tr>
<tr>
<td>Marsa Alam</td>
<td>2</td>
<td>838</td>
<td>1</td>
<td>265</td>
<td>100%</td>
<td>216%</td>
</tr>
<tr>
<td>Luanda</td>
<td>3</td>
<td>764</td>
<td>3</td>
<td>824</td>
<td>0%</td>
<td>-7%</td>
</tr>
<tr>
<td>Rabat</td>
<td>4</td>
<td>732</td>
<td>3</td>
<td>540</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Conakry</td>
<td>3</td>
<td>659</td>
<td>4</td>
<td>779</td>
<td>-25%</td>
<td>-15%</td>
</tr>
<tr>
<td>Dakar</td>
<td>4</td>
<td>659</td>
<td>4</td>
<td>567</td>
<td>0%</td>
<td>16%</td>
</tr>
<tr>
<td>Cotonou</td>
<td>4</td>
<td>645</td>
<td>3</td>
<td>442</td>
<td>33%</td>
<td>46%</td>
</tr>
<tr>
<td>All Others</td>
<td>75</td>
<td>12,365</td>
<td>87</td>
<td>10,352</td>
<td>-14%</td>
<td>20%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>207</td>
<td>39,834</td>
<td>208</td>
<td>34,326</td>
<td>-16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Over the past half century, tourism has become one of the largest and fastest-growing economic sectors in the world. While source markets have traditionally been concentrated in destinations in Europe and the Americas, emerging economies in Asia, Central and Eastern Europe, the Middle East, Africa and Latin America, with their rising levels of disposable incomes, are being highlighted as the future drivers of the industry. Today, emerging economies lead growth in tourism demand.

According to the UNWTO, international tourist arrivals are expected to increase by 3.3% a year on average, reaching 1.8 billion by 2030. Travel to emerging destinations is also expected to grow at double the pace (+4.4% a year) of advanced economy destinations (+2.2% a year). As a result, tourism arrivals in emerging economies are expected to surpass those in advanced economies by 2015. ("Tourism Towards 2030," 2011)

Here are some notable highlights:

- The Russian Federation saw a 30% increase (US$ 43 billion) in 2012, moving it from 7th to 5th place in the ranking of international tourism spending. [UNWTO]

- Brazil, with an expenditure of US$ 22 billion in 2012, moved up to 12th place, from 29th place in 2005 in terms of tourism spending. [UNWTO]

- India, along with China and Russia, is regarded as one of the most promising source markets, with UNWTO predicting that India will account for 50 million outbound tourists by 2020.

- Strong business, cultural and linguistic ties between countries makes intra-regional travel a strong market for growth.

What all this means is that Africa's travel and tourism industry will need to adapt its business models (e.g. adapting to culinary tastes and tailoring services) to take advantage of both inbound and outbound opportunities in the BRIC nations. 🌍
Like U.S. outbound travel to overseas destinations (excluding Canada and Mexico), Africa has seen ups and downs in the share of travelers visiting the continent. However, unlike other destinations, which have seen an overall decline of 10% in American visitors since 2006, Africa has witnessed a 34% increase in arrivals from the U.S.

**Trends in Total Overseas* Visitors to Africa**

When we look at where U.S. travelers go, Europe is by far the largest regional destination, but its market share has dropped four percentage points since 2006. The Africa/Middle East region has benefited the most from Europe’s decline, but these regions are also the smallest destinations for U.S. outbound travel. In fact, for the last three years, the Africa/Middle East region has accounted for nearly 10% of the overseas travelers. This is a peak for the region, which has seen its share increase four percentage points since 2006.

**Top U.S. Census Regions for U.S. Travelers to Africa: 2006 vs. 2011**

Looking to the future, the outlook for travel to Africa from the U.S. is bright, with the South Atlantic states providing the highest percentage of travelers to the continent. Along with niche travel markets, Africa should focus on these areas of tourist origin when packaging products with group needs in mind.

Ron Erdmann, Deputy Director of the Office of Travel & Tourism Industries for the International Trade Administration at the US Department of Commerce
HIGHLIGHTS

• China is the number one outbound tourism source market in the world with more than 83 million border crossings from the country. (UNWTO)

• Chinese are now the top international tourism spenders, with 83 million travelers spending US$102 billion in 2012, a 40% jump from 2011. (UNWTO)

• Chinese are becoming increasingly travel savvy, globally connected, under 45 and green. They’re also beginning to move from group travel to semi- and self-organized travel. (COTRI)

China-Africa Travel & Tourism

China has developed into the biggest international tourism source market in the world. Between July 2013 and June 2014, according to the forecast of COTRI, more than 106 million border crossings from Mainland China can be expected. This would be a rise of 28% from the 83 million visitors who arrived from China in 2012. The market is however not just growing in numbers, the segmentation and differentiation is also steadily progressing. Experienced Chinese travelers look more and more for experiences beyond sightseeing and for more exotic destinations than Paris, Sydney or New York.

Africa has the great opportunity to offer tourism services not only to the many Chinese already living and working in African countries but also to the affluent repeat-travelers who want to find places which are welcoming Chinese visitors and cater for their specific needs. Attracting Chinese customers is less a question of marketing than first of all a question of product adaptation. With customized training and quality assurance measures for the tourism industry like the “Chinese Tourists Welcoming” training programs and Program Quality labels for companies and destinations provided by COTRI, Africa will continue to see the number of Chinese exploring the continent rising sharply.

Prof. Dr. Wolfgang Georg Arit FRGS, Director of COTRI
(China Outbound Tourism Research Institute)
www.china-outbound.com
## Growing Africa Tourism Through Social Media

Social Media platforms, like Facebook, Twitter, YouTube and Instagram, have not only become an important way to help consumers plan their trips, but they’re also a way to share experiences and seek opinions and reviews of destinations, airlines, hotels, attractions, and restaurants online or with smartphone technologies. At the same time, social media is a means for African destinations to distribute a brand message across various platforms and around the globe.

## Tracking On-Line Bookings for Africa

Tracking Expedia Inc.’s on-line bookings (e.g. air, hotel and packages) in Africa not only shows the company’s on-line travel performance in 2012, but it also reveals where the tourists and travelers are coming from and where they’re heading.

The majority of Expedia’s 2012 bookings (air, hotel, packages, etc.) in Africa focused on three North African destinations: Morocco (33%), Egypt (15%) and Tunisia (9%). South Africa (16%) was the second top destination for bookings; however, the Southern Africa region had the smallest share of business (5%). East Africa (12%) showed solid growth, followed by West Africa (10%).

Marrakech (17%) led the pack of 15 African city destinations in Expedia’s 2012 bookings, followed by Cape Town (9%) and Johannesburg (7%).

In terms of origin, the top 3 countries (USA, UK and France) represent 57% of the visitors versus 71% in 2012. Countries showing significant growth in their visitor numbers to Africa in 2013 compared to the same period in 2012 included: the Netherlands (50%); Denmark (62%), Korea (78%); China (110%); Taiwan (394%), and the Philippines (571%).

“By leveraging social media, destinations in Africa can share their story with people across the globe in new and engaging ways. With platforms like YouTube and Google+, marketers can use the power of sight, sound and motion to help travelers virtually explore new destinations before they visit. Africa has so much more to offer than the stereotypical safari, and digital can provide a great canvas to bring the African story to life.”

**David Pavelko,** Head of Industry at Google Travel

Africa Travel Association’s U.S.-Africa Tourism Seminar, Washington, DC, 2013
Join us in Cameroon: A Microcosm of Africa

ATA’S 38TH WORLD CONGRESS, OCTOBER 16-20, 2013

The Africa Travel Association (ATA) will hold its 38th Annual ATA World Congress in Cameroon from October 16 to 20, 2013. Hosted by the Ministry of Tourism and Leisure of Cameroon, the event will take place in the southwest region of the country, with a focus on Buea, the regional capital, and Limbe, a tranquil seaside city on the slopes of Mount Cameroon, one of Africa’s highest peaks and largest volcanoes. ATA held its 37th Congress, which attracted nearly 500 delegates from government, business and the non profit sector, in Victoria Falls, Zimbabwe from May 18 to 22, 2012.

For the second year in a row, New York University-Gallatin and New York University-Africa House awarded two fellowships to two NYU students to support travel to and research on Africa in summer 2012. As part of their research, the Gallatin School recipients, graduate student Declan B. Galvin and undergraduate Martha O’Donovon, participated in the Africa Travel Association’s World Congress in Victoria Falls from May 18-22, 2012 and produced an outcome report.

Following the Congress, Declan stayed in Victoria Falls for two months and carried out research on the informal economic activities along the borderlands of Zimbabwe and Zambia, gaining insights into the obstacles facing the artist and street hawking community, which depends exclusively on the tourist season to make a living. Martha O’Donovon worked with Magamba Cultural Activist Network in Zimbabwe, studying the use of hip hop as a medium for political and social change. In spring 2013, Declan and Martha presented their findings from Zimbabwe at the Africa House fellow symposium at New York University.
AFRICA TRAVEL ASSOCIATION (ATA)

The Africa Travel Association (ATA) is the world’s leading travel trade association promoting travel and tourism to Africa and strengthening intra-Africa partnerships to make it happen. Established in 1975, ATA serves both the public and private sectors of the international travel and tourism industry. ATA membership comprises African governments, their tourism ministers, tourism bureaus and boards, airlines, cruise lines, hotels, resorts, front-line travel sellers and providers, tour operators and travel agents, students and young professionals, multi-platform media, and affiliate industries. ATA’s annual events in Africa and the United States bring together government leaders and industry professionals to shape Africa’s tourism agenda and showcase the continent’s latest trends and products. ATA is registered as a non-profit trade association with headquarters in New York and chapters around the world.

www.africatravelassociation.org

NEW YORK UNIVERSITY-AFRICA HOUSE

New York University-Africa House is an interdisciplinary institute devoted to the study of contemporary Africa, focusing on economic, political, and social issues on the continent and programs in the Arts. Part of Africa House’s core mission is to advance the understanding of the links between Africa and the rest of the world, through the social, historical, economic and other lenses. Related to this, we also have relationships with African immigrant communities in New York City. NYU has a large number of professors and students doing research in the areas of economic development, economic growth and macroeconomics, microfinance, analysis of the effectiveness of foreign aid, politics and political economy, law and legal institutions. Africa House regularly convenes high level talks and seminars, and has in the past welcomed African heads of state. NYU-Africa House programs take place in New York City and in various capitals in Africa.

www.nyuafricahouse.org
AFRICA DEVELOPMENT BANK GROUP (AFDB)

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

www.afdb.org