Sub-Saharan Africa
### SSA Countries by Tourism Development Level and World Bank Income Ranking

<table>
<thead>
<tr>
<th>Tourism development level</th>
<th>Low income</th>
<th>Lower-middle income</th>
<th>Upper-middle income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-emerging</td>
<td>Central African Republic, Chad, Comoros, Democratic Republic of Congo, Eritrea, Guinea, Guinea-Bissau, Liberia, Niger, Somalia, Togo</td>
<td>Republic of Congo, Equatorial Guinea, Sudan</td>
<td>N/A</td>
</tr>
<tr>
<td>Potential</td>
<td>Benin, Burundi, Ethiopia, Madagascar, Mali, Mauritania, São Tomé and Príncipe, Sierra Leone</td>
<td>Angola, Cameroon, Côte d'Ivoire, Lesotho, Nigeria, Swaziland</td>
<td>Gabon</td>
</tr>
<tr>
<td>Emerging</td>
<td>Burkina Faso, The Gambia, Malawi, Mozambique, Rwanda, Senegal, Uganda, Zambia, Zimbabwe</td>
<td>N/A</td>
<td>The Seychelles</td>
</tr>
<tr>
<td>Consolidating</td>
<td>Kenya, Tanzania</td>
<td>Cape Verde, Ghana</td>
<td>Botswana, Mauritius, Namibia, South Africa</td>
</tr>
</tbody>
</table>

**Sources:** World Bank Country Income Classifications 2009; World Bank 2010a.

**Note:** N/A = not applicable.
Tourism Potential in SSA

Sources: Authors; World Bank 2011.
Africa Tourist Arrivals by Region, 2010

Sources: Authors, UNWTO 2013.

Top Source Markets for Africa

Sources: World Bank, Africa House, ATA 2010
Top 75 Routes by Daily Seat Capacity, August, 2010

Typical Mix of Passengers on African Carriers

**International**

- Tourism: 15%
- Small Business/Traders: 25%
- Traditional Business: 30%
- Visit Family/Relatives: 30%

Source: ICF SH&E Analysis.
One-way Average Fares: Africa versus Other Regions

Source: SH&E 2010.
Note: Fare data for Africa includes intra-Africa and Africa-Middle East.

Visa Requirements for SSA

Source: ICF SH&E Analysis.
Tourism Product Opportunities in SSA


Vast tourism resources can become economically productive assets.
Contribution of Tourism to Each Country’s Gross Domestic Product in SSA

Source: UNWTO, 2013
### Geographic Location of Case Studies

<table>
<thead>
<tr>
<th>Country</th>
<th>Project name</th>
<th>Project category</th>
<th>Salient features of tourism development</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Costa Rica</td>
<td>Lapa Rios</td>
<td>Ecotourism</td>
<td>- Environmental conservation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Tourism certification, including ethics code</td>
</tr>
<tr>
<td>2. Cape Verde</td>
<td>Transformation in a small country</td>
<td></td>
<td>- Market-oriented policies and democratic processes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Quality air transport infrastructure, supportive air policies</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Scale, form, and type compatible with available resources</td>
</tr>
<tr>
<td>3. Dominica</td>
<td>Jungle Bay</td>
<td>Island ecolodge</td>
<td>- Ecotourism integration into world tourism institutions (timesharing)</td>
</tr>
<tr>
<td>4. Dominican Republic</td>
<td>Puerto Plata</td>
<td>Coastal estate resort</td>
<td>- Political support for tourism</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Transition from public to private investment</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Model widely replicated in country</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Sanitation requirements</td>
</tr>
<tr>
<td>5. Dominican Republic</td>
<td>Future sector growth</td>
<td>Economic and policy analysis</td>
<td>- Future dispersion of growth in the country</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Carrying capacity and diversification of product line</td>
</tr>
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</tr>
</tbody>
</table>
| 6. Dubai          | Nontraditional economic growth| National transformation                               | - New source of growth in face of depleting oil reserves  
- How to launch a new sector  
- Investment and promotion                                                                 |
| 7. Egypt          | Sharm el Sheikh               | Coastal development                                   | - Product diversification  
- Land acquisition  
- Institutional rationalization                                                                 |
| 8. Indonesia      | Bali                          | Island, large resort                                  | - Protection of cultural heritage  
- Institutional framework  
- Airline access and infrastructure development                                                                 |
| 9. Indonesia      | Niihawatu                     | Island ecolodge                                       | - Community partnerships  
- Social inclusion and charitable donations                                                                 |
| 10. Jordan        | Aqaba                         | Multisector resort and industrial development         | - New coastal resort development  
- Integration of multisector investment in economic zone                                                                 |
| 11. Kenya         | Nairobi                       | Convention, incentive, meetings and exhibitions        | - Business versus leisure travel, diversification of product line  
- Convention facility investment  
- Targeted marketing                                                                 |
| 12. Republic of Korea | Kyongju                  | Historic city                                          | - Poor coordination and access  
- Market timing                                                                 |
| 13. Maldives      | Island resorts                | Multi-island resort development                       | - Transparent evaluation of resort bids  
- Planning framework and environmental controls  
- Business environment  
- Airline access                                                                 |
| 14. Mauritius     | National tourism              | Policy framework                                      | - Export and investment promotion  
- Training  
- Control of supply  
- Airline policy                                                                 |
| 15. Mexico        | Cancún                        | City resort of 240 hotels on formerly deserted island | - Location and scale  
- Role of public sector developer, FONATUR  
- All-inclusive tourism                                                                 |
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| 16. Morocco   | Bay of Agadir                       | Rebuilding of city following earthquake | - Mixed use resort development, residential, commercial and hotel  
- Business environment, open skies, political support  
- Project stopped for political difficulties |
| 17. Morocco   | Coastal cities tourism              | Preparing city beach sited for private tender | - Strengthening ministry’s role as tourism planner  
- Regulation and promotion of private investment  
- Parallel measures in support of resort development |
| 18. Namibia   | Wilderness travel                   | Public-private partnerships              | - Concessioning community land to private sector  
- Improved wildlife management through conservancies |
| 19. South Africa | Wilderness Safaris &Beyond         | Public-private partnerships              | - Land management  
- Concessioning community land to private sector |
| 20. Rwanda    | Sabyinyo Silverback Lodge           | Protection of mountain gorillas          | - Community partnerships with private sector  
- Biodiversity protection |
| 21. Singapore | Sentosa Island                      | Day-trip playground and island resort development | - Building a resort to appeal to residents and international visitors  
- Importance of training |
| 22. Tanzania  | Mt. Kilimanjaro                     | Mountaineering packages                 | - Poverty reduction analysis  
- Sanitation and management  
- Trade unions for porters, guides and cooks |
| 23. Tunisia   | Infrastructure in six zones         | Coastal city resort development         | - Integrated national development  
- Institutional framework, including land bank |
| 24. Turkey    | South Antalya                       | Large-scale resort                      | - Model widely replicated throughout the country  
- Staff housing problems |
The book will be available for download at www.worldbank.org/afro/tourism.