

Extracted Figures

# Tourism in Africa:

Harnessing Tourism for Growth  
and Improved Livelihoods



THE WORLD BANK

Iain Christie, Eneida Fernandes,  
Hannah Messerli, and Louise Twining-Ward



# Sub-Saharan Africa



IBRD 40140 JULY 2013  
This map was produced by the Map Design Unit of The World Bank. The boundaries, colors, denominations and any other information shown on this map do not imply, on the part of The World Bank Group, any judgment on the legal status of any territory, or any endorsement or acceptance of such boundaries.

# Framework for Progressive Destination Competitiveness



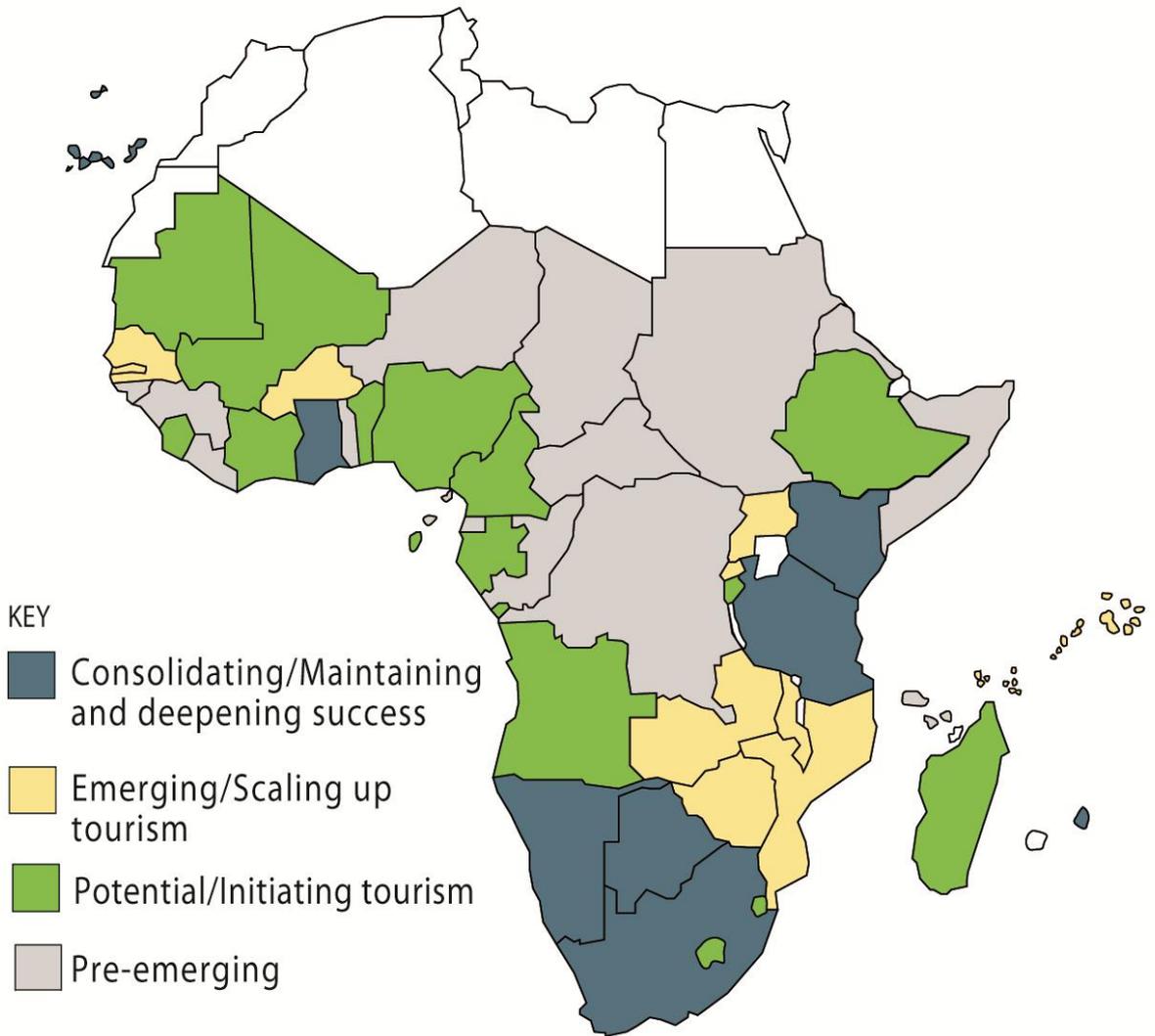
## SSA Countries by Tourism Development Level and World Bank Income Ranking

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

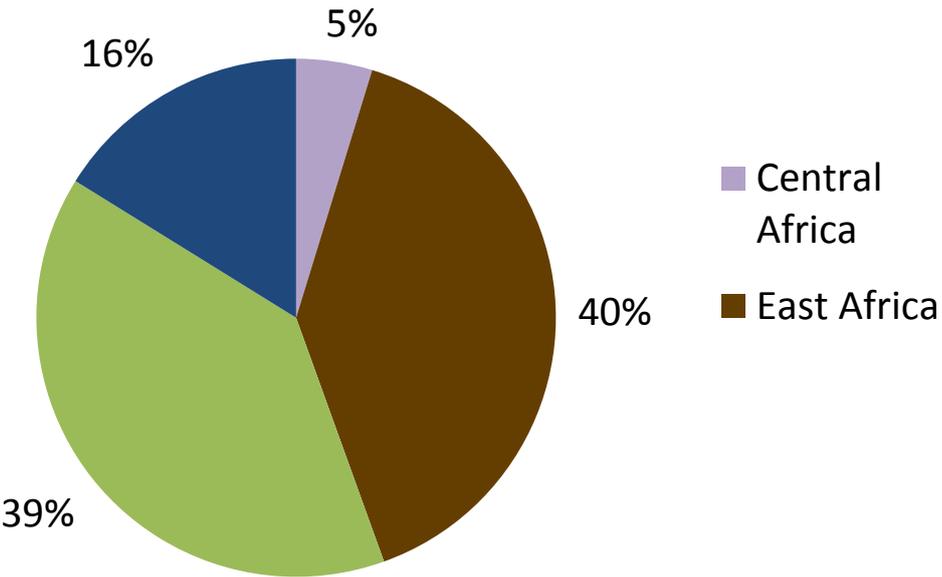
Sources: World Bank Country Income Classifications 2009; World Bank 2010a.

Note: N/A = not applicable.

# Tourism Potential in SSA

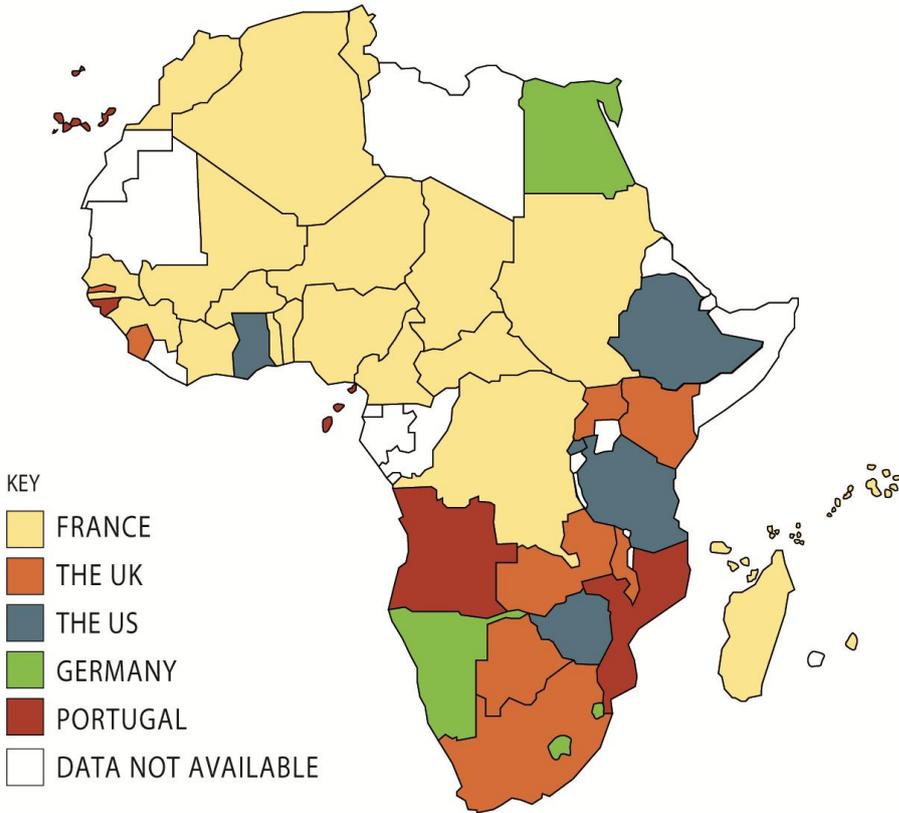


# Africa Tourist Arrivals by Region, 2010



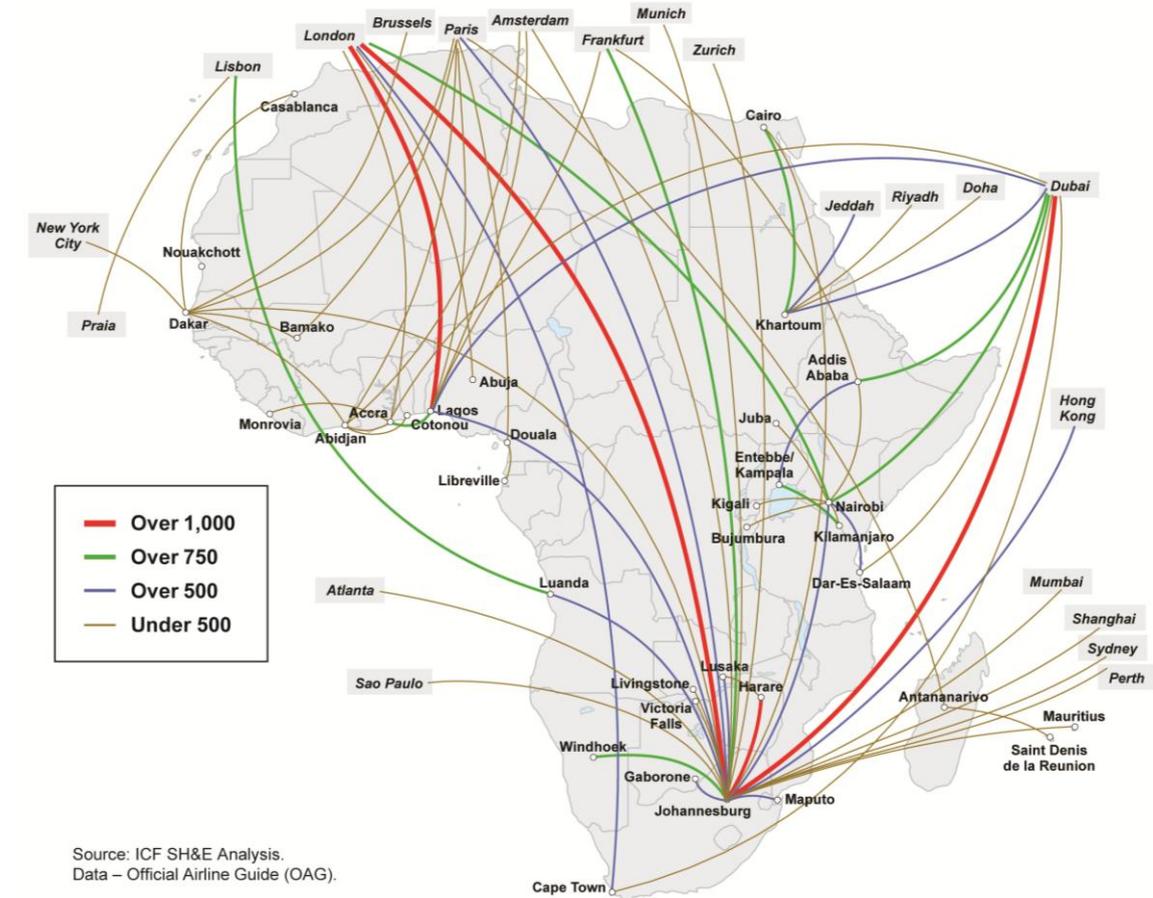
Sources: Authors, UNWTO 2013.

# Top Source Markets for Africa



Sources: World Bank, Africa House, ATA 2010

# Top 75 Routes by Daily Seat Capacity, August, 2010

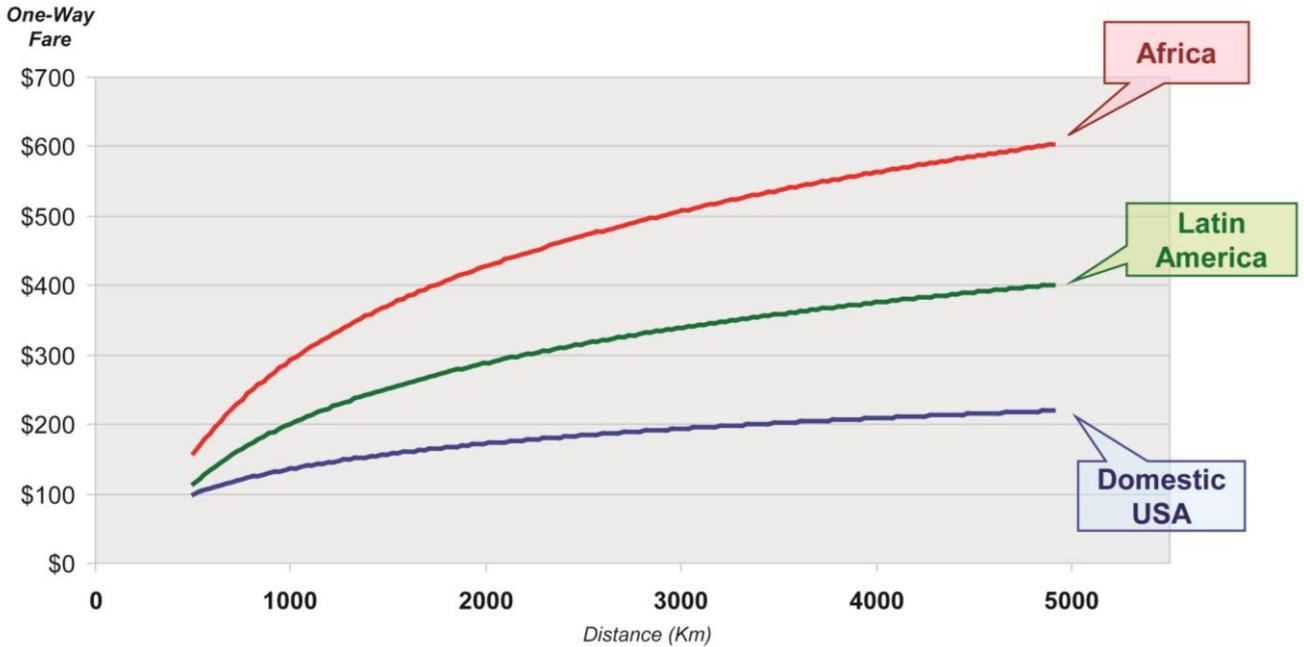


## Typical Mix of Passengers on African Carriers

### International



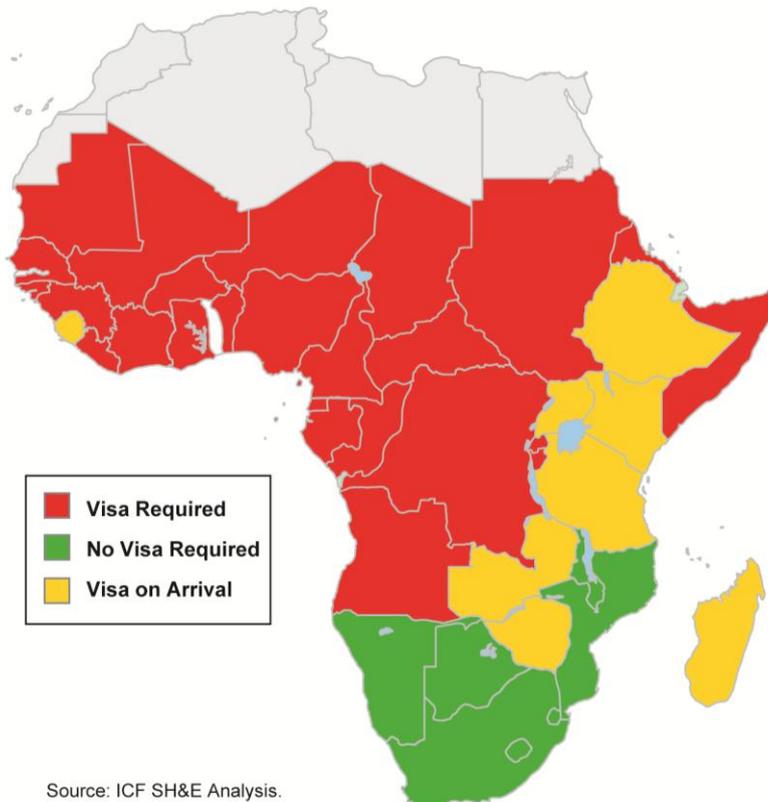
# One-way Average Fares: Africa versus Other Regions



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.

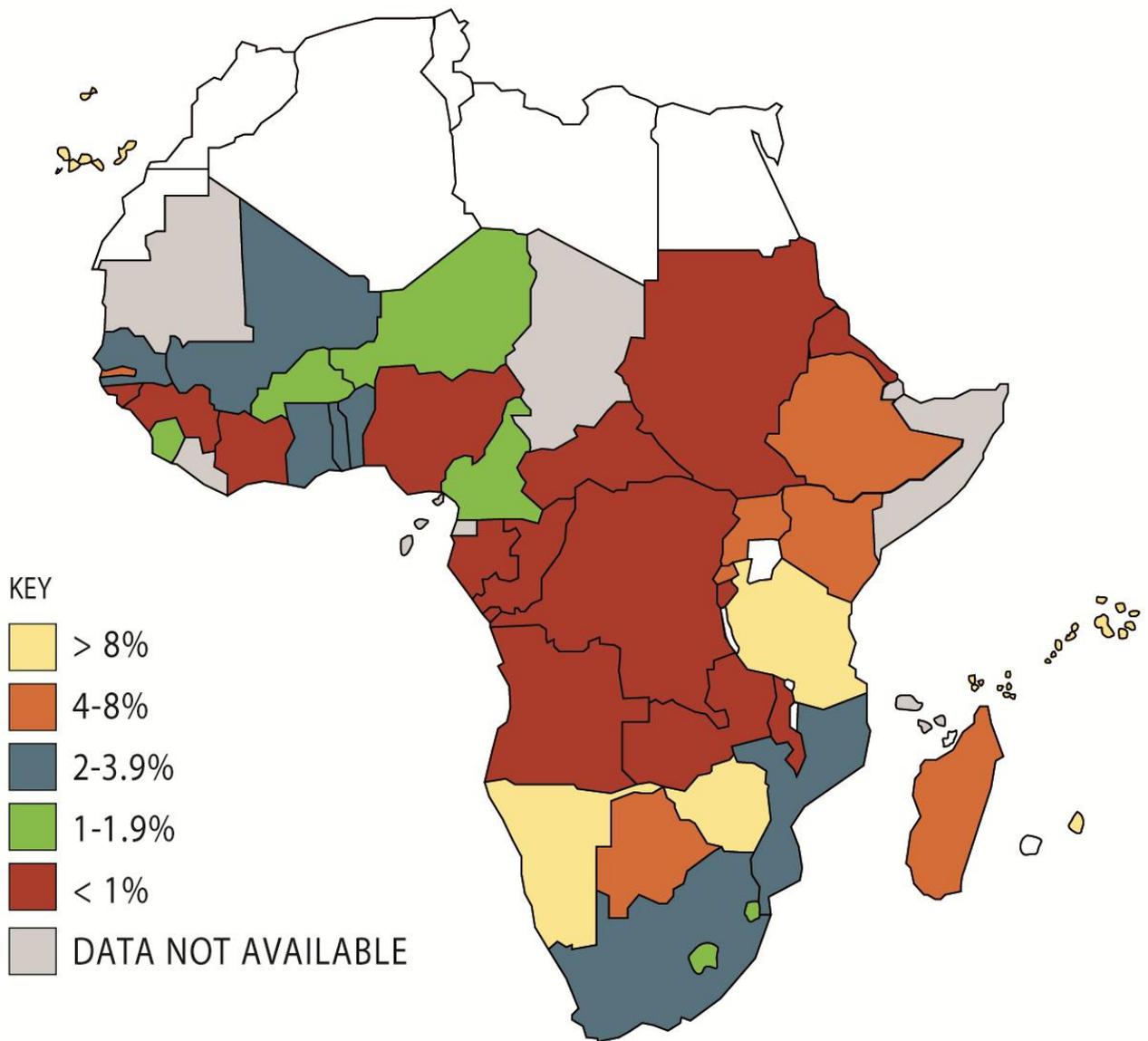
# Tourism Product Opportunities in SSA



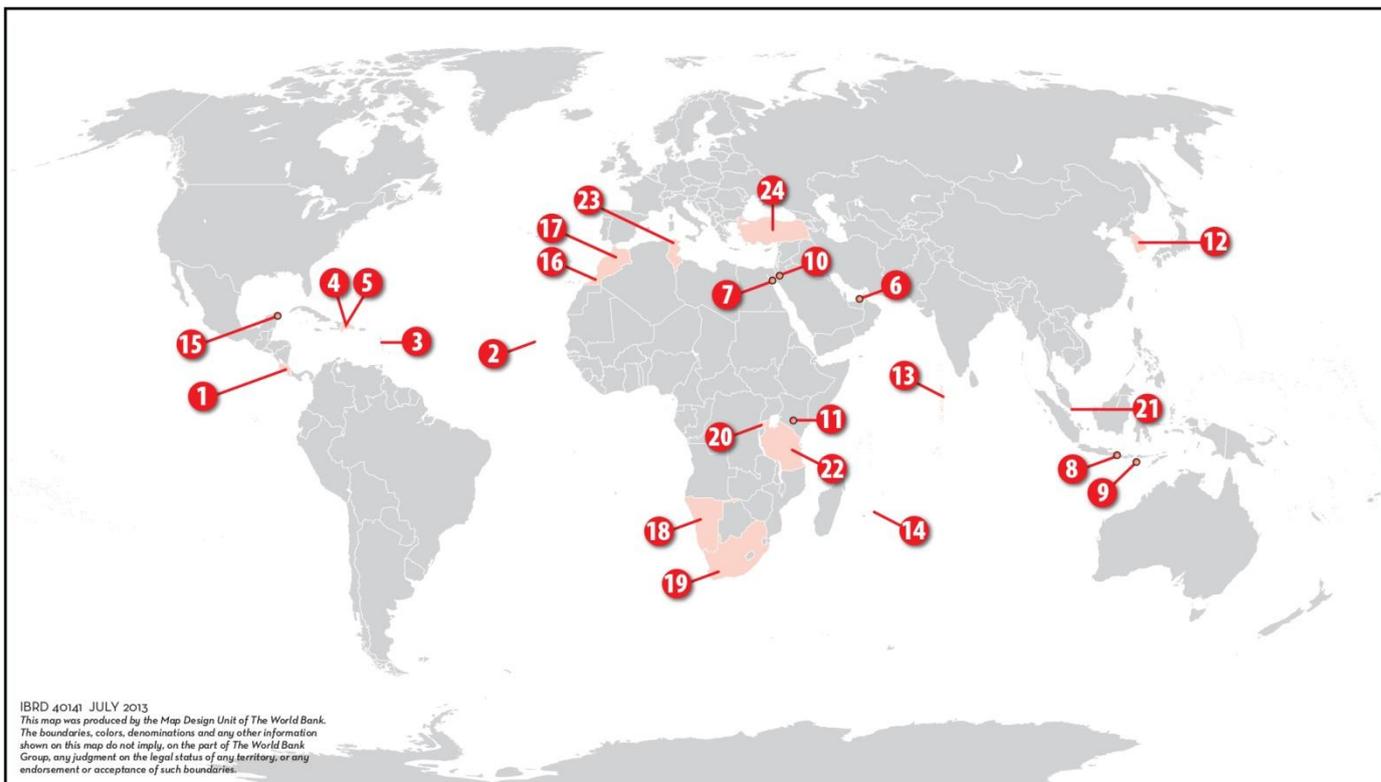
Source: World Bank, AFTFP 2011.

Vast tourism resources  
can become economically  
productive assets.

# Contribution of Tourism to Each Country's Gross Domestic Product in SSA



# Geographic Location of Case Studies



Country	Project name	Project category	Salient features of tourism development
1. Costa Rica	Lapa Rios	Ecotourism	<ul style="list-style-type: none"> <li>- Environmental conservation</li> <li>- Tourism certification, including ethics code</li> </ul>
2. Cape Verde		Transformation in a small country	<ul style="list-style-type: none"> <li>- Market-oriented policies and democratic processes</li> <li>- Quality air transport infrastructure, supportive air policies</li> <li>- Scale, form, and type compatible with available resources</li> </ul>
3. Dominica	Jungle Bay	Island ecolodge	<ul style="list-style-type: none"> <li>- Ecotourism integration into world tourism institutions (timesharing)</li> </ul>
4. Dominican Republic	Puerto Plata	Coastal estate resort	<ul style="list-style-type: none"> <li>- Political support for tourism</li> <li>- Transition from public to private investment</li> <li>- Model widely replicated in country</li> <li>- Sanitation requirements</li> </ul>
5. Dominican Republic	Future sector growth	Economic and policy analysis	<ul style="list-style-type: none"> <li>- Future dispersion of growth in the country</li> <li>- Carrying capacity and diversification of product line</li> </ul>

Country	Project name	Project category	Salient features of tourism development
6. Dubai	Nontraditional economic growth	National transformation	<ul style="list-style-type: none"> <li>- New source of growth in face of depleting oil reserves</li> <li>- How to launch a new sector</li> <li>- Investment and promotion</li> </ul>
7. Egypt	Sharm el Sheikh	Coastal development	<ul style="list-style-type: none"> <li>- Product diversification</li> <li>- Land acquisition</li> <li>- Institutional rationalization</li> </ul>
8. Indonesia	Bali	Island, large resort	<ul style="list-style-type: none"> <li>- Protection of cultural heritage</li> <li>- Institutional framework</li> <li>- Airline access and infrastructure development</li> </ul>
9. Indonesia	Nihiwatu	Island ecolodge	<ul style="list-style-type: none"> <li>- Community partnerships</li> <li>- Social inclusion and charitable donations</li> </ul>
10. Jordan	Aqaba	Multisector resort and industrial development	<ul style="list-style-type: none"> <li>- New coastal resort development</li> <li>- Integration of multisector investment in economic zone</li> </ul>
11. Kenya	Nairobi	Convention, incentive, meetings and exhibitions	<ul style="list-style-type: none"> <li>- Business versus leisure travel, diversification of product line</li> <li>- Convention facility investment</li> <li>- Targeted marketing</li> </ul>
12. Republic of Korea	Kyongju	Historic city	<ul style="list-style-type: none"> <li>- Poor coordination and access</li> <li>- Market timing</li> </ul>
13. Maldives	Island resorts	Multi-island resort development	<ul style="list-style-type: none"> <li>- Transparent evaluation of resort bids</li> <li>- Planning framework and environmental controls</li> <li>- Business environment</li> <li>- Airline access</li> </ul>
14. Mauritius	National tourism	Policy framework	<ul style="list-style-type: none"> <li>- Export and investment promotion</li> <li>- Training</li> <li>- Control of supply</li> <li>- Airline policy</li> </ul>
15. Mexico	Cancún	City resort of 240 hotels on formerly deserted island	<ul style="list-style-type: none"> <li>- Location and scale</li> <li>- Role of public sector developer, FONATUR</li> <li>- All-inclusive tourism</li> </ul>

Country	Project name	Project category	Salient features of tourism development
16. Morocco	Bay of Agadir	Rebuilding of city following earthquake	<ul style="list-style-type: none"> <li>- Mixed use resort development, residential, commercial and hotel</li> <li>- Business environment, open skies, political support</li> <li>- Project stopped for political difficulties</li> </ul>
17. Morocco	Coastal cities tourism	Preparing city beach sited for private tender	<ul style="list-style-type: none"> <li>- Strengthening ministry's role as tourism planner</li> <li>- Regulation and promotion of private investment</li> <li>- Parallel measures in support of resort development</li> </ul>
18. Namibia	Wilderness travel	Public-private partnerships	<ul style="list-style-type: none"> <li>- Concessioneering community land to private sector</li> <li>- Improved wildlife management through conservancies</li> </ul>
19. South Africa	Wilderness Safaris & Beyond	Public-private partnerships	<ul style="list-style-type: none"> <li>- Land management</li> <li>- Concessioneering community land to private sector</li> </ul>
20. Rwanda	Sabyinyo Silverback Lodge	Protection of mountain gorillas	<ul style="list-style-type: none"> <li>- Community partnerships with private sector</li> <li>- Biodiversity protection</li> </ul>
21. Singapore	Sentosa Island	Day-trip playground and island resort development	<ul style="list-style-type: none"> <li>- Building a resort to appeal to residents and international visitors</li> <li>- Importance of training</li> </ul>
22. Tanzania	Mt. Kilimanjaro	Mountaineering packages	<ul style="list-style-type: none"> <li>- Poverty reduction analysis</li> <li>- Sanitation and management</li> <li>- Trade unions for porters, guides and cooks</li> </ul>
23. Tunisia	Infrastructure in six zones	Coastal city resort development	<ul style="list-style-type: none"> <li>- Integrated national development</li> <li>- Institutional framework, including land bank</li> </ul>
24. Turkey	South Antalya	Large-scale resort	<ul style="list-style-type: none"> <li>- Model widely replicated throughout the country</li> <li>- Staff housing problems</li> </ul>



The book will be available for download at [www.worldbank.org/afr/tourism](http://www.worldbank.org/afr/tourism).



**THE WORLD BANK**

1818 H Street, NW  
Washington, DC, 20433, USA  
[www.worldbank.org/africa](http://www.worldbank.org/africa)