

Chapter 2

Tourism in Africa: Issues and Prospects



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2.1 Introduction

This chapter sets out the current state of tourism to and within Africa, highlighting the key themes and issues that confront the industry across the continent. The trend issues have human resource consequences for the tourism sector there, in terms of attracting the quality staff to meet the increasingly globalized service standards. The implications from these trends will mean further marginalization of Africa in the global ‘pleasure periphery’ in the near future. By definition, but consistent with the UN World Tourism Organization’s (WTO’s) regional classification of countries for tourism statistics purposes, ‘Africa’ refers to the Islamic countries of the northern sub-region (excluding Egypt and Libya) as well as sub-Saharan Africa—the central, eastern, southern and western sub-regions—and the Atlantic and Indian Ocean Africa islands (Dieke, 2003, 2013). ‘Issues and prospects’ describe the challenges and opportunities associated with the process of developing tourism: the reasons they arise, the responses to them and the outcome of the measures (Dieke, 2009).

First, the chapter critically reviews, in brief, the role of international tourism in development. Second, it relates the analysis to the African continent by discussing a wide range of global and regional factors that influence tourism’s inclusion in, and implications for, development strategies. In the third place, the chapter identifies and discusses the major ‘areas of concern’ in relation to the sustainability of the tourism

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sector in the region in the twenty-first century. Finally, the chapter considers the way forward, suggesting how some of the challenges might be overcome.

2.2 International Tourism in Development

Many countries, both developed and developing, have recognized the advantages that international tourism can contribute to their development efforts (Jenkins, 2015; Sharpley & Telfer, 2015). These advantages can be encapsulated in six areas: earning of foreign exchange, contribution to government revenues, creation of employment opportunities, generation of income, stimulus to inward investment and regional development.

In this chapter, there is no space to explore these impacts in detail but it is worth noting that although invariable emphasis is given to the economic advantages of tourism, there are inevitable impacts of a social, cultural and environmental nature that have to be considered in any sustainable development strategy. If these potential impacts are not considered, then they may be the very factors that will compromise the sustainability of the sector. For example, development experience and many academic studies (Christie, Fernandes, Messerli, & Twining-Ward 2013; Novelli, 2015; Rogerson, 2007; UNCTAD, 2017) have indicated that the scale, type and location of tourism developments are critical factors in gaining community acceptance of proposals. There is a growing awareness of these considerations among development planners and to a greater extent tourism development is now taking these community views into account. To improve the chances of developing a sustainable tourism sector any proposed developments have to integrate into the community and not confront it.

The following paragraphs take a more balanced view, explore the preceding issues within a broader framework of international tourism economy, relate the synthesis to African tourism perspectives and assess the development potential for international tourism in Africa if the continent is to successfully compete in the global tourism marketplace.

2.3 Global and Regional Tourism: Trend Analysis

2.3.1 Global Context

The extent and impact of tourism, both at global and regional levels, can be seen by reference to Tables 2.1, 2.2 and 2.3 (see also Emeraldinsight, 2019). It is evident (Table 2.1) that 1,323 million tourists travelled globally in 2017, some 84 million more than the previous year and a new record. This was an increase of 7% in comparison with 2016, a highest growth rate since 2010. The sector has now seen

Table 2.1 International tourist arrivals (by sub-regions)

	International tourist arrivals (million)										Market share (%)	Change (%)		Average annual growth (%)
	1995	2000	2005	2010	2015	2016	2017	2017	16/15	17/16		2005–17		
World	531	680	809	952	1,195	1,239	1,323	100			3.7	6.8	4.2	
Advanced economies	342	430	469	515	655	685	725	54.8			4.7	5.8	3.7	
Emerging economies	189	250	339	437	540	554	597	45.2			2.5	7.9	4.8	
By UNWTO regions	308.5	392.9	452.7	487.7	605.1	619	671.1	50.7			2.3	8.4	3.3	
Europe:	36.4	44.8	54.7	56.6	69.8	73.8	77.3	5.8			5.8	4.8	3	
Northern Europe	112.2	139.7	141.7	154.4	181.5	181.5	194.6	14.7			0	7.2	2.6	
Western Europe	58.9	69.6	95.3	98.6	122.4	126.7	133	10.1			3.5	4.9	2.9	
Central/Eastern Europe	100.9	139	161.1	178.1	231.4	237.1	266.2	20.1			2.4	12.3	4.3	
Southern/Mediterranean Europe of which EU – 28	271	336.8	367.5	383	478.6	499.8	538.1	40.7			4.4	7.7	3.2	
Asian and the Pacific:	82	110.4	154.1	208.2	284.1	305.9	323.2	24.4			7.7	5.6	6.4	
North-East Asia	41.2	58.4	85.9	111.5	142.1	154.3	159.5	12.1			8.6	3.4	5.3	
South-East Asia	28.5	36.3	49	70.5	104.2	110.8	120.4	9.1			6.3	8.6	7.8	
Oceania	8.1	9.6	10.9	11.5	14.3	15.7	16.6	1.3			9.7	6	3.6	
South Asia	4.2	6.1	8.3	14.7	23.5	25.1	26.7	2			7	6.1	10.2	
Americas:	108.9	128.2	133.3	150.4	193.7	200.7	207.3	15.7			3.6	3.3	3.8	
North America	80.5	91.5	89.9	99.5	127.5	130.9	133.3	10.1			2.7	1.8	3.4	
Caribbean	14	17.1	18.8	19.5	24.1	25.2	26.1	2			4.7	3.4	2.7	
Central America	2.6	4.3	6.3	7.8	10.2	10.7	11.2	0.8			4.1	4.7	4.9	

(continued)

Table 2.1 (continued)

	International tourist arrivals (million)										Market share (%)	Change (%)		Average annual growth (%)
	1995	2000	2005	2010	2015	2016	2017	2017	16/15	17/16		2005–17		
South America	11.7	15.3	18.3	23.6	31.9	33.9	36.7	2.8	6.3	8.4	6			
Africa:	18.7	26.2	34.8	50.4	53.6	57.8	63	4.8	7.9	9	5			
North Africa	7.3	10.2	13.9	19.7	18	18.9	21.7	1.6	5	14.7	3.8			
Sub-Saharan Africa	11.5	16	20.9	30.7	35.6	38.9	41.3	3.1	9.3	6.2	5.8			
Middle East:	12.7	22.4	33.7	55.4	58.1	55.6	58.2	4.4	-4.4	4.6	4.7			

Source UN World Tourism Organization (2018), *UNWTO tourism highlights*, 30th August

Table 2.2 International tourism receipts (by sub-regions)

		International tourism receipts											
		Change					US\$					Euro	
		Local currencies, constant prices (%)		Market share (%)			Receipts per arrival (billion)					Receipts per arrival	
16/15	17/16	2017	2015	2016	2017	2017	2015	2016	2017	2015	2016	2017	
World	2.6	4.9	100	1,221	1,245	1,34	1,010	1,101	1,124	1,186	900		
Advanced economies	1.9	4.2	65	799	814	870	1,200	720	735	770	1,060		
Emerging economies	3.9	6.2	35	423	431	470	790	381	389	416	700		
By UNWTO regions	1.7	8	39	468	668.1	519.2	770	421.8	422.9	459.6	690		
Europe:	8.5	7.7	7	82	83.2	89.2	1,150	73.9	75.2	79.4	1,020		
Northern Europe	-1.2	5.1	13	159.2	157.2	170.5	880	143.5	142.1	150.9	780		
Western Europe	6.2	6.6	4	50.4	52.6	59.9	450	45.5	47.5	53	400		
Central/Eastern Europe	-0.2	11.1	15	176.3	171.5	199.1	750	158.9	158.2	176.3	660		
Southern/Mediterranean Europe of which EU – 28	3.4	7.3	33	390.3	396.9	438.4	820	351.8	358.6	388	720		
Asian and the Pacific:	4.1	2.6	29	355.6	370.8	389.6	1,210	320.5	335	344.8	1,070		
North-East Asia	0.1	-5.1	12	167.1	169.5	162.2	1,020	150.6	153.2	143.6	900		
South-East Asia	9.1	9.2	10	108.7	116.7	130.7	1,090	98	105.5	115.7	960		

(continued)

Table 2.2 (continued)

		International tourism receipts										
		Change					US\$			Euro		
		Local currencies, constant prices (%)		Market share (%)		Receipts per arrival (billion)			Receipts per arrival			
16/15	17/16	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	
Oceania	7	6.3	4	47.7	51.2	57.1	3,440	43	46.3	50.5	3,040	
South Asia	3.9	12.9	3	32.1	33.3	39.5	1,490	28.9	30.1	35	1,320	
Americas:	2.3	1.3	24	307.3	313.7	326.2	1,560	277	283.4	288.7	1,380	
North America	1.7	0.8	19	241.2	244.6	252.4	1,870	217.4	221	223.4	1,660	
Caribbean	5.5	4.2	2	28.5	30	31.7	1,220	25.7	27.1	28.1	1,080	
Central America	9	3.5	1	11.2	12.2	12.7	1,140	10.1	11	11.3	1,010	
South America	1.9	2.2	2	26.3	26.9	29.3	800	23.7	24.3	25.9	710	
Africa:	4.9	8	3	32.2	33	37.3	600	29	29.8	33	530	
North Africa	1	10.3	1	8.9	9	10	460	8	8.1	8.9	410	
Sub-Saharan Africa	6.4	7.2	2	23.3	24	27.3	670	21	21.7	24.2	590	
Middle East:	1	12.8	5	59	59	67.7	1,160	52.3	53.3	59.9	1,030	

Source: UN World Tourism Organization (2018), *UNWTO tourism highlights*, 30th August

Table 2.3 Africa: International tourist arrivals and tourism receipts (for selected years)

Series	International tourist arrivals					International tourist receipts					
	Change (%)					Share (%)					
	(1000)	2010	2016	2017*	17*/16	16/15	17*/16	2017*	2017*	2017*	Share %
Africa		50,426	57,747	62,722	7.8	7.8	8.6	100	37,320	37,320	100
North Africa		19,682	18,895	21,717	5.0	5.0	14.9	34.6	10,009	10,009	26.8
Algeria	VF	2,070	2,039	2,451	19.2	19.2	20.2	3.9	209	..	..
Morocco	F9	9,288	10,332	11,349	1.5	1.5	9.8	18.1	6,703	6,549	19.9
Sudan	TF	495	800	..	8.0	8.0	..	..	94	1,009	2.8
Tunisia	TF	7,828	5,724	7,052	6.8	6.8	23.2	11.2	2,645	1,236	3.5
Sub-Saharan Africa		30,743	38,853	41,005	9.2	9.2	5.5	65.4	21,218	24,024	73.2
Angola	TF	425	397	..	-32.9	-32.9	..	..	719	623	..
Benin	TF	199	267	..	4.7	4.7	..	..	149	123	..
Botswana	TF	1,973	..	..	..	..	..	..	510	578	1.9
Burkina Faso	THS	274	152	143	-6.7	-6.7	-5.9	0.2	72	122	..
Burundi	TF	142	187	..	42.7	42.7	..	..	2	2	..
Cameroon	TF	569	..	..	..	..	..	..	159	505	..
Cabo Verde	THS	336	598	668	15.1	15.1	11.6	1.1	278	370	1.2
Central African Republic	TF	54	..	..	..	..	..	..	11	..	..
Chad	THS	71	..	..	..	..	..	..	..	..	..
Comoros	TF	15	27	28	13.6	13.6	4.5	0	35	..	..
Congo	THS	194	211	..	-4.1	-4.1	..	..	27	..	..

(continued)

Table 2.3 (continued)

	International tourist arrivals						International tourist receipts					
	Series	(1000)			Change (%)			Share (%)	(US\$ million)			Share %
		2010	2016	2017*	16/15	17*/16	2017*		2010	2016	2017*	
Côte d'Ivoire	VF	2,521	1,583	1,800	9.9	13.7	2.9	201	379	..	..
Democratic Republic of Congo	TF	81	351	..	-0.8	..	..	11	4.3	..	..
Djibouti	TF	51	..	..	..	..	..	18	33	..	..
Equatorial Guinea	..	..	..	..	..	..	..	..	..	..	..
Eritrea	VF	84	142	..	24.6	..	...	..	48	..	..
Ethiopia	TF	468	871	..	0.8	..	..	522	346	434	1.2
Gabon	TF	..	..	..	..	..	..	..	..	..	..
Gambia	TF	91	161	..	19.3	..	..	74	116	..	..
Ghana	TF	931	..	..	..	..	..	620	846	850	2.3
Guinea	TF	12	60	..	71.4	..	..	2	16	..	..
Guinea-Bissau	TF	22	..	..	..	..	..	13	19	..	..
Kenya	TF	1,470	1,268	1,364	13.8	7.6	2.2	800	824	926	2.5	
Lesotho	TF	414	..	..	..	..	..	23	48	23	0.1
Liberia	..	..	..	..	..	..	..	12	..	..	..
Madagascar	TF	196	293	255	20	-12.9	0.4	309	750	..	..

(continued)

Table 2.3 (continued)

	International tourist arrivals						International tourist receipts					
	Series	(10000)			Change (%)			Share (%)	(US\$ million)			Share %
		2010	2016	2017*	16/15	17*/16	2017*		2010	2016	2017*	
Malawi	TF	746	849	..	5.5	..	..	31	26	31	0.1
Mali	TF	169	173	193	8.8	11.6	0.3	205	200	..	..
Mauritania	TF	..	..	..	..	..	..	..	30	23	0.1
Mauritius	TF	935	1,275	1,342	10.8	5.2	2.1	1,282	1,572	1,748	4.7	
Mozambique	TF	1,718	1,639	..	5.6	..	..	108	108	151	0.4
Namibia	TF	984	1,469	..	5.8	..	..	438	307	188	0.5
Niger	TF	74	152	..	13.2	..	..	105	77	..	..
Nigeria	TF	1,555	1,889	..	50.5	..	..	576	1,070	2,549	6.8
Reunion	TF	421	458	508	7.5	10.8	0.8	392	360	401	1.1	
Rwanda	TF	504	932	..	-5.6	..	..	202	390	438	1.2
São Tomé and Príncipe	TF	8	29	..	13.3	..	..	11	69	66	0.2
Senegal	TF	900	..	..	..	..	..	453	..	..	..
Seychelles	TF	175	303	350	9.8	15.4	0.6	343	414	483	1.3	
Sierra Leone	TF	39	54	..	125.7	..	..	26	41	..	..
Somalia	TF	..	..	..	..	..	..	..	..	..	..

(continued)

Table 2.3 (continued)

	International tourist arrivals					International tourist receipts					
	Series	(1000)			Change (%)	Share (%)	(US\$ million)			Share %	
		2010	2016	2017*			2010	2016	2017*		
South Africa	TF	8,074	10,044	10,285	12.8	2.4	16.4	9,070	7,970	8,818	23.6
Swaziland	TF	868	947	921	8.5	-2.7	1.5	51	13	..	..
Tanzania	TF	754	1,233	..	11.7	..	..	1,255	2,132	2,339	6.3
Togo	THS	202	338	496	23.8	46.7	0.8	66	..	..	..
Uganda	TF	946	1,323	..	1.5	..	..	784	1,060	918	2.5
Zambia	TF	815	956	..	2.6	..	..	492	683	653	1
Zimbabwe	VF	2,239	2,168	2,423	5.4	11.8	3.9	634	890	..	..

Source: UN World Tourism Organization (2018), *UNWTO tourism highlights*, 30th August

Series of international tourist arrivals

TF = International tourist arrivals at frontiers (overnight visitors, i.e. excluding same-day visitors)

THS = International visitor arrivals at frontiers (tourists and same-day visitors)

TCE = International tourist arrivals at hotel and similar establishments

TD = International tourist arrivals at collective tourism establishments

VD = Departures of tourists (overnight visitors, i.e. excluding same-day visitors)

* = Provisional figure or data

.. = Figure or data not (yet) available

I = Change of series

n/a = Not applicable

. = Decimal separator

, = Thousands separator

For individual countries and territories, information reflects data as reported by national or international institutions up until August 2018. For the latest tourism data and trends, please refer to the UNWTO World Tourism Barometer at mkt.unwto.org/barometer. For tourism statistics online and for data on previous years, see the UNWTO e-library at www.e-unwto.org. For main concepts, definitions and classifications for the measurement of tourism, please see *International Recommendations for Tourism Statistics 2008 (IRTS 2008)* at statistics.unwto.org/content/irts-2008

uninterrupted growth in arrivals for eight straight years. This demand characteristic suggests, first, that global tourism is still a high-volume industry and, second, growth in arrivals was echoed by a strong increase in exports generated by tourism, which reached US\$ 1.6 trillion in 2017, making tourism the world's third-largest export sector (Busiweek, 2019). UNWTO's long-term perspective put the forecast of 3.8% per year for the period 2010.

It is further shown (Table 2.2) that US\$ 1.3 trillion (excluding international fare payments of US\$ 240 billion) were generated in global tourism receipts in 2017 (5% higher than 2016). It can be said that global tourism is again a major feature in the world economy. In conclusion, these strong 2017 results were driven by sustained travel demand for destinations across all world regions, including a firm recovery by those that have suffered from security challenges in recent years. Strong outbound demand from virtually all source markets, including rebounds from major emerging economies Brazil and the Russian Federation, benefited both advanced and emerging destinations (Busiweek, 2019).

2.3.2 Regional Context

Regional trends can also be discerned from Tables 2.1 and 2.2. The indication (Table 2.1) is that Africa (9%) led the growth ranking in 2017, followed by Europe (8.4%), while Asia (5.6%), the Middle East (4.6%) and the Americas (3.3%) also recorded sound results. The Middle East led growth in tourism receipts with a 13% increase in 2017, followed by Africa and Europe which both recorded 8% growth. Receipt grew 3% in Asia and the Pacific and 1% in the Americas. Europe recorded the highest growth in absolute terms, with an increase of US\$ 60 billion to reach US\$ 612 billion, or 38% of the world's international tourism receipts.

2.3.3 African Context

Within Africa, international tourist arrivals in 2017 increased by 9% and tourism receipts at the same level (+8%) (Table 2.3). Results were driven by the continued recovery in North Africa and the solid growth in most destinations that reported data. Tunisia continued to rebound strongly in 2017 with a 23% growth in arrivals, while Morocco also enjoyed better results after weaker demand in the previous year. Growing demand from European source markets and a more stable environment contributed to the sub-region's positive results. In sub-Saharan Africa, strong performance continued in large destinations like Kenya, Côte d'Ivoire, Mauritius and Zimbabwe. The sub-region's top destination, South Africa, reported slower growth in arrivals though a strong increase in receipts. Island destinations Seychelles, Cabo Verde and Reunion, all reported double-digit growth in arrivals, benefiting from increased air connectivity.

2.3.4 *Trend Analysis*

The preceding trend patterns, as described, form the basis for analysis here, since such trends are a necessary and influencing parameter to analyse African prospects, prompting these reflections. First, the statistics illustrate the nature and scope of international tourism in Africa and the significance of tourism in some countries, which is clearly influenced by the broader nature of economic development. Second, there are considerable variations in the scale of tourism development in Africa, from the dominant (i.e. developed) in theoretical development continuum to the Johnny-come-lately (i.e. least developed or late starters). As seen, some countries in the continent, for example, Kenya in the east, Mauritius and the Seychelles in the Indian Ocean, Morocco and Tunisia in the north, South Africa and Zimbabwe in the south, Ghana and Senegal in the west are well-established, 'successful' tourism destinations. There are others like Nigeria, Cameroon, Eritrea and Sierra Leone, which for a number of reasons have limited tourism development and therefore have not made the table league of major players in tourism and have limited tourism development but considerable potential.

Third, the statistics further highlight possible underlying reasons why there is relatively little tourism in some countries and more in others. The dominance of countries of North Africa, e.g. Morocco, is explained not only by the sub-region's proximity to the major European generating markets but, more importantly, by its long-standing economic, political and other ties with these areas. There was also the suggestion back in 1972 that North Africa is '... simply a natural extension of European resorts, in the path of the inevitable southern push towards the sun and, initially at least, towards less crowded beaches' (Hutchinson, 1972: 45). It is further argued, on a wider scope, with respect to many less developed countries that 'where foreign enterprises were present in a country's tourist industry they would be the most successful ...' (Britton, 1982: 340). This might explain why southern and eastern Africa are, in tourism terms, significant, as the case study of Kenya shows: 'pioneer facilities were in place because Kenya had a vigorous expatriate community which sought to advance foreign commercial interests, including tourism' (Dieke, 1993: 13).

In relation to those 'Johnny-come-lately' (or late starter) countries in Africa, some critics might argue, albeit harshly, that the problems in Africa's tourism are closely related to structural imbalances in their overall development pattern. There are no clear strategies for development, in general, or for tourism, in particular, and tourism has not been integrated with other economic sectors. As a consequence, where tourism development in some countries has been insufficient or neglected (as in Cameroon and Nigeria), in others (for example, Kenya) it has been uncontrolled and excessive. Organization of the tourism sector has been inadequate, which has contributed to a lack of profitability in many operations, and promotion prospects are poor, with massive reliance on expatriate staff. Above all, the major setback is inadequate training. For the purposes of this chapter, this profile, in brief, clearly

influenced by the wider nature of economic development (Emeraldinsight, 2019), provides a framework within which to examine other tourism issues in the region.

2.4 Some of Africa's Tourism Issues for Consideration

There are a number of general development issues that can be associated with tourism in Africa, about which so much has been written (Dieke, 2000, 2013). The issues stem from several factors, including: (1) the general disappointment with the economic returns from the tourism sector; (2) insufficient knowledge of the market mix of international tourism; (3) the social and political discontent with tourism and, in particular, the market-driven nature of the sector; (4) the inability of governments, because of their bureaucratic structure, to react to market changes or market signals; (5) the lack of human resource availability and (6) general level of development of the region.

No attempt will be made in this chapter to pursue these issues in detail. Instead, discussion will centre on general factors that influence the global tourism trends noted above. The demand determinants are really of two components: economic and non-economic. Given that tourism is essentially a leisure activity (excluding the important business travel market), these conditions not only influence global tourism trends but also have specific impacts on Africa.

2.4.1 Economic Factors

Tourism is an export leisure activity which is heavily influenced by economic conditions in the main tourist generating regions, which are primarily the United States and Europe. When these economies are buoyant, there is a correlation between disposable per capita income levels and the propensity to travel. In the current circumstances, when the United States and European Union economies are both suffering from economic uncertainty and rising unemployment rates, people are cautious about committing themselves to travel and holiday expenditure. Although there is evidence that consumers give a higher protection to potential travel and holiday expenditure in their annual budgets, economic downturns do affect outbound travel.

2.4.2 Personal Threats

As a general proposition it can be said that perceived threats to tourists will decrease international tourism flows and cause a substitution effect. For example, the terrorism incidents in the United States have not only drastically decreased the number of residents and citizens travelling outside the country (international tourism) but have

caused many not to forgo their holidays but rather to take their holidays within the United States (domestic tourism). Some of these personal threats can be classified as follows.

2.4.3 Security

Tourists will not travel to countries or areas within large countries where they feel threatened. Some relatively recent examples are the 11 September 2001 events in the United States, the bombing in Bali on 12 October 2002 and the Iraq war of March 2003 (and ongoing). When such events occur, there is an immediate and often massive dislocation to country and regional travel.

2.4.4 Health

The outbreak of the SARS virus, the AIDS pandemic and the outbreak of bubonic plague in India some years ago had a major influence on both the volume and direction of international tourism flows.

2.4.5 Natural Disasters

There are many examples, including floods (Central and Eastern Europe in 2002), foot-and-mouth disease in the United Kingdom in 2002 and bird flu in Hong Kong and parts of China in 2002. A combination of economic decline, together with some of the circumstances described will have immediate effects on personal travel plans and business travel. Unfortunately, as tourism is a multi-sector activity, there will be collateral affects. These we can observe in the global airline industry, hotels and in other tourism-related activities. These are very difficult times for tourism businesses and some will not survive the current crisis. However, for those that survive, there is some good news. Historical analysis shows us that tourism crises do not last long. For example, the first Iraq war in 1991 devastated regional travel, but visitor arrivals had generally recovered by 1993. The Asian financial crisis beginning in Thailand in 1997 had serious implications for the region but had bottomed-out by 1999 and tourism in many countries had recovered. The Luxor Temple massacres in Egypt abruptly stopped tourism inflows, but increased security measures and massive advertising restored tourism trends within 2 years. Recovery periods can be quicker but, in general, seem to average around 18 months.

A problem in one country may benefit another, as many tourists do not forgo their holiday but rather substitute a perceived 'dangerous' destination for a 'safe' one. However, if a region is considered to be politically unstable or threatening in

any way, tourists will tend to avoid it. Over the long term this explains why regions such as Africa, South Asia and the Middle East have received only a small share of international tourist arrivals.

2.4.6 Human Resource Availability

In most developing regional countries, Africa inclusive, there is usually no shortage of people available for work but rather the problem is of the levels of skills available (Jenkins, 1997). Unlike finance which can be borrowed, human resource development is a continuing process and its direction and focus should relate to a country's development objectives. Some of this objective might be general—for example, to increase the proportion of literate people in the country. In other cases, the development of human resources may be related to the needs of a particular sector such as tourism (introduction of hotel and catering schools, tourism industry training for employment in tour operations and travel agencies.) In the short term, a country can overcome these shortages of skills by importing foreign workers, but in the medium term this solution will give rise to repatriation of currency and possibly economic and social problems where foreign workers are seen as filling jobs which locals should be doing (Dieke, 2001). This is a difficult area and it is always advisable to have a specific human resources development plan for the tourism sector because of the wide range of social and other skills required.

Given this brief tour of issues the question now arises: what Africa can do to develop its tourism potential?

2.5 Prospects for Africa's Tourism

In looking to the future, there are a number of factors that will support Africa's international tourism development.

2.5.1 First, the Three 'As'

It is now generally accepted that prerequisites for tourism development are attractions, accommodation and access. Without attractions—either natural (climate, landscapes, coast, mountains) or man-made (historic sites, theme parks, festivals)—tourism cannot develop. A combination of these attractions often put destinations on the tourism map. Las Vegas is the quintessential man-made destination and Egypt is an example of a country that has benefited from its history and culture. When at the site the tourist needs support services, particularly accommodation. Even if both are available, there has to be good access to the destination. Many international tourists

today are described as being ‘cash rich and time poor’. Direct access to a destination by road or air is an important factor in development, as it saves time on travelling by indirect routes. In Africa there are many top-quality natural and man-made attractions, high standards of accommodation and infrastructure and a good transportation network; the basics for tourism development are in place and are being added to and improved all the time.

2.5.2 Second, Growing Regional Competition

The many regional countries (including Africa) now entering the international markets are providing a wider range of destination options for tourists. Competition will ensure that standards and value for money will eventually determine which countries and destinations will be most successful. An important consideration here will be how to improve service standards in a world where tourists are becoming more frequent travellers and accumulating tourism experience, which allows them to determine value-for-money destinations and to compare service standards. In the long-term, the availability of trained human resources may be the determining factor between success and failure of tourism investment. At present, much of the labour force in tourism is expatriate. Any programme to facilitate indigenous employment will require careful planning, a change in cultural perceptions and encouragement from the political hierarchy.

2.5.3 Third, Investment Capital

In some of the African countries there is no shortage of investment capital, but perhaps a reluctance to invest in the tourism sector. To a large extent such caution is linked to current experience where growth in tourism has been slowed, and in some cases, stopped by the ‘threats’ described earlier. However, our trend data has demonstrated that in the medium and long term, tourism is a robust industry and one that has greater sustainability than others. Creating a destination in a highly competitive market is not a short-term objective, it is essentially an incremental activity just like development in general. The strategic vision has to be long term, and the huge investment in infrastructure is a long-term commitment without which tourism will not develop.

2.5.4 Fourth, the Private Sector

Most of the regional infrastructure has been provided by governments. This reflects the fact that infrastructure is capital intensive, fixed and has a long-term payback period in financial terms. These conditions limit the interest of the private sector in

investing in this area. More attention is being given now to public–private partnerships in which the government is building the infrastructure to facilitate the private sector’s providing facilities for tourists (and other users). As risk-takers, the private sector companies will only invest in areas where viable returns are expected from the investment. They are in the marketplace and their survival depends on their understanding of the market and, in particular, what the client wants and for what he is prepared to pay. In the region, there are signs that governments are moving to a more supportive and facilitating role in the tourism sector and leaving the development to private companies. This does not mean that governments only have a supportive role in the sector; as representatives of the people, government is the ultimate arbitrator of many of the important considerations in the sustainability of the industry, such as what type of tourism should be developed, where and on what scale (see Jenkins, 1994).

2.5.5 Fifth, the Environment

Environmental quality is a factor that has reached a worldwide audience. It is fundamental not only to the development of tourism but also to the lives of residents. There is some evidence that many tourists are reflecting their concern for the environment in their choice of destinations. Those destinations offering environmental quality can often charge higher or premium prices for services, but it may be that in the longer term, destinations that have deteriorated environments will not be competitive at all. Again, there is evidence in many global regions that environmental management is now regarded as an integral part of development planning.

2.5.6 Sixth, Market Demand

Despite the impressive growth trends in international tourism, the market is very under-developed. Using the UN World Tourism Organization’s statistics, only 3.5% of the world’s population travels internationally. Even in the United States, one of the richest countries in the world, less than 10% of the population has passports. The longer term potential for greater penetration of this market exists. Of course, to constitute a market, people must have disposable income to afford to travel, but as per capita disposable income increases people to travel more. Initially, travel is domestic, then intra-regional and eventually, long-haul international. Best estimates of all travel show that 80% is domestic and 20% is international. To emphasize the importance of some domestic markets, it is interesting to note that in 2000, the UN World Tourism Organization estimated international tourist arrivals to be 693 million; in China alone, domestic tourism movements were estimated to be in excess of 700 million. The question of what might be the constraints on future demand is

outside the scope of this chapter, but one can safely predict that there is a growing and largely untapped market for tourism.

2.5.7 Seventh, Education and Training

This topic has been mentioned above. Any development of the tourism sector must involve consideration and analysis of the present and future human resources position (Emeraldinsight, 2019). Specific training programmes and human resource development initiatives will be required. To reduce dependence on and eventually minimize reliance on foreign labour require careful planning and focus (Dieke, 2003). In an era where it is now fashionable to talk of ‘lifelong learning’ and where technology is fast-changing, human resource development is a continuous programme which requires adequate budget allocation. It is important to emphasize, again, the importance of training in a wide range of skills, including management and information technology. This should not be confined to the formal education system. While formal training is obviously important, it may often be more beneficial and more cost-effective, in practice, to focus on informal training, either on-the-job or through programmes carefully tailored to meet defined objectives and targeted at specific types of individuals (Doswell, 2000).

If financial leakages arising from the employment of foreign nationals, especially by transnational corporations (TNCs), are to be minimized, governments and the private sector should collaborate in the formulation of policies and strategies to develop indigenous capabilities. If governments provide appropriate incentives, for example, TNC could develop training programmes for their African staff abroad or organize in-service training for them.

2.6 Conclusion

This chapter has dealt with some aspects of Africa’s prospects in the globalized tourism economy, namely, the role that global tourism has played and will play in the continent’s development process. The main emphasis has been on the implications of using tourism as a viable development option. There are a number of issues that might threaten such prospects. Unless these challenges are addressed, they might further undermine or erode the progress already made, in general development terms, given that ‘development’ is not immediate but is incremental. They will further marginalize Africa in the global ‘pleasure periphery’. Suggestions have been made as to how some of these challenges might be overcome. Particular reference has been made to areas that appear promising for the effective and sustainable development of the sector, including the need for basic facilitating investment in tourism—attractions, accommodation and access; the importance of respecting and appreciating the relative roles of both the private and public sectors; the need for continued investment

in the sector and the significance of the growing regional competition. If any single idea could guide tourism in Africa to be sustainable, tourism ‘must be profitable to the communities to compensate for any dislocation of everyday life; it should gain the acceptance of the communities in relation to the type, scale and location of tourism development and planners should consider the need for protection of certain communities and sites and to meet their acceptable cultural standards’.

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