OVERVIEW OF TOURISM TO AFRICA

with reference to the Asian and Japanese outbound markets

A FOLLOW-UP STUDY TO
THE FIFTH AFRICA-ASIA BUSINESS FORUM

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TICAD IV
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UNWTO • OMT • ЮНВТО

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Acronyms

AABF	Africa-Asia Business Forum
ADS	Approved Destination Status
CRM	Customer Relationship Management
DMC	Destination Management Company
DMO	Destination Management Organization
FIFA	Fédération Internationale de Football Association
FIT	Fully Independent Traveller/Tour
GDP	Gross Domestic Product
ICT	Information and Communications Technology
MoU	Memorandum of Understanding
SEO	Search Engine Optimization
TFCA	Trans Frontier Conservation Area
TICAD	Tokyo International Conference on African Development
TTCI	Travel and Tourism Competitiveness Index
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organization
UNOSAA	United Nations Office of the Special Adviser on Africa
UNWTO	United Nations World Tourism Organization
WEF	World Economic Forum
WTTC	World Travel and Tourism Council

Glossary of Terms

Traveller	Anybody who moves between different geographic locations for any purpose and any duration.
Visitor	A traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed in the country or place visited.
Tourist	A visitor who stays over for at least one night. A tourist can be a domestic tourist (i.e. a resident of a country who travels away from his/her residence in the same country and stays at least one night) or a foreign tourist (i.e. a resident of one country who travels away from his/her residence to another country and stays at least one night). Tourists travel for different purposes including business, leisure, conferences and incentives.
Tourism	The activity of visitors.
Travel and Tourism	The term used by the World Travel and Tourism Council (WTTC) to describe tourism and defined as the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not remunerated from within the place visited. The phrase "usual environment" is introduced to exclude from the concept of 'visitor' persons commuting every day between their home and place of work or study, or other places frequently visited.

Executive Summary

Background

There is no doubt that tourism provides Africa with major socio-economic opportunities given the pro-poor nature of the industry and the abundance of the continent's nature and culture resources. However, tourism is an increasingly competitive industry and successful tourism industries require excellent planning and management.

This study was developed as a collaborative effort of the UNDP and the UNWTO in response to the policy recommendations issued at the fifth Africa-Asia Business Forum (AABF V) and the acceleration of the implementation of the Yokohama Action Plan[1] in the area of tourism development, including recommendations to address constraints to tourism development, support tourism operators to increase familiarization with African destinations, take advantage of the opportunities provided by the 2010 Fédération Internationale de Football Association (FIFA) World Cup in South Africa; and support long-term tourism promotion. The findings contained in the study are based on desk research, in-depth interviews with approximately 30 opinion leaders in six selected African countries and electronic questionnaire interviews with 47 leading tour operators to Africa in eight key African source markets. The contents of this report reflect the views of the author and do not necessarily reflect the views or policy of the Government of Japan, the United Nations Development Programme, or the United Nations World Tourism Organization.

Africa's tourism economy and performance

Travel and Tourism in Africa has a very small share of the global tourism economy.

Despite the continent's wealth of natural and cultural attraction the relative performance of tourism in Africa lags behind the global average.

The contribution and importance of Travel and Tourism differs significantly between North (Mediterranean) Africa and sub-Saharan Africa. In North Africa tourism is already the most important generator of economic development and jobs, while sub-Saharan Africa has a long way to go to capitalize fully on the continent's tourism potential, with the relative performance of travel and tourism ranking last of 13 world regions[2].

The four main destinations in Africa, namely Egypt, South Africa, Morocco and Tunisia account for 73% of tourism receipts and all four of these countries experienced good growth in tourism receipts during the period 2003-2007 following slower growth period during the early millennium years.

The UNWTO Vision 2020 for Africa forecasts a growth in Africa's share of global tourism arrivals from 3.6% in 1995 to 5% in 2020. While there has been a

[1] An action plan announced at the fourth Tokyo International Conference on African Development held in Yokohama in May 2008.

[2] Regions are the Caribbean, Central and Eastern Europe, European Union, Latin America, Middle East, North Africa, North America, Northeast Asia, Oceania, Other Western Europe, South Asia, Southeast Asia, sub-Saharan Africa

downward spiral in global tourism arrivals since the second half of 2008, UNWTO forecasts that tourism to Africa will remain stable with a growth of between 1% and 5% during the latter part of 2009. The impact of the 2010 FIFA World Cup is expected to mitigate the effects of the tourism slowdown in sub-Saharan Africa.

Other external factors that could have a major impact on Africa's tourism potential are the continent's perceived poor track record in the areas of safety, security and health. The interviews conducted with tourism opinion leaders and major tour operators to Africa have confirmed the critical importance of these two factors on tourism performance and sustainability.

Market structure

Arrivals from within Africa and from Europe account for almost 80% of all tourism arrivals to African countries, with Asia having a small market share of approximately 3%. Sub-Saharan Africa is heavily dependent on arrivals from African countries. Source markets vary considerably among the various African countries and historical ties and language have a major influence on the source market mix attracted.

Seven broad market segments are identified for consideration by African destinations, depending on their product strengths. These are; family relaxers, independent relaxers, luxury discoverers, packaged discoverers, mature explorers, adventurous explorers and special interest markets. The relaxer segments prefer beach holidays and city breaks, the discoverers want new experiences with basic comfort such as luxury safaris and general tours and the explorer markets prefer off-the-beaten track experiences such as culture and nature exploration and community-based tourism experiences.

Key market drivers for unlocking Africa's market potential are an improved image and perception of Africa; reduced travel costs (i.e. air travel, ground transport, etc.) and improved distribution and sales channels (i.e. diversity of products being sold in the travel channel, improved internet connectivity, etc.).

Regarding the Japanese market to Africa, tourism arrival figures indicate that the Japanese outbound market is in a declining phase following the travel boom of the 1990's. Despite this trend key destinations in Africa such as South Africa, Tunisia, Zambia and Madagascar have experienced good growth between 2003 and 2007. Declining figures from Japan were recorded in most destinations during 2008.

Market research and segmentation conducted by South African Tourism identified specific Japanese target market segments as most suitable for South Africa based on a) segment value which measures the growth potential of size and scope of market segments, and, b) ease of conversion of the growth potential into actual tourism yield based on a variety of indicators including access, security, volume, expenditure, and, seasonality amongst others. The specific Japanese target market segments identified included the more adventurous "Wanderlusters", "Next Stop South Africa" tour market and "Senior Explorers".

Africa's tourism competitiveness

The World Economic Forum's Tourism Competitiveness Index measures the tourism competitiveness of 133 tourism countries. The index recognizes Africa's tourism competitiveness as being vested in its authentic, often undisturbed and ancient natural and cultural treasures.

All regions in Africa offer a range of unique natural and cultural assets, ranging from the ancient cities, unique architecture and desert adventures of North and West Africa to the jungles and rivers of Central Africa, the mountain peaks, wildlife migrations and origins of mankind in East Africa and stunning scenery, city settings and wilderness experiences of Southern Africa.

However, only four African countries rank among the world's top 70 tourism competitors and eight of the ten least competitive countries are from Africa.

Unlocking Africa's tourism treasures will not only require an image shift of potential destinations in Europe, Asia and North America, but also major improvements in various areas of the tourism value chain including air access, the range and quality of accommodation and hospitality services, improved air and road access to the many exciting destinations and attractions, improvement of local supply linkages for industry goods and services and improved communication and information technology systems. Further analyses of these elements of competitiveness are contained elsewhere in the report.

The tourism business environment also needs to be improved, with personal welfare including visitor safety and security, hygiene and health services topping the list of priorities in this regard.

Developing tourism countries in Africa are in need of a major skills improvement drive. Pockets of exceptional quality and skills exist, however the majority of workers in tourism and hospitality are in need of both hard skills training and visitor relations skills.

While governments in Africa increasingly acknowledge the growth potential and socio-economic value of tourism, the majority of them unfortunately pay lip service to the industry and, apart from the major destinations in Africa tourism, budgets are very limited and leave little scope for creative product enhancement and promotion.

Some countries e.g. South Africa, Tunisia, Egypt, Mali, etc. offer tourism incentives in various forms such as tax advantages, land concessions, marketing assistance schemes, cash subsidies, business financing and skills development incentives.

Major tourism initiatives

Two key tourism initiatives are identified with potential of advancing sub-Saharan Africa's tourism potential over the next few years, namely i) the 2010 FIFA World Cup, expected to attract almost 360,000 foreign visitors and approximately US$ 9 billion in expenditure to Southern Africa during 2010 and ii) the Transfrontier Conservation Areas or Peace Parks initiative, which will open up a range of expanded parks across sub-Saharan Africa, offering visitors the opportunity of easy access to nature experiences across country border.

With Japan, Korea Republic, Australia and Korea DPR having already qualified to participate in the 2010 FIFA World Cup, the tournament clearly offers Africa a tremendous opportunity of generating increased visitor numbers and awareness in Asia. African countries will also have the opportunity of learning about Asian travel preferences and requirements.

While the majority of direct activities will accrue to South Africa as the host country, various opportunities exist for African countries to capitalize on attendance and coverage of the event i.e. promotion opportunities, travel trade education, media coverage, accommodation provision in South Africa's neighbouring countries, pre- and post match trips and art and craft sales and exports, to name a few.

The business of tour operating in Africa

An online survey conducted among a sample of international tour operators in eight Africa source markets rendered a response from 47 major international tour operator companies that manage tours to Africa.

The survey revealed substantial differences in the type, size, composition, operational structure and preferences of tours from Japan and those from markets in Europe and the USA.

Nature tours and safaris is the main purpose of travel to Africa for 60% of operator clients, with cultural tours, sun and sea holidays, general touring and special interest activities comprising the rest. This composition differs among Japanese visitors with only 40% travelling primarily for nature and wildlife, with a significant 36% and 16% respectively preferring general touring and special interest experiences.

Compared to visitors from Europe and the USA, Japanese visitors generally travel in larger groups, prefer higher levels of organization, travel for much shorter periods and make more use of traditional distribution channels in transacting with Africa.

Operators from all countries make extensive use of inbound Destination Management Companies (DMCs) in arranging visits to Africa.

Word-of-mouth and customer relations are paramount in promoting and selling African tourism, with internet information playing an increasingly important role, mostly for information and planning rather than for transacting.

Operators rate nature and culture experiences in Africa particularly high, with accommodation and food quality and overall appeal to market preferences also rated highly. Ease of access and movement, safety and security and government support for tourism are rated poorly.

Japanese operators gave safety and security and ease of access and movement much lower scores than their counterparts in Europe and the USA.

The majority of respondents rate the growth in both passenger numbers and revenue to Africa as exceeding those of other destinations in their portfolios. The indication by operators that growth in volumes has outstripped growth in revenues is indicative of customers trading down in favour of more affordable travel options. This may be due to the worsening economic situation during the latter half of 2008 and first half of 2009.

Concerning the most important challenges facing destinations in Africa respondents overwhelmingly selected safety and security as the most important challenge. Other important factors mentioned, although being of rated as of lower importance than safety and security are improved airline access and improved government budgets for tourism promotion.

Japanese operator responses follow a similar pattern, however improved health and hygiene is rated the second most important challenge after safety and security and ease of immigration and visa requirements also scored high.

In summary, 57% of respondents rated Africa's tourism growth potential as moderate, with an encouraging 32% rating it as major. Only 11% of respondents rated it as poor.

Some concluding important findings and recommendations for Asian outbound companies wanting to enter Africa are:

- The lack of knowledge among African tourism industry players regarding the travel behavior, preferences and requirements of Japanese travelers;
- The need for tour companies participating in the 2010 FIFA World Cup to join forces in exposing host industries and communities to the needs of the Japanese market and raising awareness of Africa among Japanese travelers;
- The possibilities for combining the highlights of more than one country in cross-border packages to cover more of Africa's highlights;
- Acknowledging and responding to the specific interests and travel preferences of Japanese travelers, which differ from those of mainstream African travel markets in Europe and North America;
- The need for Japanese operators to "dig a bit deeper" to uncover some of Africa's hidden treasures e.g. cultural traditions and rituals, birdlife, water bodies, etc. and gaining a competitive edge in doings so;
- The need for Japanese companies to conduct a thorough investigation of possible government assistance schemes when entering the African market;
- The importance of providing clients with reliable and factual information regarding issues such as personal safety precautions, disease prevention, water quality, etc.
- The need for careful itinerary planning to cover the highlights without over-burdening travel schedules, given the relatively short duration of Japanese trips;
- Acknowledging that developing destinations in Africa are better equipped to accommodate small travel parties and marketing Africa accordingly;
- The importance of securing the services of an experienced ground handling partner when entering the African marketplace.

- The need for good Japanese tour leadership with knowledge of Africa, especially when entering new destinations where language barriers are considerable.
- The importance of proactive training of staff at locally contracted services such as hotels, tourism attractions, etc. and equipping them with knowledge and understanding of Japanese customer preferences and operator requirements.
- The need for exposing travel agents selling African tour programmes to African travel experiences through workshops and familiarization trips.

The report concludes with detailed findings of interviews conducted with tourism opinion leaders in six Africa countries, as well as a directory of key tourism associations in Africa.

1. Introduction

1.1 The importance of tourism for Africa's development

With the global economy increasingly driven by sophisticated technologies and service industries and many countries in Africa struggling to compete in the industrial and high-technology sectors of the global economy, tourism has become a highly suitable priority for economic growth and job creation in many African economies, given that:

- Africa's unique and varied natural and cultural resources bode well for the growing global travel trends towards nature and culture exploration.
- Tourism is a job intensive industry that generates jobs from semi-skilled to managerial levels.
- The tourism industry provides an excellent entry point for development of generic and specialized service skills.
- Tourism generates valuable foreign exchange and acts as an invisible export sector.
- Tourism can have significant pro-poor benefits as it provides a wide range of income-generating opportunities along the value-chain including low/semi-skilled employment for youths and women and facilitates small entrepreneurs to gain market access.
- It should be noted that the tourism turnover trickles down to the poor from supply chains as it enhances the development of and access to a range of basic infrastructure in the poor local communities such as electricity, water and roads.
- Tourism stimulates indirect earnings from non-tourism sectors that supply tourism such as agriculture and transportation.
- Tourism presents partnership opportunities for the poor communities to engage in tourism businesses by making use of resource rights.
- The industry's multiplier effect is large as it brings external income directly to local level allowing such tourism revenues to circulate many times through the local economy. For example, when tourists stay and have a meal at a local guest house, the owner will most probably buy fresh produce from local farmers, pay employees to serve the travelers, possibly have the laundry done by a local person, arrange for a local tour guide, etc. These service providers may spend some of the tourism monies paid to them locally, e.g. to purchase groceries from the local store, purchase furniture of pay school fees, etc. This second tier of recipients will, in turn, spend a portion of such revenues in the local economy, and so it continues circulating through the local economy.
- Well-managed tourism can assist in conserving important natural and cultural assets and traditions through the proper economic assessment of the total value of these resources and generating income for their maintenance and improvement.

- Barriers to entry in tourism are less prohibitive than for technology-driven industries such as manufacturing and mining.
- Tourism is very conducive to small business development and provides opportunities for many types of Small and Medium-sized Enterprises (SMEs) such as tour guides, handicrafts, artists and performance artists, transport and personal services and many more.

While tourism clearly has significant growth potential for Africa, it is a highly competitive industry and its success is increasingly dependent upon:

- A positive and sought after image.
- Safety, security and freedom of movement.
- Easy and affordable visitor access and particular air travel.
- Choice and value for money of accommodation and transport.
- Quality of welcome, service and visitor interaction.
- In addition Africa's environmental and cultural treasures are fragile and utmost care should be taken to conserve, protect and enhance the tourism resource base.

1.2 Study brief: Tokyo International Conference on African Development

The Tokyo International Conference on African Development (TICAD) Process, co-organized by the Government of Japan, UNDP, the United Nations Office of the Special Adviser on Africa (UNOSAA) and the World Bank, foresees an unprecedented opportunity for collaboration between Africa and Asia in trade and investment. The Yokohama Action Plan issued at TICAD IV, held in May 2008 in Yokohama, lays out goals to be achieved and specific measures to be implemented through the TICAD Process over the period 2008-2012. Boosting Economic Growth, one of the three priorities identifies measures of cooperation in the areas of Trade, Investment and Tourism. With the recognition of the critical role that SMEs play in socio-economic growth and development, UNDP, under the TICAD Process, has provided technical support for SME development to African countries through such innovative initiatives as the TICAD Exchange, the Africa-Asia SME Network, and most notably the Africa-Asia Business Forum (AABF).

AABF, a South-South initiative where the Asian experience is replicated with the increasing level of business interests in Africa by Asian companies, aims to attract greater flows of investment into Africa and to increase trade between Africa and Asia. The past AABF series have been implemented by UNDP with funding from the Government of Japan.

AABF V was held under the theme of "Forging Business Linkages for Sustainable Tourism Development in Africa", in Uganda in June 2009. It was designed to foster an interactive policy dialogue between representatives of private and public institutions as well as Civil Society Organizations and facilitate face-to-face negotiations in partnership building between representatives of African and Asian SMEs.

This study was developed as a collaborative effort of the UNDP and the UNWTO in response to the policy recommendations issued at the AABF V detailed in 1.4 below for the acceleration of the implementation of the Yokohama Action Plan in the area of tourism development. The report intends to serve as a reference for policy makers and tourism businesses in realizing the tourism potential in Africa with the focus on the Asian, particularly on Japan's, outbound market by conducting an analysis of the tourism trends, evaluation of tourism products, and review of tour business development practices in Africa.

1.3 Study method

It should be noted that this is a preliminary study completed in a short period. The following methods were employed:

- Desk research analyzing available data, research and other reports referenced.
- Personal visits and interviews with approximately 30 key tourism opinion leaders of five countries namely Tunisia, Mali, Rwanda, Uganda and Zambia; and telephonic interviews conducted with opinion leaders in Cameroon (see Annexure A)
- An online questionnaire survey conducted among 320 leading outbound tour operators from the USA, UK, Germany, Netherlands, France, Italy, Scandinavia and Japan, rendering a response of 47 completed returns (see Chapter 3). Collectively the surveyed operators handle approximately two million passengers worldwide and more than 170,000 passengers per annum to Africa, with an average of approximately 3,500 passengers per operator to Africa.

1.4 Policy Recommendations for the Sustainable Development and Promotion of Tourism in Africa

During the AABF V held in June 2009 in Uganda representatives of 29 African countries and 6 Asian and Middle East countries took note of specific actions to be pursued under the TICAD IV Yokohama Action Plan, including the need to:

- encourage and assist African countries' efforts to address security, hospitality management, infrastructure and environmental constraints to tourism development, including through tourism training programmes;
- support tourism operators to increase familiarization with African destinations and to improve knowledge of the continent and its tourism attractions;
- take advantage of the opportunities provided by the 2010 FIFA World Cup in South Africa; and
- support long-term tourism promotion through events such as travel fairs.

In this context, and in an effort to provide impetus to the implementation of these activities, the participants made the following policy recommendations, emphasizing the importance of uniting and harmonizing all stakeholders under public-private partnerships in a holistic manner:

1. There should be a concentrated focus on the development and promotion of tourism from Asian countries, including Japan, to Africa for the 2010 FIFA World Cup and beyond;

2. A targeted marketing strategy should be identified based on analysis on trends, profile and orientation of potential inbound travelers to Africa;

3. The governments in Africa are encouraged to make use of the various funding facilities available under the Yokohama Action Plan, and other cooperation programmes, to carry out programmes/projects/activities aimed at promoting tourism as an element of boosting economic growth and poverty alleviation while enabling conservation and environmental protection in Africa. Japan International Cooperation Agency (JICA), UNDP, World Bank Group, relevant international organizations such as the United Nations Industrial Development Organization (UNIDO), UNWTO, and partners including within the African continent are ready to support in this regard to build African capacity, at community, destination, national and regional levels. This would include implementation of master-plan studies and feasibility studies on various aspects of tourism, dispatch of tourism development experts and language instructors, mounting of tourism promotion seminars and workshops, production and distribution of educational and awareness-raising materials and community-based pro-poor tourism programs/projects. The "One-Village One-Product" (OVOP) initiative under cooperation by Japan External Trade Organization (JETRO) and JICA should be expanded further for the development and overseas marketing of local products by communities. The programme developed by UNIDO, "One Village Industrial Cluster", an application of OVOP, should complement the OVOP by enhancing productivity of African rural community;

4. The private sector in the African tourism industry should be supported through capacity building, forging of business linkages and public-private partnerships, and access to financial facilities. Relevant institutions including the World Bank Group, UNDP, JICA, the Japan Bank for International Cooperation (JBIC), the African Development Bank and African regional development banks, as well as national and private banks, should actively disseminate information about their applicable facilities to support the private sector both in Africa and Asia to promote tourism in Africa;

5. FDI related to the African tourism industry development should be seriously promoted. The specific focus of such investment should be on the building of international standard hotels and lodges, restaurants, airline services and value addition to African commodities, etc as well as an enabling environment in terms of policy, legal and regulatory frameworks. The private sector of Japan and other Asian countries are encouraged to make use of the various financial facilities especially those made available under the Yokohama Action Plan. UNDP's Growing Sustainable Business (GSB) mechanism should be utilized at the country-level for tourism value chain public-private partnerships projects and other relevant AABF opportunities.

Relevant international organizations such as UNIDO and UNWTO should further make efforts to build capacity of the African tourism sector to attract increased FDI;

6. Recognizing the significance of Africa's own initiative such as the UNWTO programme on sustainable tourism development initiated by Benin, inter-African cooperation should be further promoted;

7. African countries with the support of TICAD co-organizers and other partners should make collective efforts to strengthen regional capacities of all five subregions of the continent so that they can promote, in Japan and other Asian countries, their tourist attractions in the region in clusters;

8. The increase of international air services, including charter services, directly between Asian airports, especially those in Japan, and Africa should be encouraged with a view to capturing the opportunities provided by the FIFA World Cup;

9. Further reconnaissance missions to African countries should be organized preferably before the 2010 FIFA World Cup in order to tap into the tourism potential and to identify new tourist destinations likely to be of interest to Japanese and other Asian tourists;

10. The media from Asia, especially TV broadcasters and popular magazines, should be encouraged to increase coverage of Africa - with special focus on tourism destinations, attractions, UNESCO World Heritage Sites, etc. In this regard, further efforts should also be made by the African community overall to improve Africa's image and promote greater awareness of the continent's many tourism attractions;

11. Security concerns of travelers to Africa should be given utmost attention by all relevant stakeholders in their sustainable development activities and tourism promotion efforts. Travel Information on African countries issued by the governments of Japan and other Asian countries participating in AABF V could take into account the efforts by African countries to promote tourism in respective country, while ensuring safety of travelers; and

12. TICAD co-organizers will monitor the progress of the above-mentioned activities and incorporate it into the tourism development section of annual progress reports on the implementation of Yokohama Action Plan which will be presented at Annual TICAD Ministerial Follow-up Meetings.

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2. Africa's tourism in context

2.1 Africa's tourism economy

Tourism is a substantial contributor to GDP and employment on the continent. The tables below and the results of the World Travel and Tourism Council's (WTTC) simulated satellite account estimates[3] indicate that:

- The Travel and Tourism Industry[4] directly contributes an estimated 3.3 % to GDP and 2.5% to employment in Africa. When considering both the direct and indirect impacts of the industry, the wider Travel and Tourism Economy contributes an estimated 8.3% to GDP and 5.9% to employment in Africa.
- This compares favorably with tourism's direct contribution to the global economy, which is estimated at approximately 3.2% of global GDP and 2.7% of total employment, with the direct and indirect contribution estimated at 9.4% of global GDP and 7.6% of global employment.
- Tourism in Africa represents only an estimated 1.1% of the global travel and tourism GDP; however it is estimated that Travel and Tourism employment in Africa comprises between 6% and 8% of world travel and tourism employment, showing the employment intensive nature of the industry on the continent.

Table 1: Estimated Economic Impact of Tourism in Africa, 2009

2009	North Africa	Sub-Saharan	Total Africa	World
T&T industry as % of GDP	5.3	2.2	3.3	3.2
T&T economy as % of GDP	11.3	6.7	8.3	9.5
T&T industry as % of Employment	5.8	1.7	2.5	2.7
T&T economy as % of Employment	11.2	4.6	5.9	7.6
T&T industry (direct) GDP (US$bn)	29.6	21.9	51.5	1,870.0
T&T industry (direct) employment size ('000 jobs)	2,810	3,338	6,148	77,276
Relative size of direct T&T Industry GDP[a]	1st	11th		
Relative size of direct T&T Industry Employment[a]	1st	12th		

Source: WTTC, 2009 [a] T&T relative size to regional GDP and employment – ranking out of 13 world regions

- There are significant differences in the contribution of tourism to the economies of North and sub-Saharan Africa.

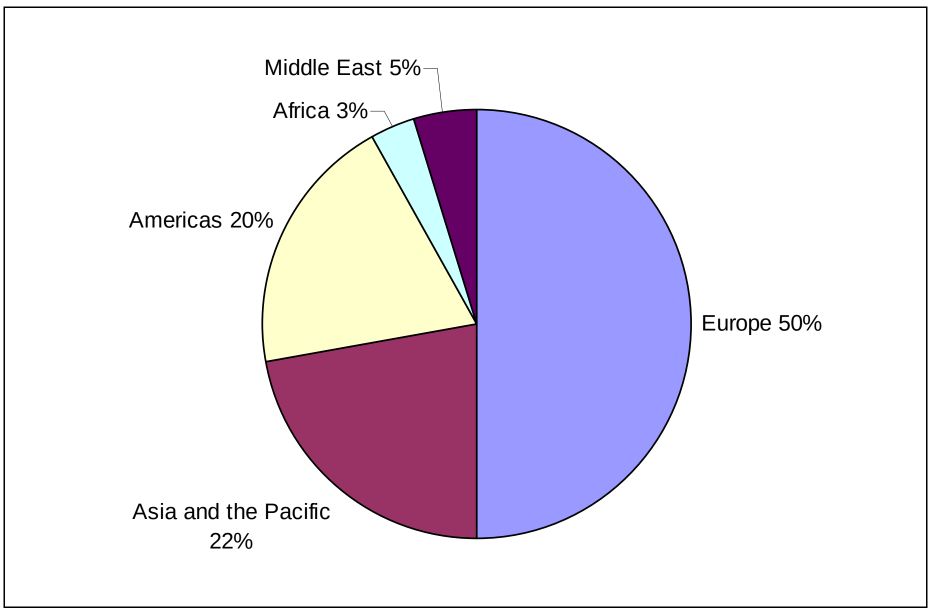
[3] The WTTC uses a *simulated* satellite accounting technique, which is based on the Tourism Satellite Account (TSA) framework but estimates input data from various international and local research sources.
[4] The Travel and Tourism Industry captures the explicitly defined production-side 'industry' contribution of tourism (i.e. direct impact only), for comparison with all other industries, while the Travel and Tourism Economy captures the broader 'economy-wide' impact, direct and indirect, of tourism.

- The tables above and below indicate that North Africa's Travel and Tourism Sector has the biggest relative impact on overall GDP and employment creation of all 13 world regions[5].
- In contrast the relative contribution of Travel and Tourism to the economy of sub-Saharan Africa is the lowest of all world regions and it also ranks low in terms of the real size of the Travel and Tourism industry and economy.

2.2 Current and future performance

- **Africa in the global context**

- Figure 1 below indicates that Africa's limited share of 3.2% of international tourism receipts (i.e. in-country expenditure by foreign tourists) accounted for approximately US$30.2 billion in 2008. The difference in tourism receipts attracted (3.2%) and Africa's tourism GDP share of 1.1% could be ascribed to the high economic leakages and imports in the sector.
- Of this North Africa's share was about 1.1% and sub-Saharan Africa's about 2.1% in 2008.
- *Fig. 1: International Tourism Receipts by Region, 2008 (US$ bn)*



Source: UN World Tourism Organization, 2009

- During the period 2005 – 2007 Africa recorded exceptional growth in tourism receipts of around 9% – 11% per annum compared to global averages of just more than 5%. Only Asia recorded higher growth during the period.
- However, tourism receipts declined by about 2% between 2007 and 2008 compared to a global growth figure of +1.8%.

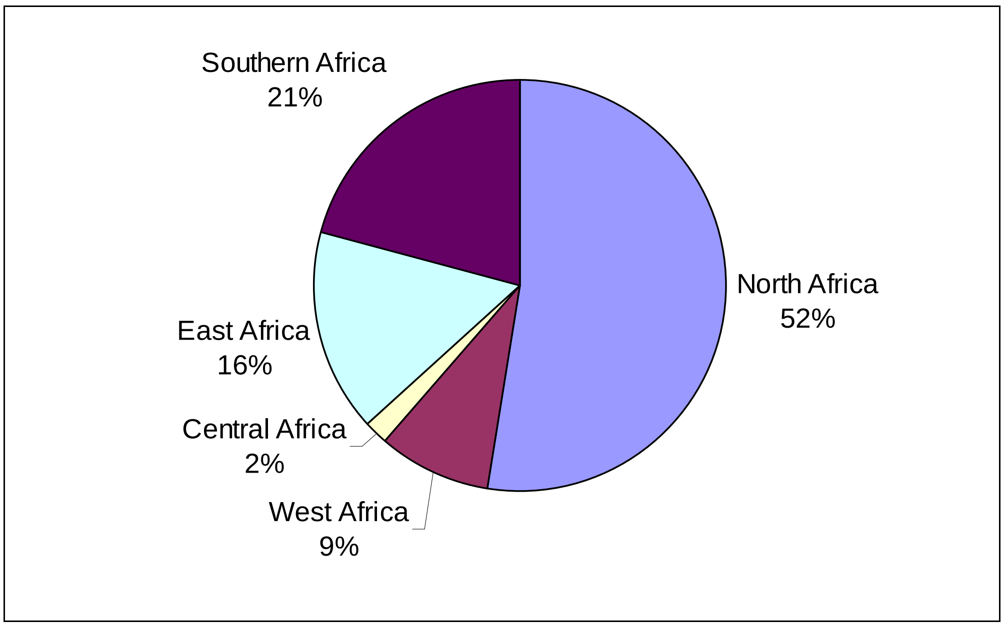
[5] Regions are the Caribbean, Central and Eastern Europe, European Union, Latin America, Middle East, North Africa, North America, Northeast Asia, Oceania, Other Western Europe, South Asia, Southeast Asia, sub-Saharan Africa

- o Tourism receipts recorded per arrival in Africa was the lowest of all regions in 2008, with an average of US$640 received per arrival compared to US$970 per arrival in Europe, US$1,130 per arrival in Asia and US$1,280 in the Americas (almost double the earnings per visitor of Africa).
- o Of the top 50 tourism destination countries in the world for foreign tourists only 4 are in Africa, namely Egypt (21), South Africa (24), Morocco (30) and Tunisia (34).

- **Regional distribution of tourism**

- o Tourism development is skewed regionally in Africa, with North Africa (including Egypt) attracting more than half of all tourism receipts to the continent. Central Africa's share is only 2%.

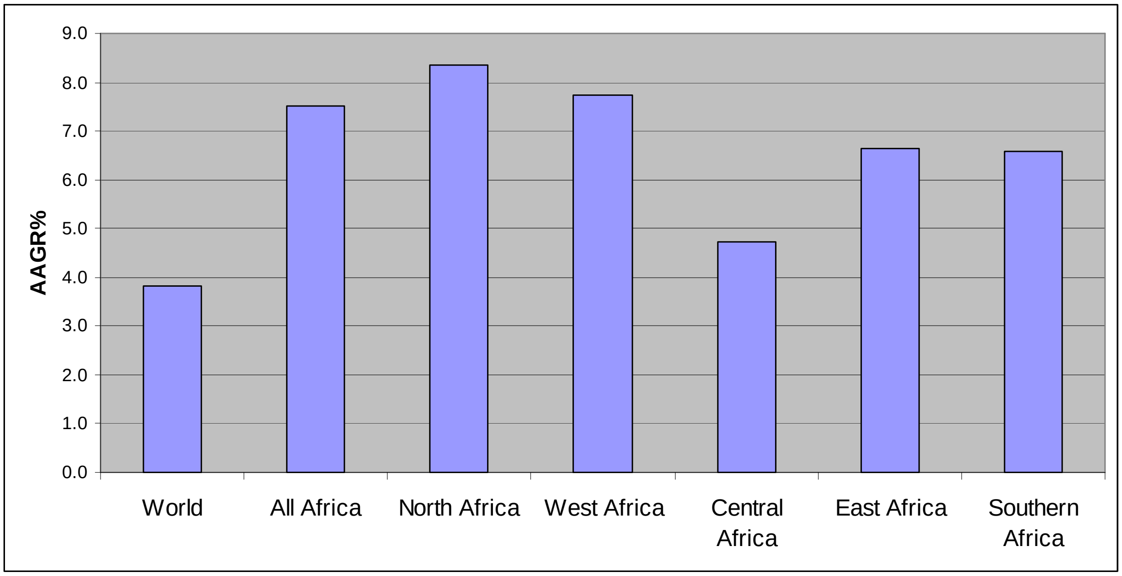
Fig. 2: Regional Share of Africa's Tourism Receipts, 2008



Source: UN World Tourism Organization, 2009

- o While growth in tourism arrivals over the period 2000-2008 has exceeded the global average, the continent's share of global gains in tourism receipts recorded over the eight-year period was only 5.6%.

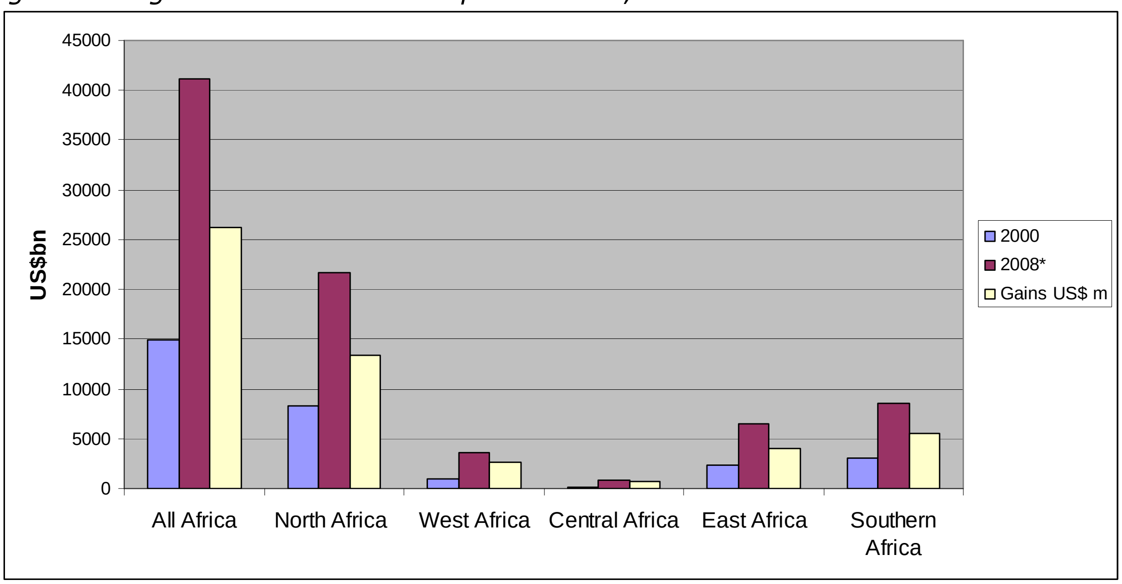
Fig. 3: Average Annual Growth in Tourism arrivals, World and Africa, 2000-2008



Source: UN World Tourism Organization, 2009

- o Some regions that have displayed high growth rates in tourism receipts, i.e. Central and West Africa have come off a low base and while such high growth rates are notable, the gains in actual receipts are low, especially in Central Africa.

Fig. 4: Real growth in tourism receipts to Africa, 2000 - 2008



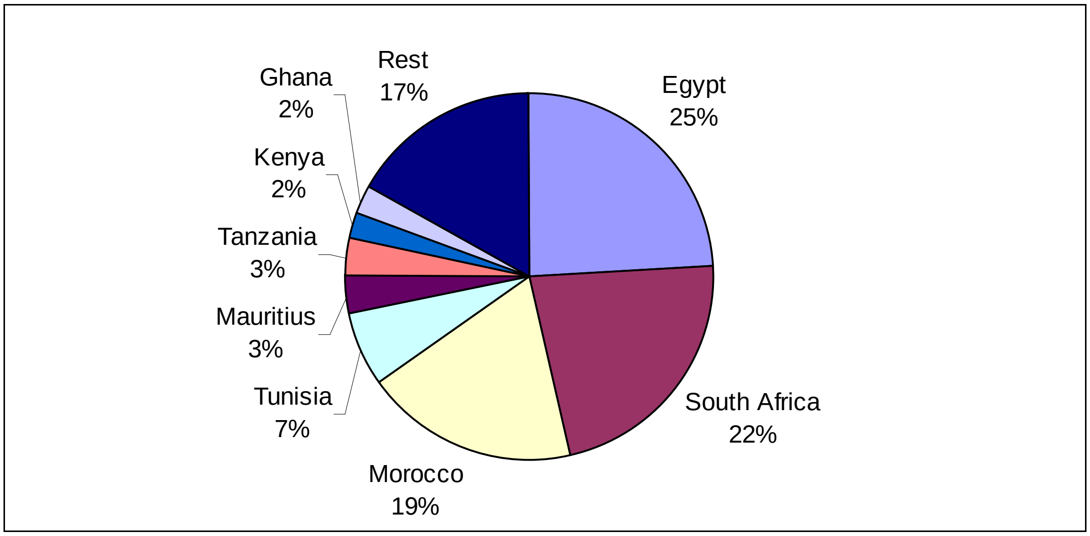
Source: UN World Tourism Organization, 2009

- **Key tourism country destinations**

- o The tourism dominance of Africa's main tourism destinations namely Egypt, South Africa, Morocco and Tunisia is evident from Figure 5 below, with these – four countries attracting almost 75% of tourism receipts to the continent.

- Other main destinations are Mauritius, Tanzania, Kenya and Ghana. The other 45 countries collectively attract 17% of all tourism receipts.

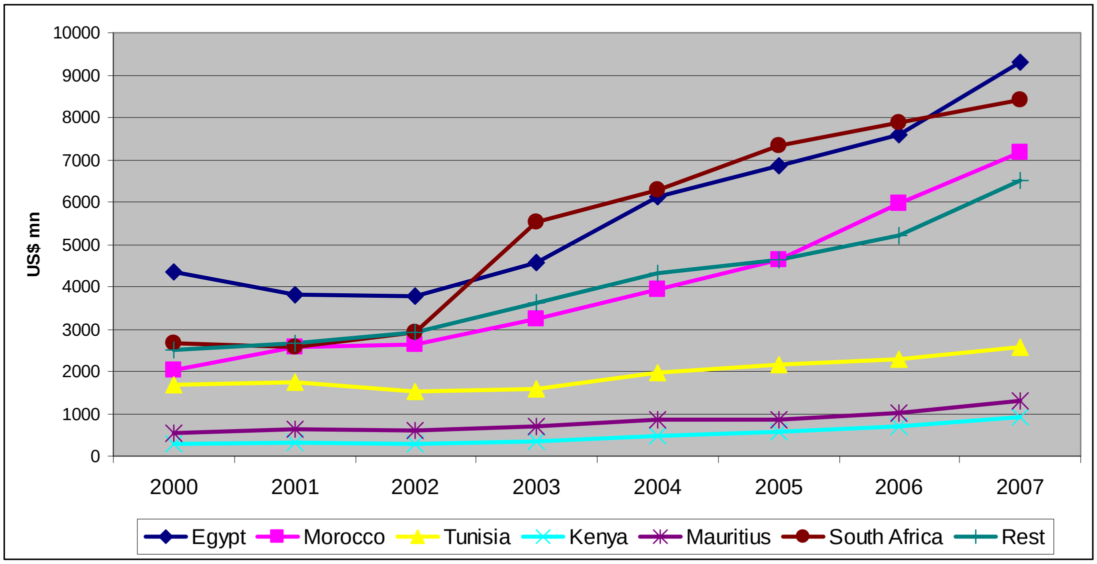
Fig. 5: Share of Tourism Receipts of Main Country Destinations in Africa, 2007



Source: UN World Tourism Organization, 2009

- All main countries experienced excellent growth in tourism receipts during the period 2003 – 2007.
- The effect of the global economic crisis on longer haul and more costly destinations which are dependent on visitors from Europe, like South Africa is evident, while shorter haul medium cost destinations like Egypt and Tunisia, that have a diversified product offer continue to do well.
- The "rest" of destinations (i.e. those in addition to the top markets) have also experienced good growth in tourism receipts during the past three years, an indication that some traditionally lesser known destinations, such as Cameroon, Madagascar, Uganda, Namibia, Mali, etc. are gaining in popularity.

Fig 6: Growth in Tourism Receipts to Key Africa Destinations, 2000-2008

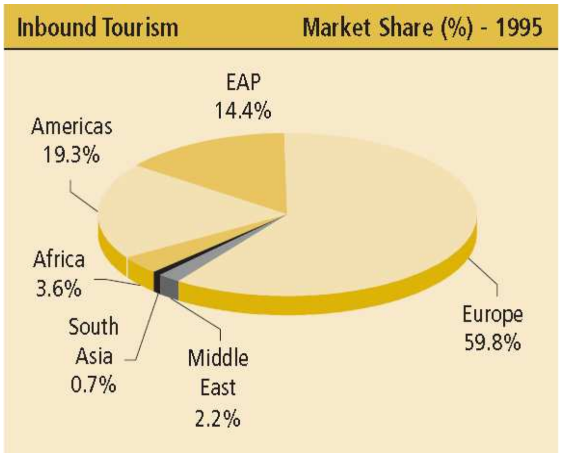


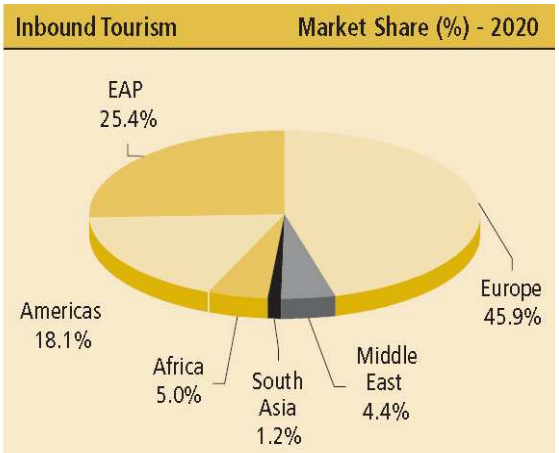
Source: UN World Tourism Organization, 2009

- **Growth forecasts**

o The UNWTO Vision 2020 for Africa forecasts a growth in Africa's share of global tourism arrivals from 3.6% in 1995 to 5% in 2020. The latest UNWTO Barometer publication (UNWTO, 2009) places Africa's share of foreign tourism arrivals at 5.1%, exceeding the projected figures.

Figure 7: UNWTO Vision 2020 Forecasts, (published 2001)





Source: UN World Tourism Organization, 2001

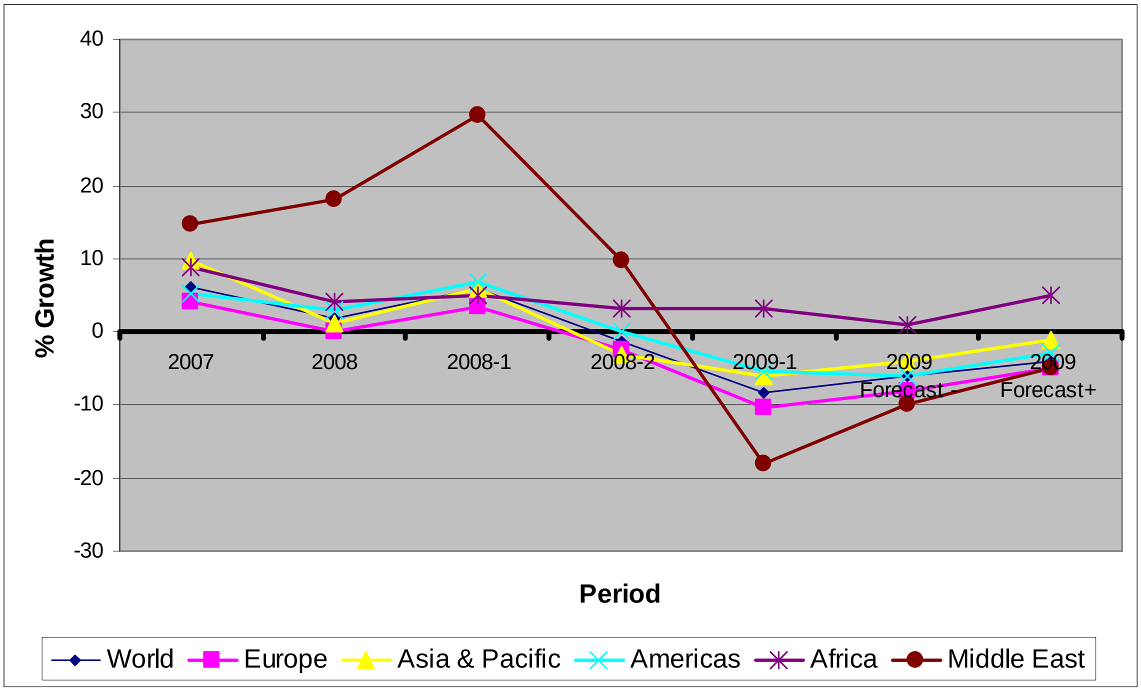
o Figure 7 indicates the projected impact of the global economic crisis on the various world regions. There was a downward spiral in tourism arrivals since the second half of 2008 with all regions, except Africa recording negative growth figures during the first semester of 2009.

o UNWTO projections for the second half of 2009 forecast further declines of between 1% and 8% for the second semester of 2009 for all regions, except Africa.

o Forecasts are that tourism to Africa will remain stable with a growth of between 1% and 5% during the latter part 0f 2009.

o While "sun and sea" tourism on the Mediterranean and Red Sea is being hard-hit by current economic conditions, indications are that the short haul destinations in North Africa, which offer a diversity of experiences will become increasingly attractive compared to the long haul, tailor-made destinations in East and Southern Africa.

Fig. 8: Real and Forecast Growth in International Tourism Arrivals, 2007 – 2009



Source: UN World Tourism Organization, 2009

2.3 External factors influencing tourism

As in other regions of the world tourism in Africa is impacted by a range of macro factors, including:

- **Global economic crisis**

o As indicated above the unfavourable global economy is impacting negatively on tourism economies throughout the world. While Africa is expected to suffer less than other regions, the UNWTO has expressed uncertainty in this regard, due to scant information regarding the impact of the crisis in Africa.

o Efforts by governments in North Africa to diversify their offering and prospects of the 2009 FIFA Confederations Cup and 2010 FIFA World Cup in South Africa are expected to benefit African tourism during these difficult economic times.

- **Safety and security conditions and perceptions**

  - Tourism promotion efforts are often hampered by regional and country conflicts. While tourism-related incidents have been few and far in between, global media coverage of conflicts and safety incidents affect safety perceptions.
  - Stable and secure destinations often suffer from poor and uninformed perceptions resulting from conflicts in neighboring territories.
  - A concerted and consistent effort and resources will be required to communicate actual situations, educate the travel trade, keep tourists informed of safe travel opportunities and rectify unwarranted images.
  - Air safety is a cause for concern in Africa and the continent's air safety reputation is not good. This threat can be overcome through effective communication as most air safety incidents have resulted from unknown and unregistered airlines.

- **Health threats**

  - African countries are mostly ill-equipped to deal with the potential impact of major health threats on the travel industry. While the recent H1N1 virus has to date not affected Africa more negatively than other regions, the threat has once again highlighted the vulnerability of many African countries and the limited capacity to cope with such serious threats.
  - Traveler concerns during times of health threats could substantially affect travel demand to the continent and tourism industry should establish close partnerships with health authorities to act responsibly and maintain good communication with customers.
  - The results of a survey conducted among major international tour operators to Africa and presented in Chapter 3 underline the importance of personal safety, security and health for travelers to Africa. As highlighted in Chapter 2.4.4 safety and health requirements are particularly stringent among Japanese visitors.

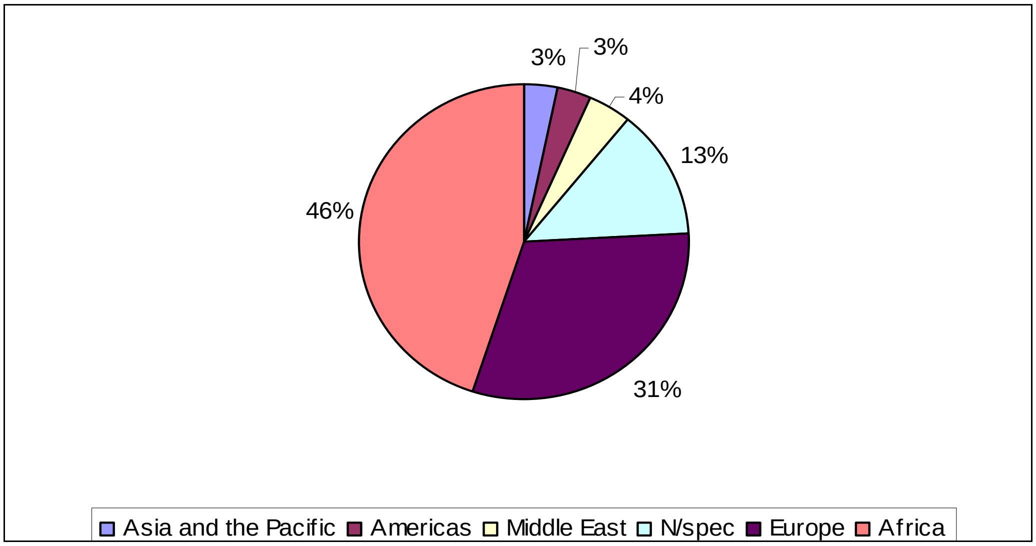
2.4 Market structure and demand conditions

The following assessment provides an indication of tourism flows to the continent.

2.4.1 Key source markets

- Almost half (46%) of tourism arrivals originate on the continent, with Europe being the other main source region of visitors to Africa.
- Asia and the Pacific, the Americas and the Middle East all comprise between 3% and 4% of Africa's tourism arrivals.

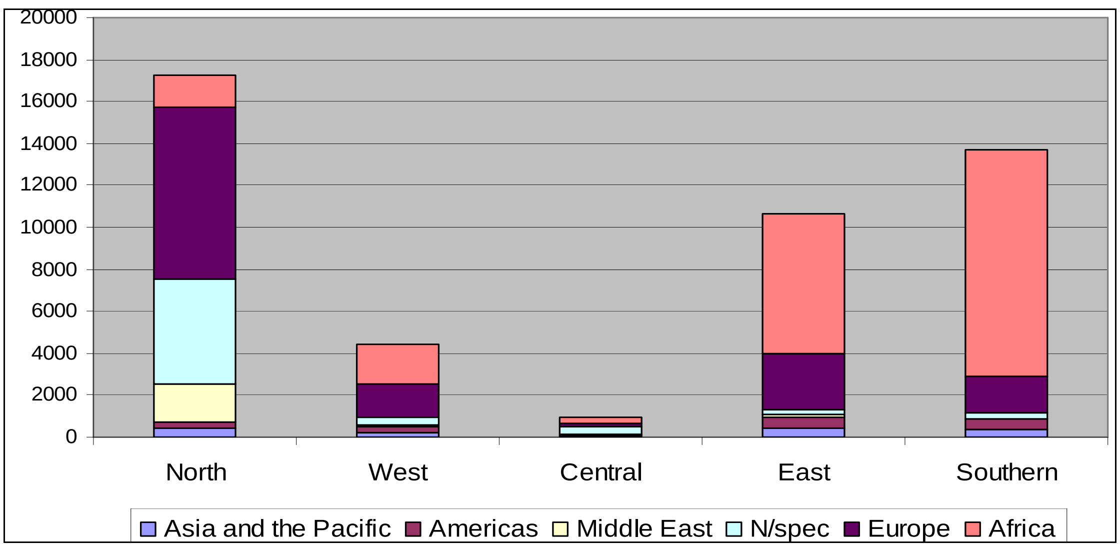
Fig. 9: Source regions of visitors to Africa, 2009



Source: UN World Tourism Organization, 2009

- The figure below indicates the difference in source and target markets between the regions with North and West Africa depending heavily on Europe and Southern and East Africa relying heavily on visitors from Africa.

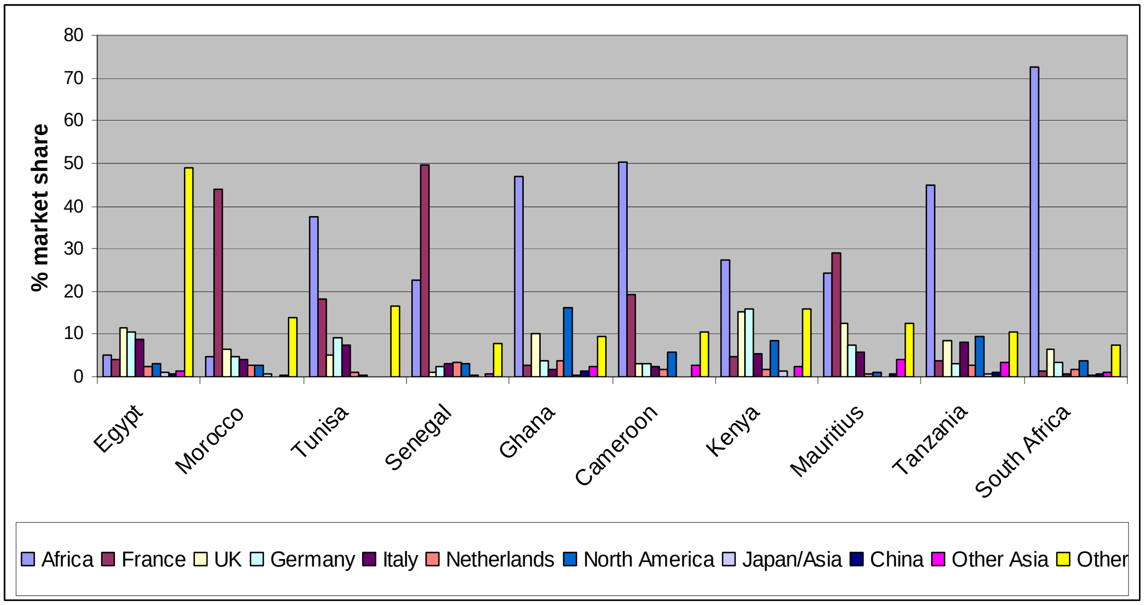
Fig. 10: Source of visitors to regions in Africa, 2008



Source: UN World Tourism Organization, 2009

- Concerning the source markets of tourism countries in Africa in 2006 clear market differences emerge. The graphs following below provide examples of source market compositions for leading destinations in Africa.

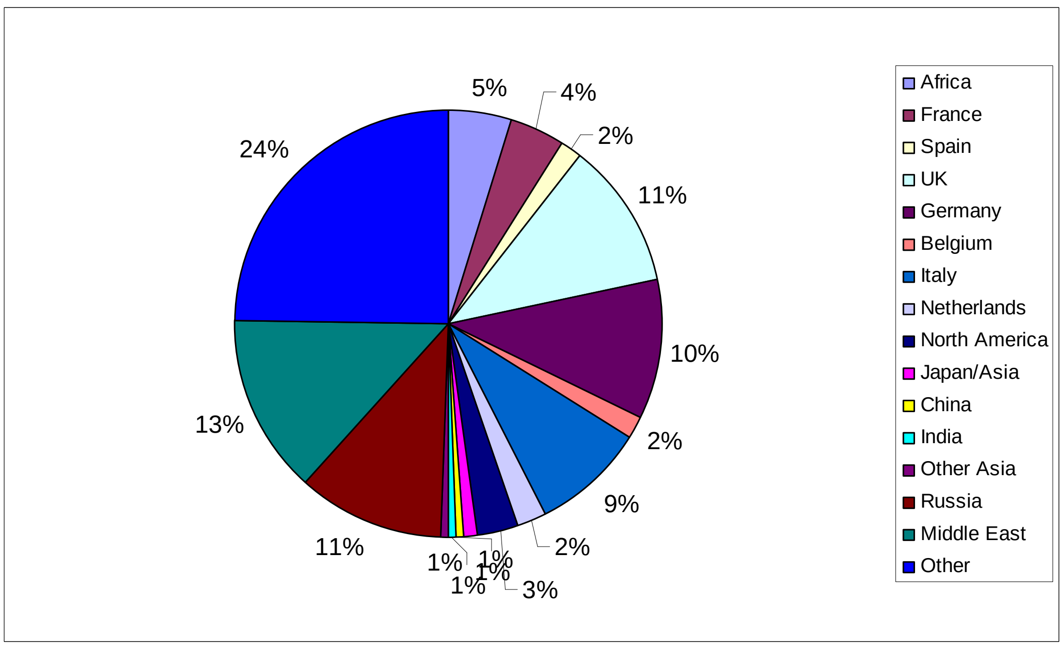
Fig. 11: Key source market shares of selected African tourism destinations, 2006



Source: UN World Tourism Organization, 2007

- Egypt has well-diversified market drawing substantial visitor numbers from all the large European markets as well as Russia and the Middle East. North America and Asia have relatively small market shares, demonstrating Egypt's appeal as a short-haul, value for money destination.

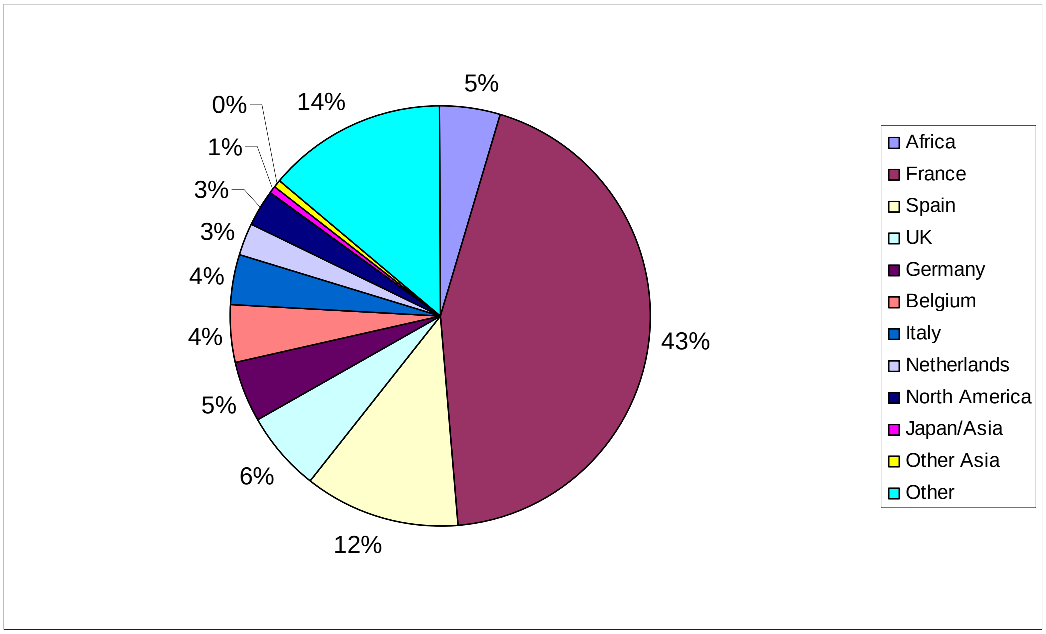
Fig 12: Egypt, Key Source Markets, 2006



Source: UN World Tourism Organization, 2007

- For North Africa, e.g. Morocco, France is the dominant market, with other Mediterranean markets like Spain and Italy having a substantial share. Asian markets have a very small share.

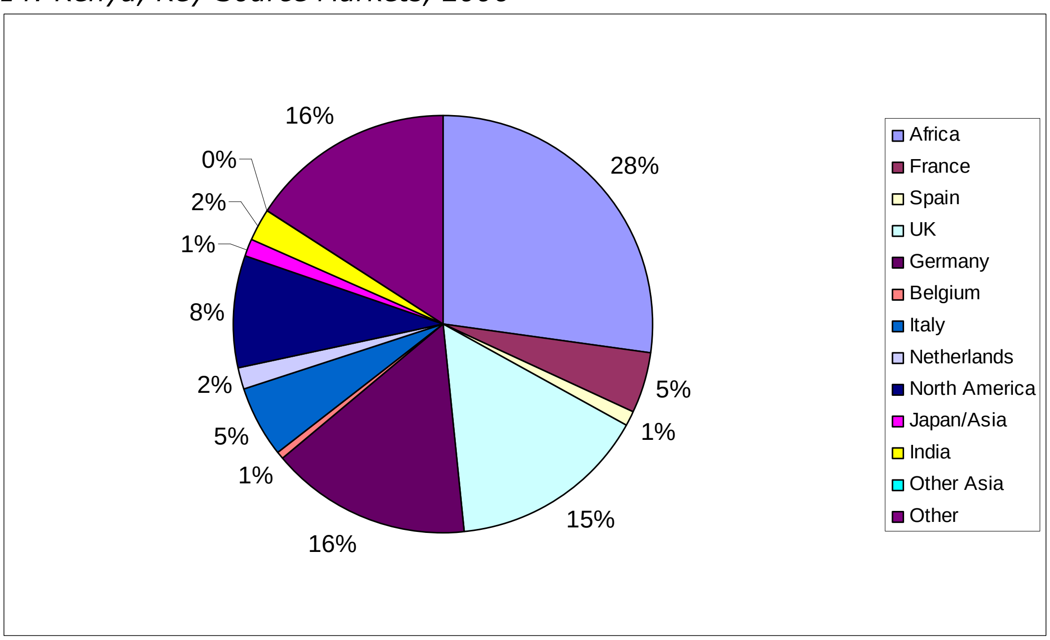
Fig. 13: Morocco, Key Source Markets, 2006



Source: UN World Tourism Organization, 2007

- For Kenya, arrivals from Africa comprise almost 30% of all visitors, with European markets comprising a further approximately 45% of arrivals. India and Japan are the only Asian markets of significance.

Fig 14: Kenya, Key Source Markets, 2006

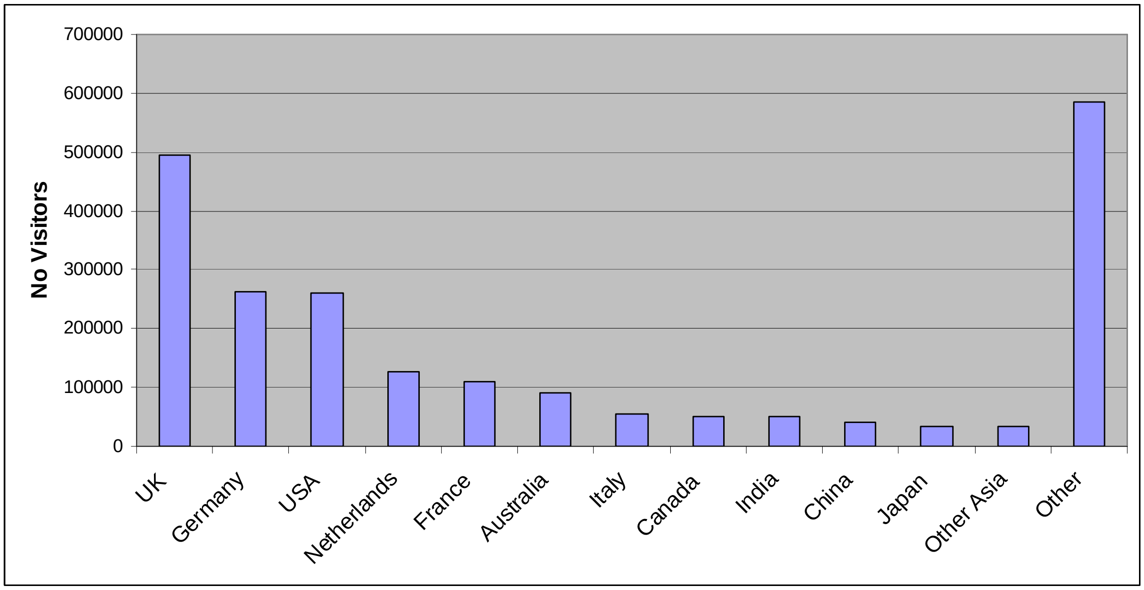


Source: UN World Tourism Organization, 2007

- Arrivals from Africa comprise almost 75% of all arrivals to South Africa, indicating the central role of the country as a business hub for sub-Saharan Africa.

- Source markets outside of Africa are mainly from Europe and North America, with Asian visitors comprising a small share of arrivals.

Fig. 15: South Africa, Source Markets excluding Africa, 2006



Source: UN World Tourism Organization, 2007

2.4.2 Key market segments

An investigation of tour operator offerings (see Annex B) and country market research reveals the following key market segments as having the best potential for growth.

The segment descriptions are meant to provide a broad overview of the types of travellers that patronize some or all African countries and are not intended to provide an all-inclusive segmentation framework. The segments identified are:

- Family Relaxers prefer relaxation, fun, eating, family time;
- Independent Relaxers prefer relaxation, peace, tranquillity, eating and drinking;
- Luxury Discoverers prefer new exotic experiences and destinations, exclusivity, being pampered;
- Packaged Discoverers prefer new experiences and destinations, seeking comfort in organization;
- Mature Explorers prefer soft adventure, soft exploration, learning experiences;
- Adventurous Explorers prefer adventure, off the beaten track experiences, learning and social interaction;
- Special interest segments such as aquatic sports, cultural/ heritage/ archaeology exploration, eco experiences, adventure experiences want to have exceptional experiences relating to their fields of interest.

Table 2: Overview of Broad Market Segments Attracted to Africa

Segment	Profile	Experiences	Regions of Africa
Family Relaxers Relaxation, fun, eating, family time	• 30-50 years • Families with school going children mostly Europe • Middle Income	• Sun, sand and sea holiday • Value for money • Family activities/relaxation • Good food	• North Africa Mediterranean resorts • Red Sea resorts • Kenya coastal resorts • Mauritius
Independent Relaxers Relaxation, peace and tranquillity, eating and drinking	• 20 – 60 years • Singles and couples • Pre/post children • Medium to high income	• City breaks • Rural escapes • Upmarket beach resorts • Good food, wine, music	• Cape Town and Winelands • Morocco • Zanzibar • Mauritius
Luxury Discoverers New exotic experiences and destinations, exclusivity, being pampered	• 45-65 years • Couples, post children • High Income • Pre and post- retired, often money rich, time poor	• Exclusive, exotic experiences • E.g. fly-in safaris, island retreats, spa and wellness, luxury cruises • High quality services	• North Africa: luxury cruises Nile Mediterranean • East Africa: Tanzania, Kenya, Uganda, Rwanda, luxury safaris & coastal islands • Indian Ocean Islands: Seychelles, Mauritius • Southern Africa fly in safaris : Botswana, South Africa, Namibia, Zambia
Packaged Discoverers New experiences and destinations Comfort in organization	• 30-65 • Small to larger groups • Mostly without children • Middle income • Mostly first time visitors	• Packages inclusive guided tours • Value for money • Variety of sights and highlights • General interests	• North Africa: desert tours, Nile cruises, culture tours • East Africa: Kenya, Tanzania, Uganda packaged safaris; safari, culture and coast packages, etc • South and Southern Africa: roundtrip tours : Victoria Falls, Botswana, South Africa, Namibia
Mature Explorers Soft adventure Exploration with comfort Learning experiences	• 45 years+ • Well- travelled and educated • Professionals • Middle-high income	• Culture and nature exploration • Interaction with communities • Special culture and nature phenomena	• North Africa culture and desert tours and treks • West Africa: cultural exploration of tribal regions; regional overland tours • East Africa: independent safaris, gorilla viewing, cultural tours (e.g. Ethiopia), mountaineering, etc. • Southern Africa: independent self-drive tours of Southern Africa regions and countries

Table 2: Overview of Market Segments Attracted to Africa (cont.)

Adventurous Explorers Adventure Off the beaten track experiences Learning and social interaction	• 20-35 years • Well travelled relative to age • Often volunteers, scientists, and religious travellers • Limited income, budget conscious	• Backpacking • Community based tourism and interaction • Wildlife and nature volunteering • Authentic eco and culture tourism experiences	• North Africa: desert exploration, treks and trails • West Africa: community volunteering, backpacking, overlanding • East Africa: community volunteering, backpacking, overlanding, primate trekking • Southern Africa: backpacking, wildlife volunteering, adventure tours and travels, urban backpacking, Mozambique, South Africa
Special interests ▪ *Aquatic sports* i.e. diving, deep sea fishing, yachting, boating, sea kayaking, surfing ▪ *Cultural/ heritage/ archaeology* exploration ▪ *Eco experiences* e.g. birding, botany, desert ecology, whale and dolphin watching, etc. ▪ Adventure experiences e.g. desert racing, mountain climbing and trekking expeditions, wind sports, paragliding, dhow journeys	• Across age groups • Committed to a particular interest • Often part of associations and networks • Often travel with persons of similar interest	• Birding • Archaeology and history • Botany and seeds • Golf • Astronomy • Steam trains, boats, • Etc.	• North Africa: archaeology, ethnology, nature, diving, Egyptology, golf, etc. • West Africa: slave history, ethnology, birding, agriculture, etc. • East Africa: primate studies, birding, diving, mountaineering, archaeology, wildlife conservation, adventure sport, etc. • Southern Africa: conservation and wildlife, birding, marine science and diving, archaeology, ethnology, golf, adventure sports, etc

2.4.3 Market drivers

Today's travellers take travel decisions at short notice, are value-conscious, are brand-aware, avoid personal risks in travelling and prefer to be more involved in travel planning. Africa is faced by a number of challenges in responding to these requirements, including:

- ***Image and perception***

One of the main tourism demand challenges facing most African countries is that of a poor and confusing image and brand credibility. Country interviews (see Annex A) confirm unwarranted negative perceptions as one of the key obstacles to tourism growth in Africa.

Yet, 55% of tour operators surveyed (see Chapter 3), who are in the know and familiar with the situation on the ground, rate Africa's tourism image and perceptions as Good (45%) to Excellent (10%), with 30% rating it as Average and 16% as Poor.

The lack of a clear and credible tourism image of Africa is a double-edged sword as it involves:

- A general lack of knowledge and awareness of Africa's magnificent tourism resources and the many tourism possibilities available on the continent. Africa's international tourism coverage is generally limited and the continent's share of the positive international media voice is small. Potential source markets in Asia, Europe and the Americas hear and see very little of Africa's treasures in general media coverage.

  The issue is perpetuated by very limited marketing budgets of most African countries and destination advertising and publicity is often overshadowed by images of established and developed tourism destinations. For example, tourism marketing budgets of Uganda, Rwanda, Zambia and Cameroon allow only for operational expenses and attendance of a few selected travel fairs, with no scope for advertising, sales trips, professional PR services, etc.

- Images of political conflicts and strife are carried widely in the international media and little distinction is made between safe and stable countries and their neighbouring and regional counterparts where conflicts prevail. As a result, countries that are perfectly safe to travel suffer from poor travel perceptions and fears originating in surrounding regions.

  In addition negative images resulting from events long passed stick to some destinations, detracting from their true potential and positive characteristics. Examples are Uganda and Rwanda that border on countries like the DRC, Burundi and Sudan and have experienced genocide and dictatorships in years gone by. Yet, both these countries have entered new and prosperous eras, are perfectly safe to travel and have much to offer tourists. Similar image challenges affect other stable countries in East, Southern and West Africa as a result of ad hoc civil strife and regional and cross-border conflicts.

The tourism industries of African countries that are committed to stability, economic growth and tourism advancement need the support and partnership of their governments, the international community and media to battle unwarranted negative perceptions and to communicate the true state and potential of tourism.

- ***Travel costs from Asia***

Cost of travel (both real costs and opportunity cost of time) to many countries in Africa, especially longer haul countries in sub-Saharan Africa, are higher than world averages. This is due mainly to the following factors:

o High air travel cost and duration and limited choice of flights are major limiting factors. As can be seen from the results of stakeholder interviews (see Annex A) limited air connections are one of the main growth obstacles cited.

  Table 3 below provides an example (based on specific travel dates, selected to exclude specific Asian events) of cheapest available airfares, shortest travel duration and the number of stops required for travelling from selected Asian countries (Japan, China, Korea, India) to cities in the various regions of Africa and main world cities (London, Paris, New York, Dubai). The table indicates that:

  - Airfares from Japan (Tokyo) to North Africa are slightly more expensive, but largely on par with costs to established destinations elsewhere even though the journey takes 30% longer and requires at least one stop along the way.

    However, airfares from Tokyo to East Africa and Johannesburg in South Africa cost twice as much and are 50-80% longer compared to established world destinations; those to lesser-frequented destinations in Southern Africa such as Windhoek (Namibia) and Lusaka (Zambia) cost three times more and take twice as long and those to West Africa are almost four times more expensive and take twice as long than to established destinations.

  - Airfares from China (Beijing) to North Africa are around 20% more expensive than those to other established destinations and about 50% longer.

    Airfares from China to East Africa and Johannesburg are 50 – 80% more expensive and longer than to established destinations, those to lesser-frequented destinations in Southern and Central Africa cost three times more and take twice as long and those to West Africa cost between four and five times more and take twice as long.

  - Airfares from Korea (Seoul) to East Africa and Johannesburg are on par with those to other world areas, although they involve a stopover and take about 50% longer. The high internal airfares in Africa are evident, with connections from Kenya and Tanzania to neighboring Uganda and Ethiopia doubling the cost of flights.

    Fares from Korea to North Africa and West Africa are about twice as costly and 50% longer than those to main world destinations.

  - Airfares and duration from India (New Delhi) to North Africa (except Morocco), East Africa and Johannesburg are on par with those to major world destinations, while those to West, Central and less-frequented countries in Southern Africa are twice as costly and long.

Table 3: Examples of fares, duration and convenience[6] of air travel from selected Asian countries to Africa and the rest of the world

	TOKYO			BEIJING			SEOUL			NEW DELHI		
	Cheapest return US$	Shortest Time (h)	Fewest Stops	Cheapest return US$	Shortest Time (h)	Fewest Stops	Cheapest return US$	Shortest Time (h)	Fewest Stops	Cheapest return US$	Shortest Time (h)	Fewest Stops
NORTH												
Cairo	858	16.20	1	1329	16.35	1	1191	16.45	1	542	8.35	1
Rabat	1048	17.05	1	1147	15.10	1	1851	19.40	1	1932	14.25	2
Tunis	998	16.40	1	1149	16.15	1	1139	16.15	1	654	11.50	1
WEST												
Bamako	3453	21.00	1	4071	20.20	2	1986	19.40	1	1526	16	1
Dakar	3488	22.35	1	3660	19.50	2	2021	19.55	1	1566	18.50	1
CENTRAL												
Luanda[7]	2631	24.25	1	2481	20.30	1	2770	23.15	2	2353	20.25	1
SOUTHERN												
Windhoek	2442	24.10	1	2305	23.20	2	1229	22.50	2	1965	17.15	2
Johannesburg	1610	19.10	1	1363	18.05	1	875	17.50	1	878	13.35	1
Lusaka	2997	24.35	1	2187	22.15	2	1816	24.50	2	1101	14.55	1
EAST												
Dar-es-Salaam	1802	22.55	2	1480	18.35	1	851	19.30	1	851	11.55	1
Nairobi	1606	19.15	1	1399	17.05	1	833	16.50	1	740	11	1
Entebbe	1814	24.15	2	1492	20.15	2	1684	20.50	2	869	13	1
Addis Ababa	1789	17.10	1	1644	16.15	1	1659	16	1	751	6.10	0
GLOBAL												
London	830	12.15	0	894	11.15	0	1019	12.10	0	698	9.20	0
Paris	818	12.30	0	890	11.00	0	858	12.05	0	655	9	0
New York	654	12.30	0	1089	13.30	0	1160	13.35	0	1074	16.05	0
Dubai	854	14.05	0	1170	8.35	0	753	10.10	-	310	3.20	-

= Lowest Cost <US$1,100 = Medium Cost US$1101-US$1,900 =High Cost US$1,901+

[6] Sourced from www.expedia.com for return travel, departure 15 January 2010: return 23 January 2010 (selected to avoid major Asian events)
[7] Angola is classified as Central Africa according to UNWTO's classification.

- Travel prices to Africa are also affected by the high importation and operating costs. Many countries do not produce suitable quality construction materials, furnishings, vehicles, other equipment, foodstuffs etc. and capital and operating costs are negatively affected by these factors. High import costs and often volatile currencies put pressure on prices and profits. Prices and profits are also negatively affected by high local operating costs such as high transport and electricity tariffs.

  Investors expect higher returns in countries where tourism is in its infancy and the combination of high operating costs and high expected returns makes it difficult for many destinations to maintain price competitiveness.

- The fact that many destinations are at the beginning of the tourism life-cycle with limited investment and variety of choice in hospitality and tourism services puts further pressure on prices. This, coupled with fluctuating and seasonal demand, results in inflated prices and poor value for money, especially in cities where demand can suddenly increase during special events, political activity, etc.

Normal market conditions and demand-supply balances are clearly absent in the tourism value chains of many developing destinations in Africa. Investment conditions on the continent are often regarded with suspicion by foreign investors and conditions of market failure prevail, with the result that many African destinations have had limited success in capitalizing on their unique tourism potential and resources.

The tourism industries in many African countries are in need of external support (government and international) to break through these barriers and trade competitively under suitable market conditions.

- ***Distribution channels and systems***

Successful distribution systems for Africa are adapted to suit the conditions and circumstances facing the continent. Some pointers in this regard are:

- Apart from Mediterranean destinations such as Morocco, Tunisia and Egypt with established, volume-driven tourism industries and other established destinations like South Africa, Kenya and Tanzania, the majority of African destinations are suitable for medium to small tourism volumes. This is due mainly to a combination of limited tourism capital investment (rooms, transport) and fragile nature and cultural resources with limited carrying capacities.

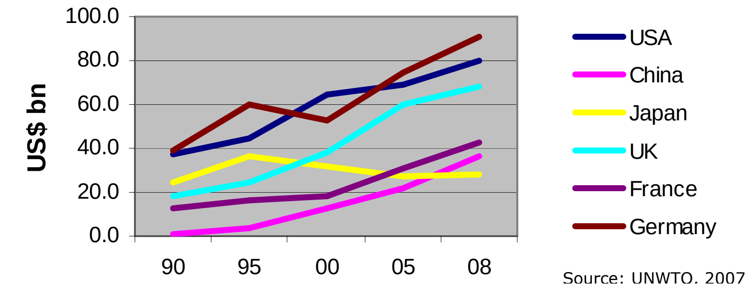
- While the leading tour operators in Europe and elsewhere are increasingly improving and diversifying their African products, they tend to focus on the highlights and their retail sales forces are often not well-informed and educated regarding African products. Similarly larger scale e-business and reservations platforms provide limited opportunities for featuring emerging African destinations and products.

- This lack of scale combined with a well-informed, active and educated client base (see market segmentation above) require specialized intermediaries e.g. tour operators, travel agents and e-business systems.
- Tourism authorities and destination management organizations (DMOs) often lack the skills and understanding of the travel channel to engage foreign tour operators and more should be done to foster partnerships and initiate educational programmes for both DMOs and foreign operators.
- Travellers with preference for discovery and exploration, which are the key target segments for most destinations in Africa, are known to use the internet extensively for planning and booking their travels. Such travellers often bypass intermediaries and book through internet booking engines or directly with products and services.
- Smaller scale products and new destinations in Africa mostly face technology challenges such as limited internet connectivity, bandwidth and IT skills and while consumer-facing websites are easily accessible to clients in developed countries, managing content and transacting on the internet prove major challenges for travel businesses in many emerging tourism countries in Africa.
- Word-of-mouth and organization affiliation (e.g. cultural, religious and special interest organizations) are major catalysts of tourism movement and can play an important role in stimulating tourism to the continent.
- Special skills development and travel trade education and exposure programmes should be encouraged to educate the African travel trade and destination managers regarding distribution possibilities and e-business marketing and sales techniques.

2.4.4 The Japanese market in Africa

While this study does not aim to conduct a detailed market analysis of the Japanese travel market to Africa, the following section provides a few pointers in this regard.

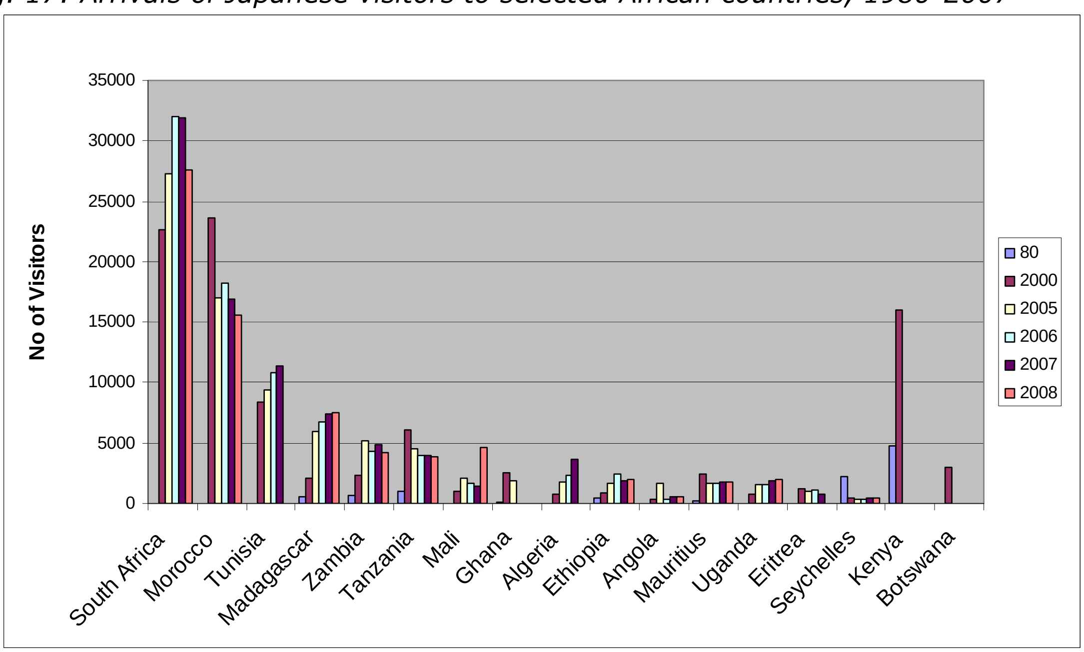
Fig. 16: International Tourism Expenditures, 1990-2008



While travel expenditure of main travel generating countries has grown rapidly during the past 10 years, Japanese outbound travel expenditure has largely stagnated, mainly due to economic constraints. However Japan remains a major travel market and Japanese visitors spent approximately US$28 billion abroad in 2008.

Figure 17 below indicates that, despite a global slowdown in tourism expenditure by Japanese travellers, key destinations in Africa such as South Africa, Tunisia, Zambia Uganda and Madagascar have experienced good growth in visitor numbers from this market during the last decade. Others, like Morocco, Tanzania and Mauritius show downward and stagnant trends. Kenya is historically also a strong player in the Japanese market; unfortunately data is only available until 2000. Selective data available for some countries indicates that 2008 and 2009 have proven difficult years for Japanese travel to Africa (UNWTO, 2009).

Fig. 17: Arrivals of Japanese visitors to selected African countries, 1980-2007

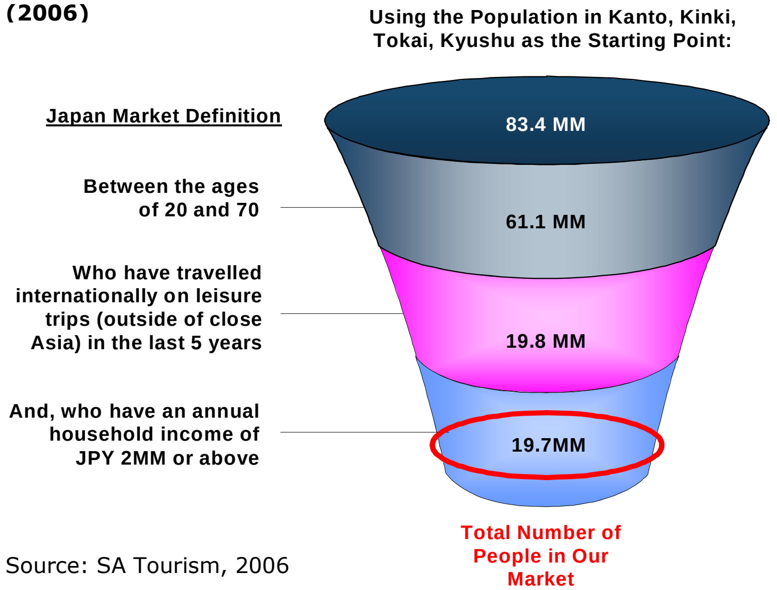


Source: UNWTO, 2009

South African Tourism's market intelligence for Japan is the most comprehensive of all countries in Africa and some key findings are as follows (SA Tourism, 2006):

- The potential market size for South Africa was calculated at around 20 million at the time of publication, which is less than 25% of the total Japanese market. SAT focused its research on the key tourism generating cities. Age, travel experience and income were used as key criteria to define the market.

Fig. 18: SA Tourism's definition of potential Japanese market size (2006)



Source: SA Tourism, 2006

- Of this potential market only approximately 4% of travellers had been to Africa and the Middle East during the past five years with the majority having visited destinations in Asia and the Pacific and a substantial number having been to Europe.

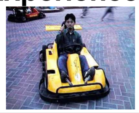
- Preferred activities undertaken by Japanese visitors to Africa were nature and scenery experiences (80.9% compared to 64.9% globally), historic and cultural attractions (77.9% compared to 47% globally), visiting art galleries and museums (51.5% compared to 32.6% globally) and scuba diving (13.2% compared to 5.1% globally). Activities that are preferred globally, but are less preferred in Africa are shopping (35.3% compared to 56% globally), gourmet sampling (19.1% compared to 40.6% globally) and rest and relaxation (16.2% compared to 27.1% globally).

- Factors cited by potential Japanese visitors as preventing them from travelling to South Africa include:
    - Concerns about personal safety;
    - Long flight times and transit;
    - Inadequate knowledge about Africa and South Africa;
    - Fear of infectious diseases;
    - Language problems;
    - Concerns about food; and
    - High travel costs.

South African Tourism (SA Tourism, 2006) identified six priority target market segments in Japan, as follows:

Segment	Scope	
Organized Wanderluster (lower priority segment) Females, early 30's Adventurous and culture Group tours	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY):	 5.4% 1,064 k 305
Experienced Wanderluster Young, single male, adventurous traveller FIT (Free Independent Traveller) and group	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY – Japanese Yens Per Trip):	 4.42% 871 k 171
Wanderluster Young, couples, relaxation and some adventure FIT and group	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY):	 4.63% 912 k 300
Positive convertibles Middle-aged, couples, well-travelled Cultural exploration, group package	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY):	 6.33% 1,247 k 278
Next Stop South Africa Middle-aged, male, well-travelled Relaxation and scenery Group tour	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY):	 2.93% 577 k 369
Senior Explorers 65 year + New destinations, famous sites Standard package, budget conscious	**Segment Size** % of Market # of People Per Person Travel spend on favourite trip ('000s JPY):	 3.96% 780 k 313

Table 4: Summary profiles of South Africa's target market segments in Japan

	Organised	Experienced	Wanderlusters	Pos Converts	NSSAs	Seniors
						
Purchase and Usage Environ-ment	• Average age: 31 • 73% female • All high worldly • Moderately travelled • More likely been to France, UK	• Average age: 29 • 60% male • Majority high worldly • Well travelled • More likely been to China, Thailand	• Average age: 30 • Half male/half female • All high worldly • Less experienced travellers • More likely been to US, Hawaii	• Average age: 53 • Half male/half female • Majority low worldly • Well travelled • More likely been to China, Italy	• Average age: 52 • 67% male • All high worldly • Well travelled • More likely been to China, France	• Average age: 65 • 65% male • Majority low worldly • Well travelled • More likely been to China, Italy
Desired Experi-ence	• Desire: adventure with culture • Activities: concerts/ performances • In SA: wildlife, scenery • SA: 19 days at JPY300K	• Desire: adventure with culture • Activities: local food, shopping • In SA: culture, wildlife, Cape Hope, apartheid • SA: 10 days at JPY450K	• Desire: relaxation with scenery • Activities: local food, shopping • In SA: scenery, culture, wildlife • SA: 9 days at JPY400K	• Desire: culture • Activities: local food, shopping, museum • In SA: scenery, wildlife, Vic Falls • SA: 11 days at JPY500K	• Desire: relaxation with scenery • Activity: concerts/ performances • In SA: wildlife, scenery, Vic Falls, Cape Hope • SA: 12 days at JPY550K	• Desires: famous icons which can be culture or scenery • Activities: shopping, museum • In SA: scenery, Cape Hope, Vic Falls • SA: 9 days at JPY450K
Beliefs and Associa-tions	• SA beliefs: rich wildlife, apartheid, costly flight • SA barriers: safety, long flight	• SA beliefs: good weather, rich wildlife, apartheid, costly flight, politically unstable • SA barriers: long flight	• SA beliefs: rich wildlife, apartheid, costly flight, politically unstable • SA barriers: safety, long flight	• SA beliefs: apartheid, politically unstable • SA barriers: safety, long flight	• SA beliefs: rich wildlife, good weather, apartheid, costly flight • SA barriers: safety, flight	• SA beliefs: apartheid, politically unstable • SA barriers: lack of knowledge, safety, long flight
Purchase and Usage Behaviour	• Low involvement • Info sources: Internet, brochures • Planning time: 1-3 months • Travels with spouse	• High involvement • Info sources: Internet, travel books • Planning time: 1-2 months • Travels alone	• High involvement • Info sources: Internet, travel books • Planning time: 1-2 months • Travels with friends	• Low involvement • Info sources: brochures, Internet • Planning time: 2-3 months • Travels with spouse	• High involvement • Info sources: Internet, magazine • Planning time: 0-2 months • Travels with spouse	• Low involvement • Info sources: brochures, travel agents • Planning time: 2-3 months • Travels with spouse

Source: SA Tourism, 2006

While the number of Japanese tour operator respondents (selected from the members database of the Overseas Tour Operators Association of Japan, (OTOA)) in the survey of international tour operators to Africa presented in Chapter 3 is small (seven companies), they are experienced and each operator moves on average around 3,000 passengers per year to Africa. The findings largely corroborate the performance figures and preferences highlighted above and reveal interesting results for the past year, including:

- North Africa (mentioned by 60% of respondents), East Africa (mentioned by 40% of respondents) and Southern Africa (mentioned by 55% of respondents) were the main regional destinations in Africa for passengers in 2008. Central and West Africa's market shares were negligible.
- The majority of passengers visited Africa for nature tours and safaris (40%), with general touring (35%) second, special interest activities (17%) third and culture tours (8%) fourth.
- The majority of tours handled to Africa (54%) were medium-sized (7-20 passengers), with larger groups (20+) comprising 25% of passengers and small groups (1-6) comprising a further 21% of passengers.
- The majority (55%) were standard packaged tours, 30% were tailor-made packaged tours and 15% were FITs.
- The average trip was 7-8 days in duration.
- About 40% of respondents have their own destination management office in Africa while 60% make use of local Destination Management Companies (DMCs).
- Customer relations (loyalty programmes, newsletters, and word-of-mouth) are considered the most important promotions method (75% of respondents), with advertising second and PR and promotions third.
- Travel agencies remain the most important transaction channel (85%), with internet reservations channels second (71%) and direct sales third (57%).
- While 80% of respondents rated the past five years' growth in passenger number to Africa better than for other destinations, views regarding revenue growth were split with 33% respondents indicating better revenue growth than for other regions, 33% indicating similar growth and 33% indicating worse revenue growth.
- Africa's performance in terms of safety and security, ease of access and movement and government support were rated lowest of all factors, with nature and culture experiences and quality of food and accommodation rated highest. Most other aspects were rated average to good.
- Concerning the key challenges facing Africa's tourism advancement, safety and security were rated the most important by far, with improved health and hygiene, improved ground transport and improved quality of accommodation also rated as important challenges.
- The majority (60%) of respondents rated Africa's tourism growth potential as moderate.

2.5 Africa's tourism competitiveness

Table 5 below provides an overview of tourism competitiveness of selected African countries as measured according to the World Economic Forum's Travel and Tourism Competitiveness Index[8] (TTCI). The TTCI is based on three broad categories of variables that facilitate or drive T&T competitiveness. These categories are summarized into the three sub-indexes of the Index: (1) the T&T regulatory framework sub-index; (2) the T&T business environment and infrastructure sub-index; and (3) the T&T human, cultural and natural resources sub-index. Each of these three sub-indexes is composed in turn by a number of pillars of T&T competitiveness, of which there are 14 in all. These are:

i) T&T regulatory framework sub-index: a) Policy rules and regulations, b) Environmental sustainability, c) Safety and security, d) Health and hygiene and e) Prioritization of Travel & Tourism.

ii) T&T business environment and infrastructure sub-index: a) Air transport infrastructure, b) Ground transport infrastructure, c) Tourism infrastructure, d) ICT infrastructure and e) Price competitiveness;

iii) T&T human, cultural, and natural resources sub-index: a) Human resources, b) Affinity for Travel & Tourism, c) Natural resources and d) Cultural resources.

- The table reveals the following:
  - Of the 133 countries measured only four African countries rank among the top 70 destinations, namely Mauritius (40th), Tunisia (44st), South Africa (61st) and Egypt (64th).
  - Eight of the 10 least competitive countries are from Africa.
  - African countries score particularly well in the areas of environmental sustainability, price competitiveness and natural resources.
  - Areas of average competitiveness are safety and security, travel and tourism as a government priority and awareness of/affinity for tourism.
  - Areas that drag African destinations' competitiveness down are health and hygiene, air transport, ICT, tourism services and human resources.
- As already indicated, Africa's competitive advantages and unique positioning are clearly vested in the continent's authentic, often undisturbed and ancient natural and cultural treasures. Countries in Africa offer visitors the last of the world's undisturbed wilderness with varieties of unique flora and free-ranging fauna species; similarly in a fast-globalizing world Africa's variety of nations and tribes offer unique community and cultural experiences.
- The main challenge facing Africa's tourism competitiveness is that of providing appropriate access and services for developed-world tourism customers while at the same time finding a balance between meeting the immediate social needs of its inhabitants and conserving its unique resources for future generations.

[8] The index is compiled by using both quantitative, hard data and evaluation ratings of a panel of opinion leaders. It should be noted that a degree of opinion bias cannot be excluded.

Table 5: Travel and tourism competitiveness ranking of selected African countries (World Economic Forum, 2009)

	Overall Rank		Regulatory						Business Environment & Infrastructure						Human, Cultural & Natural				
	Region	World	Index	Pillars					Index	Pillars					Index	Pillars			
			Rank	Policy	Environ-mental	Safety/ Security	Health/ Hygiene	T&T Priority	Rank	Air transp.	Ground transp.	Services	ICT	Price	Rank	HR	Affinity T&T	Natural resource	Cultural resource
Mauritius	1	40	24	13	53	40	60	1	44	49	31	53	59	26	69	45	3	130	99
Tunisia	2	44	31	22	17	31	75	15	49	62	42	54	77	7	56	33	26	95	65
RSA	3	61	82	36	44	128	94	60	52	43	64	46	80	38	49	112	43	22	45
Egypt	4	64	52	55	103	67	64	9	65	58	79	74	84	1	73	83	20	109	60
Morocco	5	75	64	50	36	79	100	30	78	67	70	72	88	79	83	95	29	125	52
Botswana	6	79	66	70	62	49	97	43	76	83	66	79	93	9	95	120	49	34	126
Namibia	7	82	71	79	26	60	102	62	77	54	51	83	106	67	94	128	25	44	106
Gambia	8	87	65	85	52	27	107	25	90	85	58	124	100	14	98	102	13	101	107
Kenya	9	97	93	90	16	121	121	12	100	77	98	98	110	70	72	100	50	25	114
Tanzania	10	98	102	89	32	98	127	33	118	113	116	118	120	43	50	122	33	3	108
Zambia	11	100	87	43	45	58	116	81	115	107	97	111	112	75	85	121	75	16	111
Senegal	12	101	101	103	67	43	120	70	108	82	93	94	103	115	82	105	87	33	90
Ghana	13	110	105	84	48	69	117	108	102	101	96	105	114	36	104	114	56	57	105
Uganda	14	111	115	105	28	109	123	93	114	125	94	101	119	61	81	116	79	11	124
Algeria	15	115	108	111	116	97	81	124	98	110	101	95	97	32	127	101	132	105	69
Madagascar	16	116	112	83	65	93	131	57	106	93	115	84	127	55	119	107	93	70	123
Malawi	17	117	106	106	60	53	108	123	131	129	106	126	126	60	107	117	80	46	115
Mali	18	119	114	116	70	77	124	76	126	118	100	119	116	89	120	125	54	88	91
Benin	19	120	117	124	38	68	125	115	121	121	104	116	118	74	116	111	98	60	118
Zimbabwe	20	121	125	133	94	94	106	96	125	123	85	100	123	113	109	131	109	35	94
Ethiopia	21	123	128	100	109	117	133	111	112	97	117	122	132	15	101	124	121	36	83
Mozambique	22	124	120	99	57	103	130	85	129	116	129	117	129	51	125	130	95	56	113
Cameroon	23	125	126	120	110	80	112	125	132	126	114	114	124	104	115	123	97	42	129
Burkina	24	126	118	110	71	83	122	110	122	124	82	110	128	87	131	129	101	71	131
Nigeria	25	128	132	113	61	133	129	122	116	95	118	121	108	69	113	113	124	51	103
Côte d'voire	26	130	131	115	102	124	119	132	123	88	71	133	113	120	118	126	116	32	130
Burundi	27	131	129	128	75	106	118	133	119	120	86	123	131	71	126	127	16	97	133
Chad	28	133	133	132	128	115	132	127	133	131	131	131	133	125	132	132	120	99	132

Ranked top 1-20 | 21-70 | 71-90 | 90- 110 | 110 -120 | 120-133

2.6 Key resources and potential

While Africa is faced with substantial market and delivery challenges, it is a resource-rich continent, offering some of the most varied and unique nature and culture attractions and experiences on the globe.

Detailed travel information for each country is available in a range of travel books and websites and it is not the intention of this study to give a detailed resource inventory of each country.

Examples of tour products being sold to various market segments in key markets (i.e. USA, UK, Germany and the Netherlands) are presented in *Annex B* and provide a good idea of the attractions and experiences on offer in the various regions of Africa.

The following are the main regional tourism characteristics and resources.

Region	**Main Resources and Themes**	**Magnet attractions**
North Africa	• Coastal/beach tourism • Cultural (historical, archaeological, unique lifestyle and architecture, arts and crafts, etc.) • Desert and nomadic tourism	• Family beach resorts along the Mediterranean and Red Sea coasts • Pyramids of Giza and Nile Valley • Fez, Marrakesh, Carthage • Desert experiences
West and Central Africa	• Cultural (interesting tribal cultures, traditions, architecture) • History and heritage (slave trade, kingdoms and empires, etc.) • Community based experiences • Ecotourism (forests, birds, river tourism, etc.)	• Ancient cities: Djenne, Timbuktu, Agadez • West African music • Community-based experiences: Dogon country (Mali), Ganvie (Benin) • Ecotourism: Mole National Park (Ghana), Waza National Park (Cameroon), Reserve de la Lopé (Gabon) • Slave history Goree Island (Senegal), Cape Coast and Elmina Castles (Ghana), etc.
East Africa	• Wildlife Safaris (migrations, Big 5, plains game, primates, gorillas) • Cultural experiences (ancient heritage and contemporary cultures) • Ecotourism (forests, birds, plants, etc.) • Mountaineering (highest mountains in Africa) • Lakes and rivers (Rift Valley and lakes) • Coastal resorts (Indian Ocean)	• Serengeti, Selous, Masai Mara, Parc Volcanos, Ngorongoro, Bwindi and many other national parks • Wildlife migrations • Zanzibar, origins of mankind, Ethiopian ancient churches and cities (Lalibela, Axum), tribal cultures e.g. Masai, etc. • Various parks and forest areas • Rwenzoris, Kilimanjaro, Mt Kenya, Simien Mountains • Murchison Falls, Lake Victoria, Lake Tanganyika • Kenyan coast, Lamu Island, Zanzibar

Cont.

Region	Main Resources and Themes	Magnet attractions
Southern Africa	• Scenery and landmarks • Coastal resorts • Wildlife Safaris • Urban culture, wine, food, etc. • Cultural experiences • Outdoor active and adventure (Bungee jumping, white water rafting, mountaineering, diving, golf, cycling, etc.)	• Table Mountain, Cape of Good Hope, Victoria Falls, Okavango Delta, Namib Desert, etc. • Mozambique Bazaruto and Quirimbas archipelagos; South African Wild Coast and St Lucia estuary world heritage site • Okavango Delta, Chobe, Etosha, Kruger National Park, Luangwa, Gorongoza and others • Cape Town and the Cape Winelands • Urban (township) culture, cultural villages e.g. Lesedi, Shakaland • Victoria Falls, Wild Coast, Namib Desert, SA Garden Route

The above summary and variety of package options contained in Annex B demonstrate that Africa has been blessed with a rich variety of nature and culture resources and that the continent is able to provide a wide range of exciting and unique travel experiences, mostly anchored in authentic culture and nature.

2.7 Support services

While Africa is resource- rich and the continent should be in a position to offer global visitors exceptional tourism experiences, many countries on the continent currently lack the required support infrastructure and services to unlock their tourism potentials. Background research, opinion leaders interviews (see Annex A) and the survey of tour operators (see Chapter 3) reveal the following status of tourism support services:

- ***Accommodation and hospitality***

  - The key tourism destinations in Africa such as Egypt, South Africa, Morocco, Kenya, Tunisia and Tanzania offer a wide variety of quality accommodation across the spectrum ranging from five-star hotels to home stays.
  - At the upper end of the market the majority of African cities are well served by high quality international hotel groups from Europe (Hyatt, Sheraton, Accor, etc.) and more recently from Africa (Southern Sun, Protea Hotels, Serena, etc.).
  - Safari destinations like Kenya, Tanzania, South Africa, Botswana, Namibia, Zambia, etc. are world-renowned for luxury safari lodges while various Indian Ocean Island offer luxury island lodge retreats.
  - As a result high end tour operators rate the quality of accommodation and food highly.
  - However, in most developing African countries there is a major gap in capacity at the middle, tourist end of the accommodation market that is mostly patronized

by independent budget-conscious travellers. While high quality business hotels and budget-level accommodation facilities are in fair supply two to three stars, professionally managed accommodation is limited and value for money is often suspect.

- Accommodation capacity in many developing destinations with growing, but small leisure markets is particularly limited in rural tourism areas and around national parks and cultural sites. Investors regard such areas as risky due to operational challenges and demand barriers and fluctuations.
- Accommodation standards often lack at facilities that do not carry known brand names and consistent quality standards. While some countries like Kenya, Morocco, Tunisia and South Africa have functional and market-based hotel grading systems, some others are new at implementing grading systems (e.g. Botswana, Tanzania) as opposed to many other countries not having worked hotel grading systems. Operators to such countries rely on international hotel brands to secure consistent quality, often resulting in high leakages and repatriation of tourism profits.

  Initiatives that have been started in East and Southern Africa to develop regional accommodation standards for application by individual countries should be supported.
- With word-of-mouth and social networking on the internet becoming increasingly important influencers of tourism movement and loyalty and potential travellers having instant access to travel ratings of their fellow travellers, the limited variety and inconsistent quality and value for money of tourist-class accommodation are major challenges for market expansion, especially in pursuing more mature, independent market segments.
- While most African countries have a heritage of unique and tasty food, the variety and sophistication of tourist-oriented cuisine is often very limited in developing tourism destinations. Knowledge of visitor preferences and tastes is mostly limited among local restaurateurs and aspects such as hygiene and preparation standards often lack.
- The domestic travel markets of many developing countries and regions is small partly due to small, upcoming economies with limited domestic business travel but also the lack of a travel culture and disposal income to travel among the majority of citizens. South Africa, for example, has initiated major domestic travel campaigns and a “tourism month” campaign to promote tourism among citizens.
- While many governments include tourism under general investment incentive schemes such as exemption of import taxes and tax holidays, few countries have suitable, dedicated incentives schemes aimed at tourism capital investment and geared at reducing the risks associated with slow and difficult market entry, acute cash flow challenges during start up years and demand fluctuations due to externalities, seasonality, etc.

- o Japanese operators cited "improved health and hygiene" as the second most important challenge facing African destinations, after "improved safety and security". Japanese respondents were split in their views regarding quality of accommodation and food, with ratings equally split between "excellent", "good", average" and "poor".
- o Developing destinations are clearly in need of support systems and schemes to improve the quality and depth of hospitality services.

- ***Access and infrastructure***

- o The challenge of limited and expensive air access is addressed in Chapter 2.4.3 above and in an era of low cost airlines, visitor time constraints and last minute travel decisions it is clearly one of the most challenging aspects of tourism growth in Africa.
- o Emigration procedures and requirements have improved substantially in most African countries during the past five years. Many destinations offer visa-on-arrival services and visa costs and turnaround times are mostly realistic. Tour operators and opinion leaders interviewed do not regard emigration procedures as an important challenge.

  Visas do become an issue when considering regional travel routes and circuits. Multiple visa payments add substantially to the cost of cross-border travel. Regional tourist visas are being pursued in East and Southern Africa. In the interim practical solutions, such as reduced costs for multiple regional entries should be pursued.
- o A key obstacle to unlocking the natural and cultural tourism potential of many developing destinations in Africa is the lack of internal road and air access to key tourism sites and conservation areas. Many unique tourism resources such as national parks, cultural sites, historical landmarks and scenic areas are only available by 4-wheel-drive vehicles and by air. While it could be argued that such limited access serves to retain the environmental and cultural integrity and value of some attractions, it more often is a major limitation for tourism expansion where it is most needed.

  The need for improved internal air and ground transport was cited as major challenges by both tour operators and destination opinion leaders.
- o While there is no doubt that improved road and transport systems are keys to unlocking Africa's tourism potential, such improvements need careful and selective planning given Africa's often fragile and sensitive resource base.
- o Africa's airport infrastructure has improved substantially during the past decade as governments have realized the importance of airport infrastructure for accommodating the large fleets of wide-bodied aircraft that rule the skies. Airports are also important symbols of countries being open to business and operating at a global level. While international airports are generally of a good standard, domestic airport infrastructure is often of a poor standard.

- ***Other services***

While access and accommodation are key support services, some other service aspects need attention, including:

- Supply linkages need to be fostered as tourism revenue leakages are high in many destinations due to most goods and services being imported. As indicated in Chapter 2.1 Africa attracts more than 3% of global tourism receipts while the continent's share of global tourism GDP is just more than 1%. A holistic approach to tourism development in Africa should be encouraged, focusing on both direct industry development and the provision of support services and products to the industry.
- Limitations in information technology systems and bandwidth are mentioned elsewhere; however the importance of good internet access for tourism business efficiency and visitor communication purposes cannot be overemphasised. Initiatives to improve bandwidth, availability of computer systems and internet affordability should be strongly encouraged.
- Similarly, while fixed line telecommunications have limited networks in many countries, the entrance of cellular networks has opened up new possibilities for remote communities and attractions to have contact with the outside world and to reduce the risks of travel to remote areas. Governments should work closer with cellular line providers to ensure availability of services at key tourism spots.
- While foreign exchange and international banking processes function well in most tourism countries, credit card usage and technology are limited in many areas and visitors are often ill-informed regarding the limitations and pitfalls associated with cash availability and exchange. Visitor information in this regard should be improved and tourism authorities should liaise with the financial services sector to improve systems where possible.

2.8 Industry maturity

Tourism is a new industry for most African countries and has only been acknowledged as a major potential economic force in most African countries during the past 15 -20 years. As a result many countries have not yet developed a professional tourism culture and tourism industries are often highly fragmented, suffering from a lack of cohesion and cooperation among government and private sector. The following brief assessment is based on stakeholder and tour operator interviews.

- ***Safety, security and hygiene***

- Tour operators interviews (see Chapter 3) rated safety and security as one of the key challenges facing Africa's tourism advancement. The World Economic Forum's (WEF) tourism competitiveness rating presented in Table 5 indicates that safety and security varies considerably among African countries, with only three African countries ranking among the 10 worst performers in the area of safety and security.

- o The impact of regional perceptions is addressed in Chapter 2.4.3 above.
- o While safety and security concerns may largely be of a perceptual nature for many destinations, they are a reality for a number of others and act as a major barrier for tourism growth in countries like South Africa, Kenya, Ethiopia, Côte d'Ivoire, Nigeria and others, as indicated in the competitiveness table. Excellent initiatives have been implemented by some destinations including close circuit television security in urban areas (e.g. Cape Town), increased awareness and training of police and special tourist police patrols (e.g. Zimbabwe, Egypt, etc). Such initiatives should be further encouraged.
- o The South Africa government has launched a major security drive in anticipation of the 2010 FIFA World Cup and has assured visitors of excellent security during the tournament.
- o According to the WEF rating, African countries are the worst performers in the area of health and hygiene. Much can be done to improve this poor standing e.g. intensified training in areas of hygienic food preparation, improved communication regarding the availability of potable water and alternatives in this regard, visitor alerts and information regarding infectious diseases such as HIV/AIDS, H1N1 virus, etc.
- o The quality and availability of emergency medical and rescue services varies among Africa destinations and regional initiatives to forge cooperation in this regard should be encouraged.

- ***Quality and service***

- o All opinion leaders interviewed (see Annex A) agreed that the poor service levels are among the two to three most important obstacles to tourism growth in their countries and regions. With few exceptions opinion leaders rated service and skill levels in the industry as poor.
- o As indicated in the previous section, some leading and established hotel groups and local tour operators in Africa provide exceptional product quality and service and many of these have been acknowledged as such in international traveler surveys and polls, with African operators in countries like South Africa, Kenya, Tanzania, Namibia, Botswana and the Indian Ocean Islands receiving regular accolades for rating among the world's best luxury lodges, retreats and hotels.
- o Inbound tour operator companies and DMCs are generally of good quality and as can be seen from the results of the tour operator survey presented in Chapter 3, most international outbound operators make us of DMCs in servicing Africa.
- o Issues such as visitor protocol, friendliness and promptness of service, visitor interaction and communication, attention to service detail and practical skills are lacking in most developing tourism destinations in Africa.
- o Opinion leaders have cited attitudinal issues such as tourism jobs being perceived as menial and of a low status, the lack of incentives for good service (e.g. a compulsory service charge rather than a tipping culture in some countries) and the limited career prospects in tourism as obstacles to good service.

- Stakeholder interviews have highlighted a lack of high quality hospitality and tourism training facilities in most African countries. While the Association of Hospitality Schools in Africa (www.ahssa.net) includes some member schools of international standing such as the Utalii College in Kenya, the Cape Town Hotel School, the Mauritius Hotels School, the Johannesburg University Hotel School and others, stakeholder interviews in countries visited have highlighted major gaps in quality and relevance of tourism and hospitality at other institutions, such as the Hospitality and Tourism Training Institute in Zambia.
- Some key challenges mentioned include the training and retraining of lecturers, improvement of curricula to include the latest trends and developments in hospitality services and practices, improved training equipment such as computers and kitchen equipment, etc.

- ***Government support***

- Table 5 (WEF Competitiveness Index) shows a clear correlation between tourism competitiveness and the priority given to the industry by country governments. Mauritius, the highest ranking country in Africa in terms of tourism competitiveness is also the number 1 country in the world in terms of the priority given to tourism.
- While African governments are increasingly realizing the potential value of tourism, opinion leaders and tour operators surveyed cited the lack of practical government support in the form of increased budgets and appropriate operating and investment incentives, as one of the biggest challenges facing industry development.
- While the nature and extent of tourism development incentives in Africa require further study and analysis, the following types of incentives, provided by governments and international financing agencies have emerged from stakeholder interviews:
  - Tax advantages, such as exemption or reduction of import duties on vehicles, materials and equipment, accelerated tax write-off provisions, exemption of VAT during start-up phases, etc.
  - Land concessions, e.g. developers afforded limited lease charges during start-up years in new tourism areas in return for capital investment, local employment creation, etc.
  - Marketing assistance schemes through subsidies for international sales missions, attendance of marketing fairs and road shows, etc.
  - Cash subsidies and payments based on committed, real expenditures by small and medium enterprises during the first years of business establishment.
  - Access to finance for new entrepreneurs, including small business financing schemes, soft-structured loans and loan guarantee schemes.
  - Skill development incentives including skills levies, training subsidies and bursary schemes.

- Technical support schemes for tourism business development, planning and operational management

2.9 Major tourism initiatives

Two major initiatives, namely the 2010 FIFA World Cup and the development and expansion of Transfrontier Conservation Areas could play an important role in advancing sub-Saharan Africa's tourism potential during the next few years.

- ***2010 FIFA World Cup***

o The 2010 FIFA World Cup will bring the Soccer World Cup to Africa for the first time, from 11 June to 11 July 2010.

o 32 teams will play in eight groups in the tournament in 48 matches during round 1, whereafter 16 teams will advance to the second round followed by the semifinals, quarter finals and finals on 11 July 2010. Matches will be played at 10 stadiums in nine host cities in South Africa (Johannesburg has two venues).

o The tournament is expected to generate the following visitor numbers and expenditure[9]:

  - 358 000 foreign tourists to the event (51 000 from Africa)
  - R7.3 bn (approximately US$9 billion) in foreign spending, of which R5.3 bn (approximately US$6.5 bn) will be by foreign spectators.
  - 1 million spectators (1.5 – 1.7 million tickets)
  - ± 115 000 domestic tourists
  - 35 – 40 billion cumulative TV viewers
  - 18 850 media

o The FIFA organizing committee reports that various initiatives are being undertaken to capitalize on the World Cup (http://www.sa2010.gov.za) e.g.:

  - Angola, Botswana, Lesotho, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe are collectively using the World Cup to develop the seven transfrontier conservation areas (TFCAs) in the region (see section below on TFCA's). This TFCA route will offer tourists the unforgettable experience of two oceans, vast landscapes, major rivers, deserts, canyons, mountains and diverse cultures across the nine countries in one trail. 2010 TFCA developments include joint marketing, development of services and packages, investment and infrastructure and ease of movement for tourists across borders.
  - Some accommodation will be contracted from South Africa's neighbors.
  - The 2010 World Cup is stimulating development in neighboring countries. For instance, Mozambique will spend $51 million on the rehabilitation of a railway line between Maputo and South Africa, and is also upgrading its road network.

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[9] Grant Thornton, 2008.

Mozambique is investing $600 million in new hotels, casinos and other leisure facilities.

- The Information and Communications Technology Broadband Infrastructure Net (Uhurunet) of the New Partnership for Africa's Development (NEPAD)is a US$2 billion submarine cable to connect Africa directly to India, the Middle East, Europe and Brazil. The 50 000-km cable will reduce the telecommunications costs in Africa. The cable will be completed to provide telecommunications for the 2010 World Cup.

o At the time of publication the Asian teams had already qualified namely Japan, Korea DPR, Korea Republic and Australia and the tournament clearly offers Africa with a tremendous opportunity of generating increased visitor numbers and awareness in Asia.

o The event also accords Africa the opportunity of learning about Asian travel preferences and requirements and every effort should be made to use the event as a catalyst for travel trade education programmes regarding Asian markets.

o The locations of teams in South Africa are not yet known and this information will only become available following the final draw in December 2009. Information on pre-tournament training locations is also being kept confidential by the various teams.

o While the majority of direct activities will accrue to South Africa as host country, various opportunities exist for other African countries to capitalize on Asian attendance and coverage of the event e.g.

  - Promotion opportunities: African countries can piggyback on a successful World Cup to address negative travel concerns and perceptions, through coordinated and planned communication initiatives. The FIFA local organizing committee (LOC) has indicated that it is planning "Africa Villages" in the main venue cities where African countries will be able to exhibit their countries. The World Cup provides African countries with a captive audience and is an excellent opportunity for promotional initiatives such as PR campaigns, advertising and other promotions and competitions.

  - Travel trade education: African destinations are expected to capitalize on the interest in Africa generated during the run-up to the Cup and to engage Asian travel operators in familiarization and education programmes of the region.

  - Media coverage: almost 19,000 foreign media are expected to attend the event, presenting African countries with an ideal opportunity to communicate their country's travel assets and opportunities.

  - Accommodation: One of the challenges facing the organizers is that of securing adequate accommodation for fans in South Africa. FIFA's hospitality company has indicated that it has already signed up accommodation as far a field as Mauritius, introducing a concept of "MATCH Villes" where fans will be based at holiday locations far from match venues from where they will be flown to matches. Other countries that could benefit from this scheme are Namibia, Mozambique, Lesotho, Swaziland, Botswana, Zimbabwe and Zambia.

- Pre- and post trips: with many visitors travelling a long way to attend the event it is expected that there will be substantial interest in extended travel before and/or after the event. Coordination with tour operators could be strengthened to put together a variety of innovative regional travel options.
- Art and craft exports: African art, crafts, music, etc. will no doubt be in great demand during the tournament and coordinated efforts are expected to be launched to provide opportunities for art and craft sales during the event.

• ***Transfrontier Conservation Areas (Peace Parks)***

o The TFCA initiative, pioneered by the Peace Parks Foundation seeks to facilitate the establishment of a network of cross-border conservation areas, by consolidating major nature parks in African countries (Peace Parks Foundation, 2009). There are currently 14 TFCAs, mostly in Southern Africa, namely:

- Ai-Ai Richtersveld Transfrontier Park: Namibia-South Africa (Treaty signed)
- Kgalagadi Transfrontier Park: Botswana-South Africa (Treaty signed)
- Limpopo/Shashe TFCA: Botswana-South Africa-Zimbabwe (MOU signed)
- Great Limpopo Transfrontier Park: Mozambique-South Africa-Zimbabwe (Treaty signed)
- Lubombo TFCA: Mozambique-South Africa-Swaziland (MOU signed)
- Maloti-Drakensberg TFCA: Lesotho-South Africa (MOU signed)
- Iona-Skeleton Coast TFCA: Angola-Namibia (MOU signed)
- Liuwa Plain-Mussuma TFCA: Angola-Zambia (MOU pending)
- Kavango-Zambezi TFCA: Angola-Botswana-Namibia-Zambia-Zimbabwe (MOU).
- Lower Zambezi-Mana Pools TFCA: Zambia-Zimbabwe (MOU pending)
- Malawi-Zambia TFCA: Malawi-Zambia (MOU signed)
- Niassa-Selous TFCA: Mozambique-Tanzania (conceptual)
- Mnazi Bay-Qurimbas TFCA: Mozambique-Tanzania (conceptual)
- Chimanimani TFCA: Mozambique-Zimbabwe (MOU signed)

o Consolidating vast tracts of conservation land will assist in enhancing Africa's status as the ultimate wildlife and nature destination and will open up opportunities for investment in nature areas. While much work is required to bring the concept to its full potential, TFCAs such as the Great Limpopo TFCA and the Kgalagadi TFCA are already operational.

o The Peace Parks allow travelers the opportunity of traversing various countries territories inside parks without having to clear immigration, will reduce visitor densities and congestion in conservation areas and will eventually lead to the standardization of park fees and quality of visitor services.

o UNWTO is carrying out a feasibility study to establish a network of transfrontier conservation areas in West Africa.

3. The business of tour operating in Africa

3.1 Survey methodology

- An online, internet-linked survey was conducted among a sample of international outbound tourism operators to Africa during the period 17-25 August 2009. A judgmental sampling technique was used, by scanning operator databases and selecting operators that have included Africa in their portfolio.
- In accordance with the market segmentation approach explained in Chapter 2.4.2 the selection of operators focused on those companies that include a spectrum of travel of to Africa and operators that focus mainly on beach resort tourism. Beach resort operators serving North Africa are more aligned to the issues affecting the Mediterranean than Africa and these operators were excluded. Operators to North Africa included in the survey were those that offer a spectrum of culture and nature.
- As a result the survey has a slight bias towards sub-Saharan African operators.
- Personal invitations to participate were sent out to 320 international tour operators. Of these 47 usable responses were received, a response rate of 15%, which is in line with the low response rates to be expected from such online surveys.
- However, many of the larger operators responded and the respondents collectively handle approximately 1.9 million visitors worldwide per annum, at an average of about 40,000 per operator and 150,000 visitors to Africa per annum, at an average of about 3,200 per operator.
- The distribution of respondents by passenger numbers is as follows:

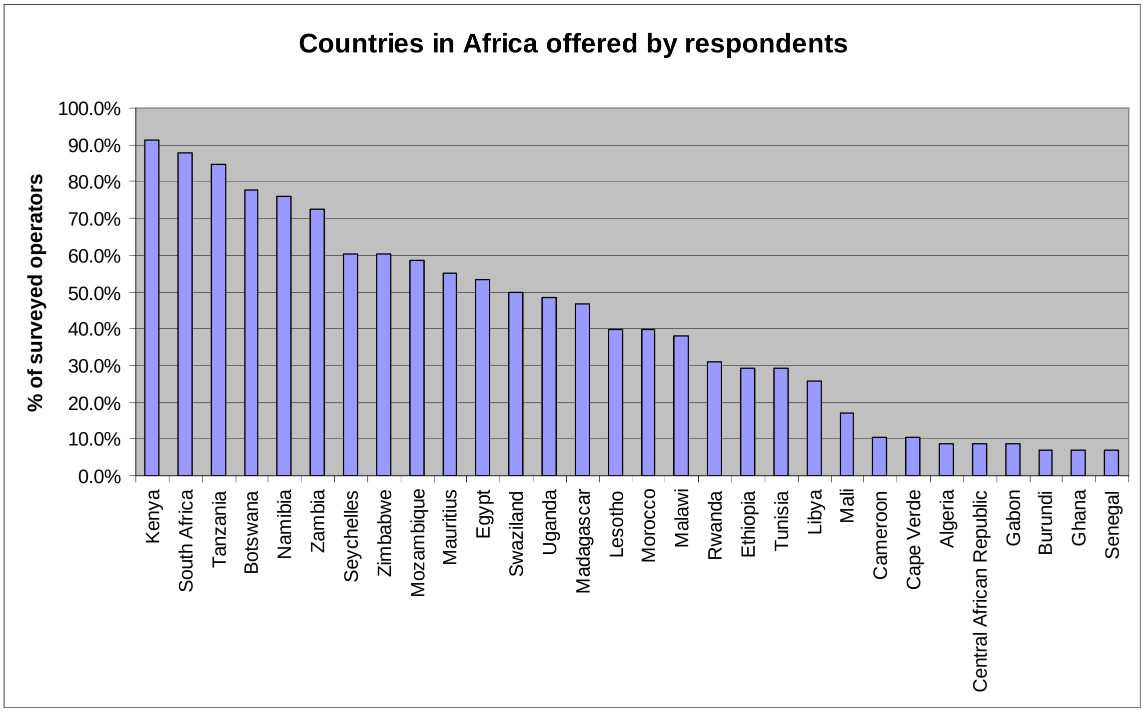
Area	**Passenger numbers of operators surveyed (2008)**[10]			
	1-1,000	1,001 – 10,000	10,001 – 50,000	50,000+
To World	16	17	5	6
To Africa	24	16	4	-

- The distribution of respondents by countries is as follows:

Country	**USA**	**Nether-lands**	**UK**	**Ger-many**	**Italy**	**Scandi-navia**	**Japan**	**Belgium**	**France**
Responses	10	7	4	4	3	9	7	2	1

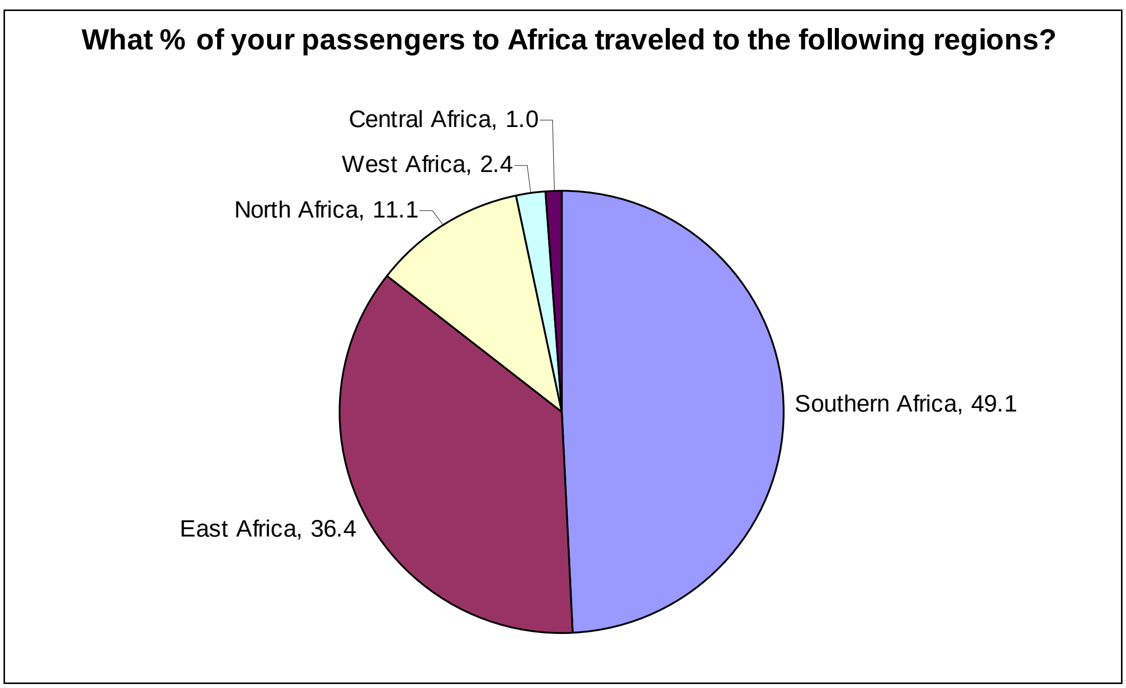
- Between them the operators surveyed cover all countries in Africa, except Somalia. The graph below presents the percentage of operators covering the main destinations, showing countries mentioned by four or more operators.

[10] Information regarding passenger numbers was provided by 44 respondents

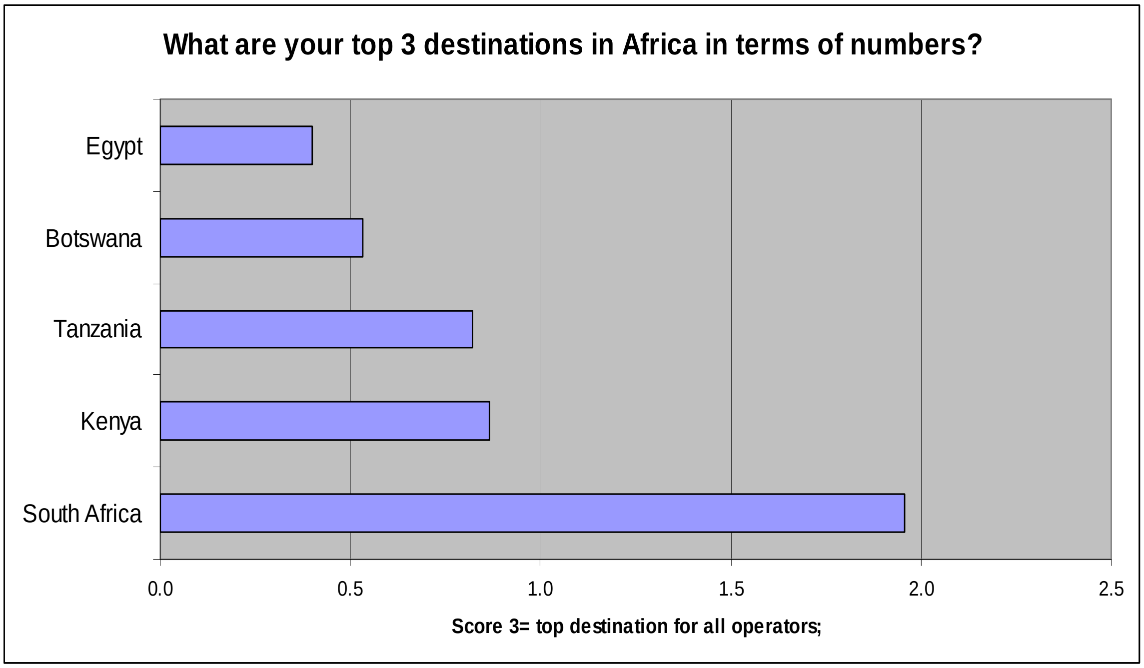


3.2 Key regions and countries covered

- As indicated in Chapter 3.1 the focus was mainly on operators that sell non-mass Mediterranean tourism experiences.
- In this regard East and Southern Africa are favorite destinations for visitors seeking an African experience, with North Africa having a share of around 11%, mainly based on cultural and desert exploration.

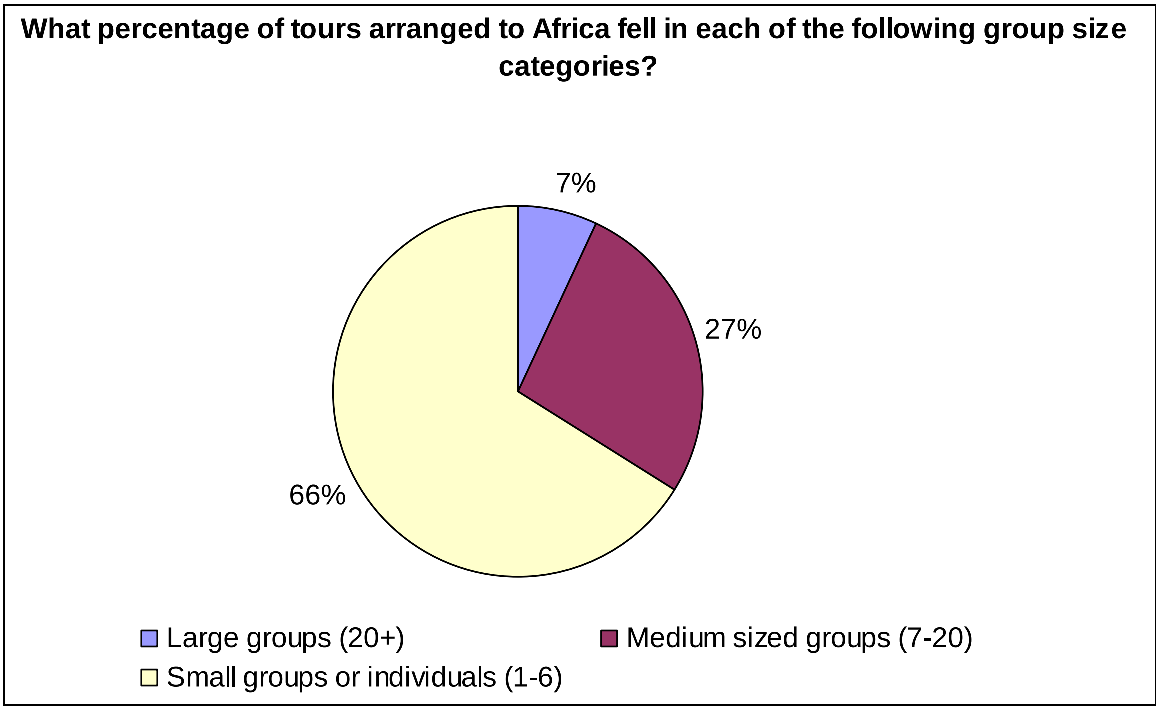


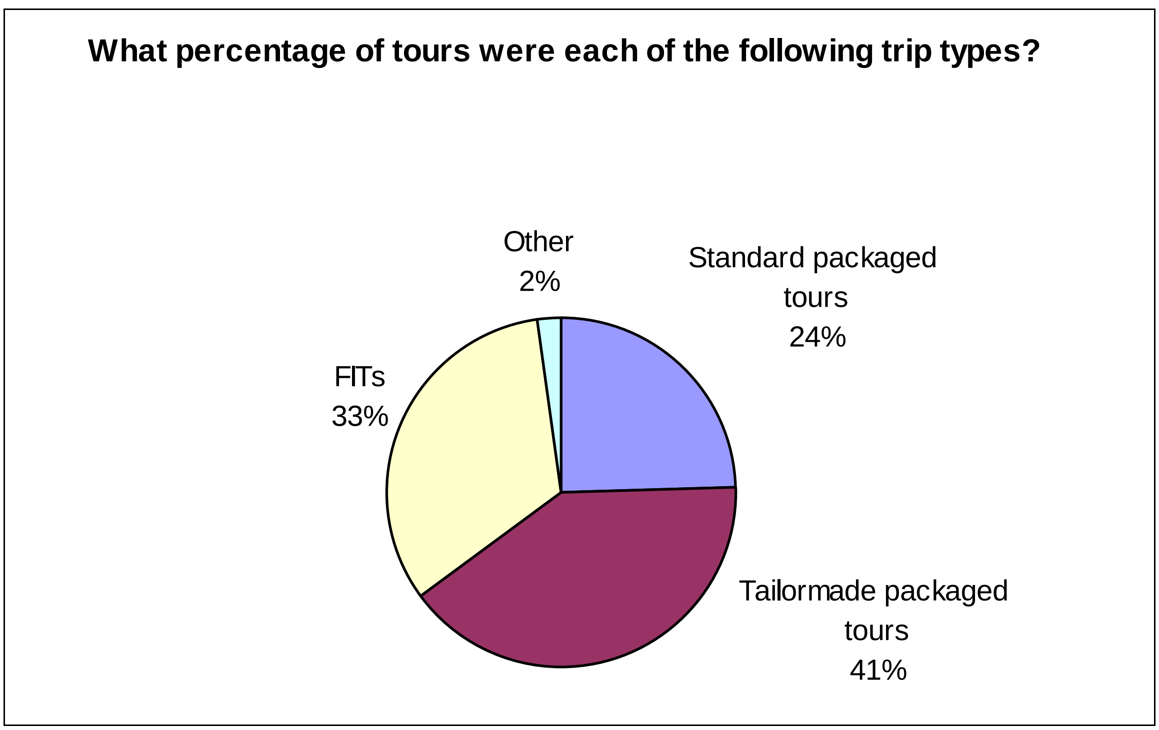
- Respondents were asked to list their three highest volume destinations in Africa and scores of 3, 2 and 1 were given to the number 1, 2 and 3 countries mentioned, with destinations able to achieve a maximum score of 3.
- South Africa is by far the highest volume destination for most operators, with Kenya and Tanzania mentioned as second largest group of recipients and Egypt and Botswana mentioned by a smaller number of operators.



3.3 Profile of tours

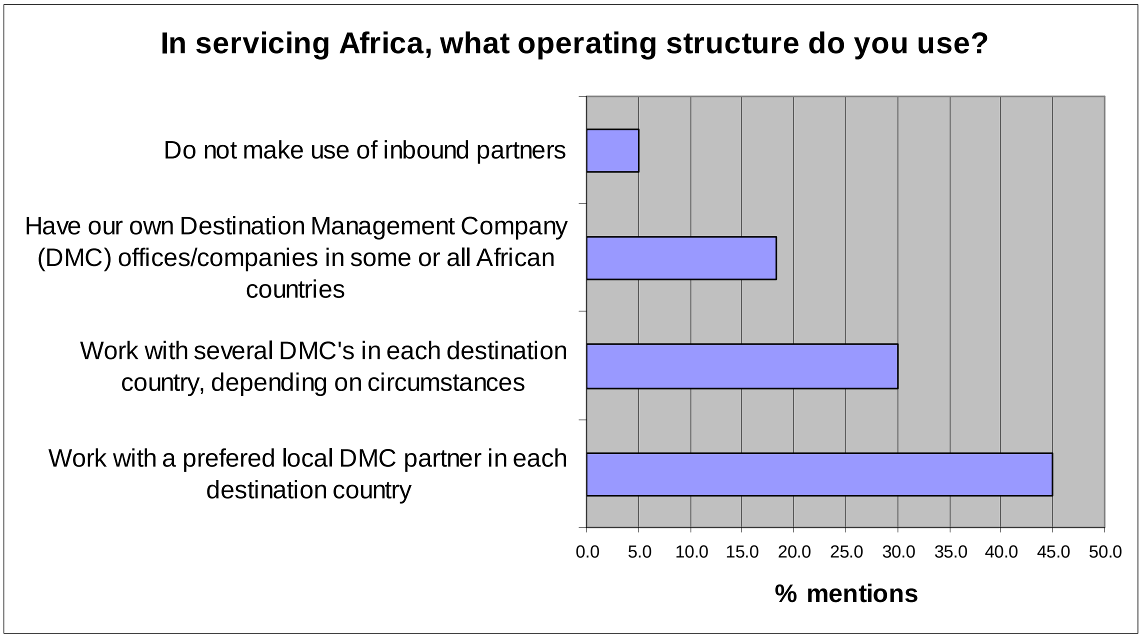
- There is a clear preference for small group travel to Africa from Europe and the USA, with 66% of tours sold by all operators surveyed comprising parties of 1 to 6 persons, 27% comprising medium-sized groups of 7-20 and only 7% comprising large groups of 20+ persons. Mentions of large groups (20+) came mainly from Japanese operators surveyed.
- The average length of tours to Africa reported by all surveyed operators is 12.5 days, with tours by Japanese being on average 7.5 days in duration.
- The size profile of tours of Japanese operator respondents differ substantially from the rest, with Japanese operators indicating a split of 20% small groups, 55% mediumsized groups and 20% large groups.
- The mix of tour types i.e. standard packaged tours (24%), tailor-made packaged tours (41%) and fully independent tours (FITs) (33%) shows a preference for a substantial degree of flexibility and independence when traveling to Africa.
- In contrast Japanese clients favor higher levels of organization and standardization, with tours sold comprised of 54% standard packaged tours, 30.7% tailor-made packaged tours and 15% FITs.


What percentage of tours arranged to Africa fell in each of the following group size categories?
7%
27%
66%
Large groups (20+)
Medium sized groups (7-20)
Small groups or individuals (1-6)


What percentage of tours were each of the following trip types?
Other 2%
Standard packaged tours 24%
FITs 33%
Tailormade packaged tours 41%

3.4 Preferred partner relationships

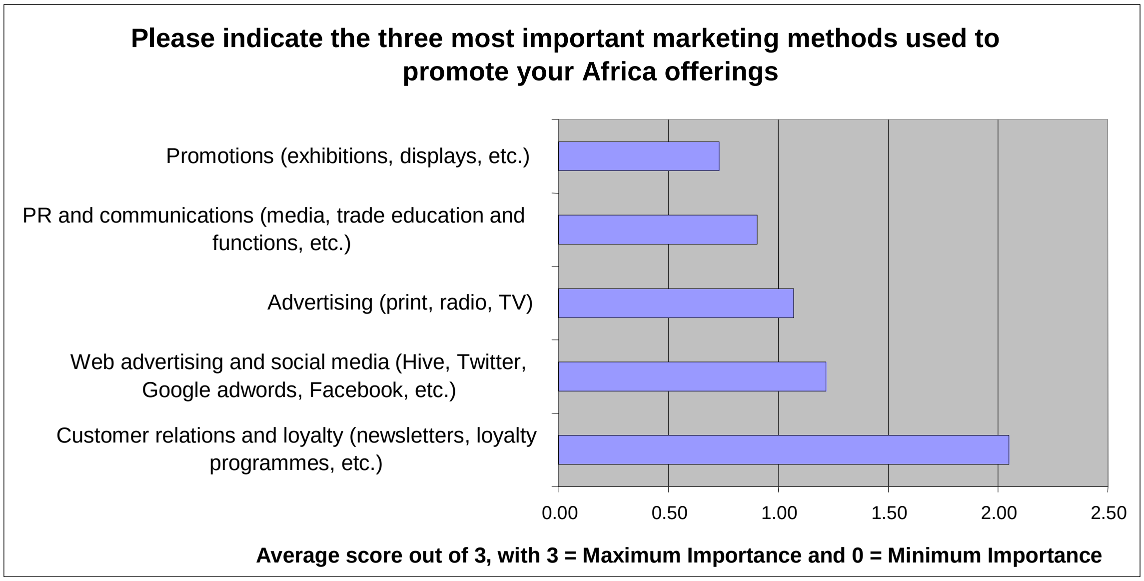
- The majority of operators surveyed (45%) are contracted to a preferred destination management company (inbound DMC) for delivering tours, while a further 30% work with several DMCs depending on the product required. A further 18% have their own DMC in some or all African countries and a small percentage (5%) of operators word directly with product suppliers.
- The operating structure is different for Japanese operators surveyed, with 57% working with DMCs (compared to 75% for the overall survey) and 43% having their own DMCs in Africa (compared to 18% for the overall).

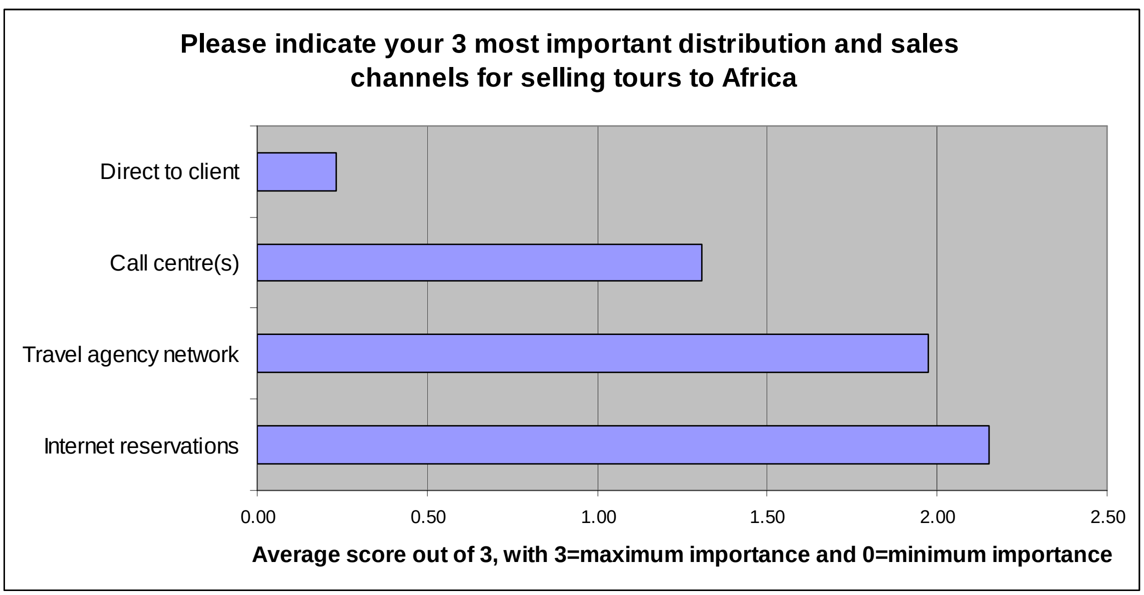


3.5 Marketing and distribution

- When asked to identify the three most important marketing methods used operators cited customer relationship management (CRM) initiatives as most important (scoring 2.1 out of 3), with web marketing and search engine optimization (SEO) second most important (scoring 1.2) followed by advertising, PR and promotions.
- The findings underline the non-mass, individualistic nature of travel to Africa with visitors relying of word-of-mouth and endorsements for deciding on travel to Africa.
- Internet references/reservations (most important) and travel agency sales are the most important sales channels.
- Japanese operators also rely heavily on CRM marketing (cited by 75% of respondents as the most important market channel), but rely more heavily on advertising with web marketing not scoring high.

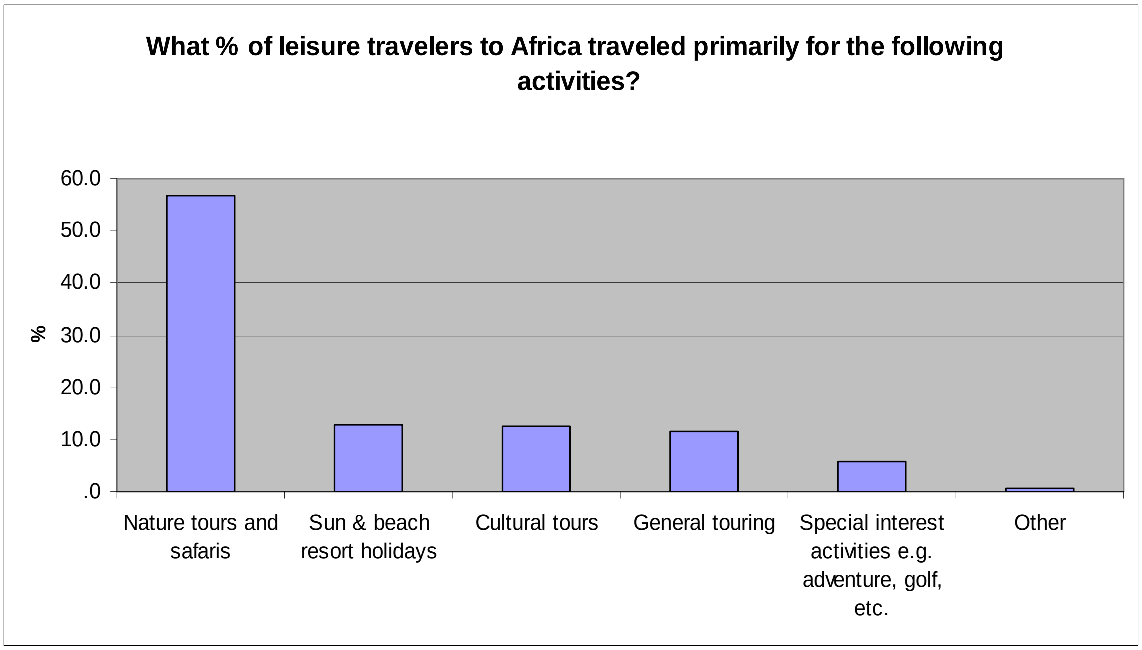
- More than 85% of Japanese operators cite travel agency networks as their most important sales channel with internet references/reservations coming in as second most important.





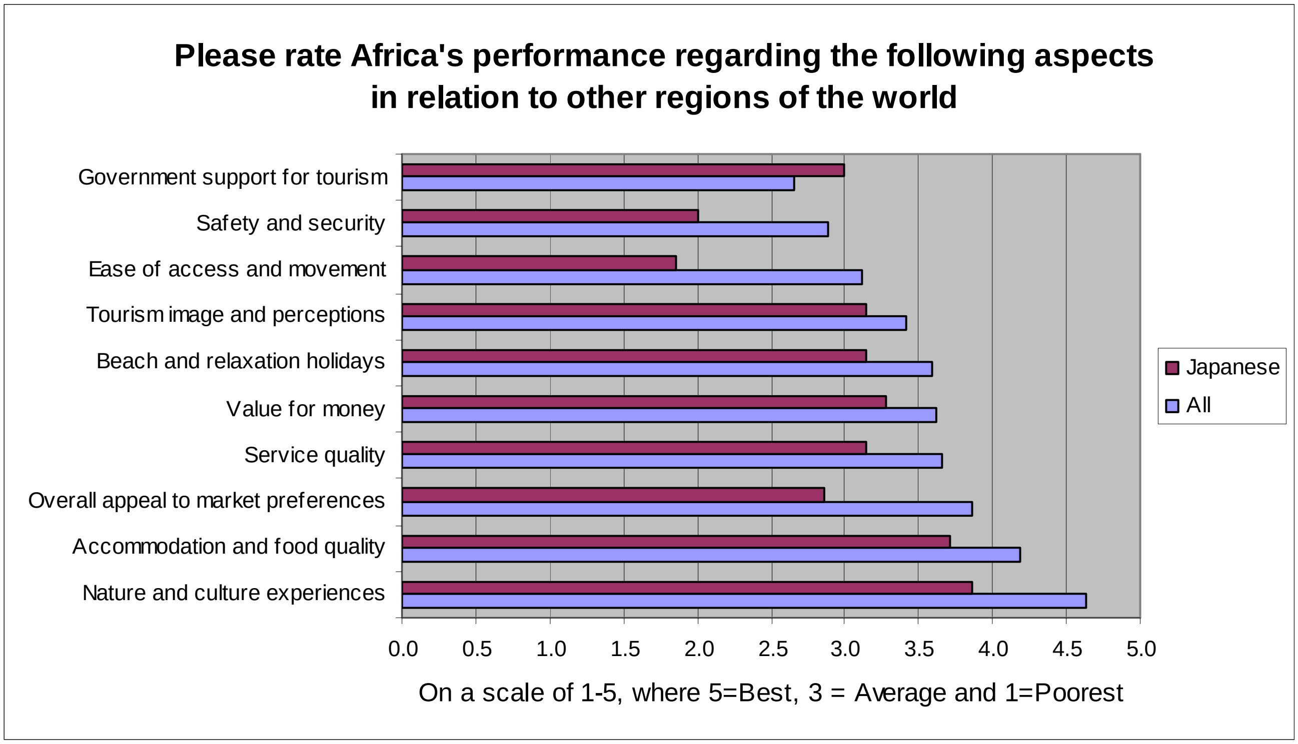
3.6 Africa's positioning and competitive advantages and disadvantages

- As stated previously Africa's nature and wildlife attractions are clearly its unique selling proposition, with almost 60% of operator clients traveling for this purpose. Sun and beach holidays, cultural tours general touring each account for a further 11% of travelers, with special interest traveling comprising around 6 % of operator clients.
- Among Japanese operators surveyed only about 40% of clients travel primarily for nature and wildlife, with a significant 36% and 16% preferring general touring and special interest experiences, respectively. Sun and beach holidays do not feature among Japanese operator clients.



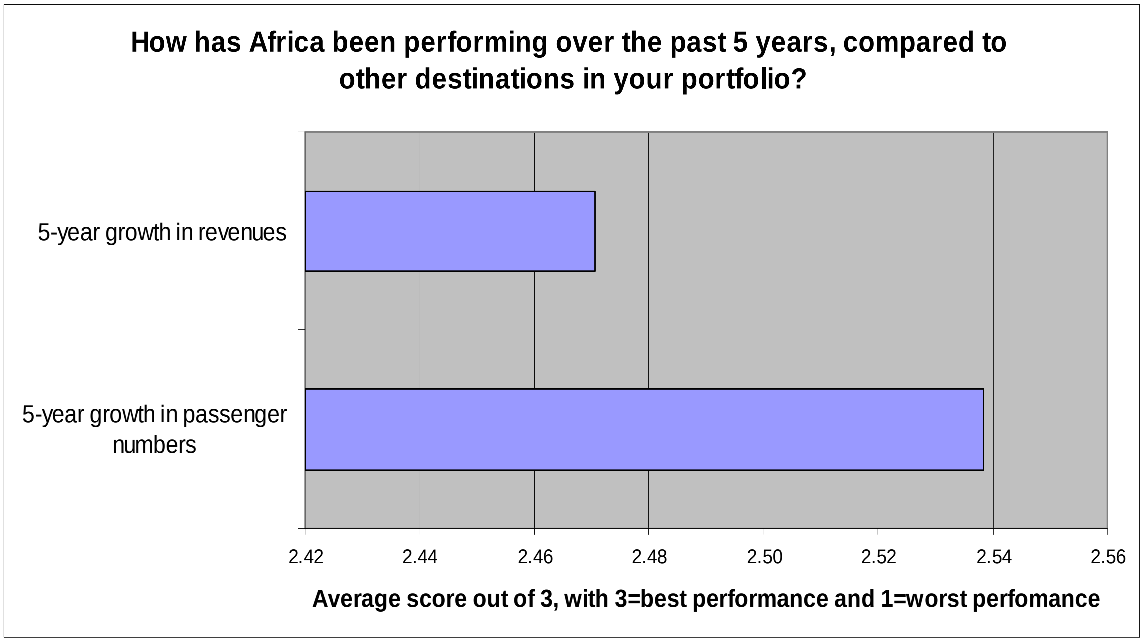
- In line with the abovementioned findings, operators rate nature and culture experiences in Africa particularly high, with accommodation and food quality and overall appeal to market preferences also rated highly. Ease of access and movement, safety and security and government support for tourism are rated poorly.
- The ratings among Japanese operators follow a similar pattern, with a few important exceptions. Ratings for all aspects other than government support for tourism are consistently lower than those of all operators, indicating high expectations and standards of Japanese travelers. Japanese operators also gave safety and security and ease of access and movement much lower scores than their counterparts in Europe and the USA. In rating Africa's overall appeal to market preferences Japanese respondent ratings for Africa are much lower than those of their counterparts elsewhere (2.5 on average compared to 3.5 for all operators).

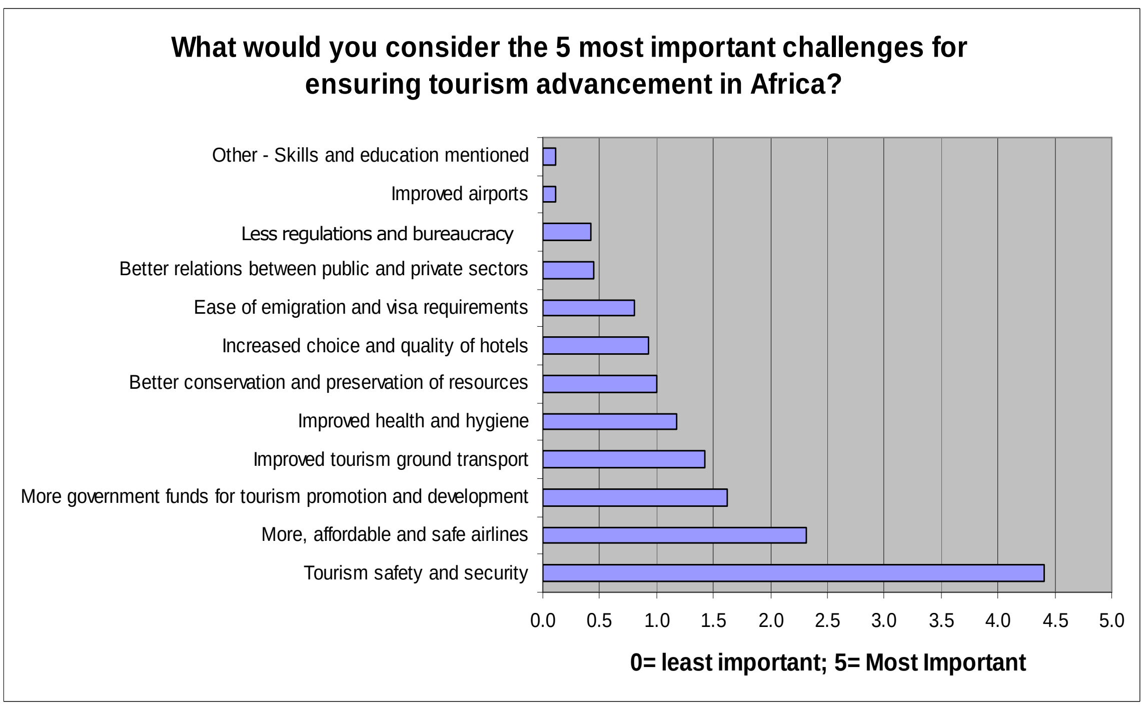
- This finding highlights the importance of tourism operators and authorities in Africa being well- informed and educated regarding the travel habits and preferences of the Japanese market.



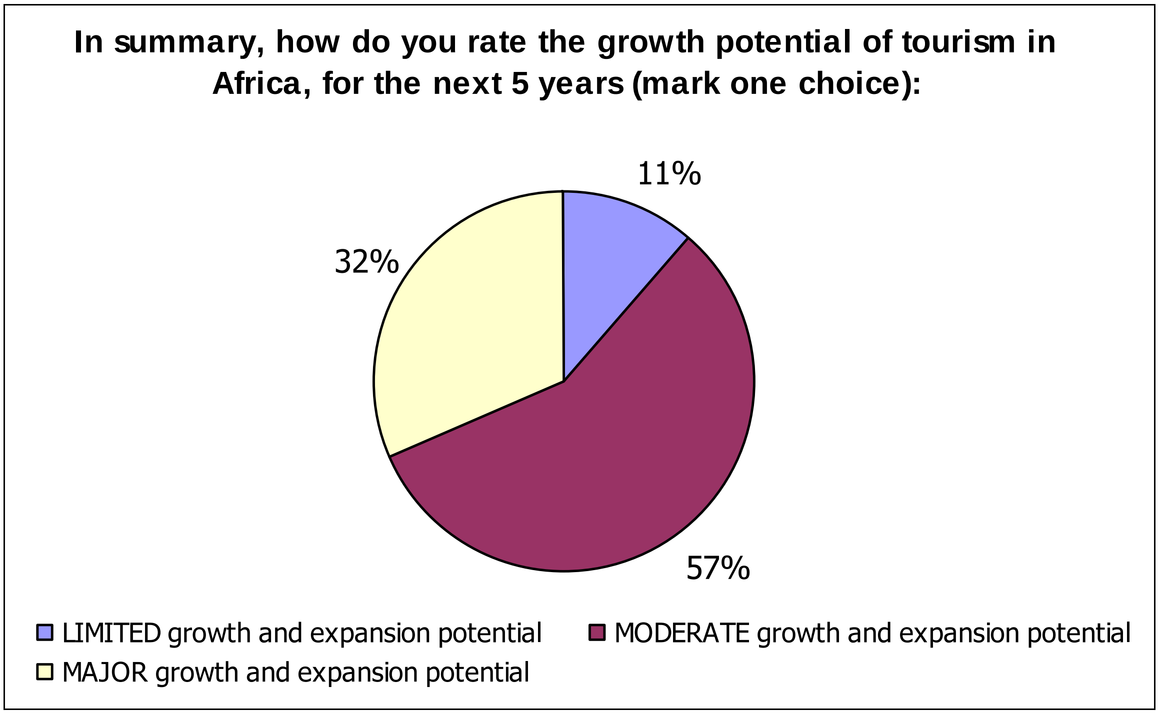
3.7 Africa's tourism performance

- The majority of respondents rate the growth in both passenger numbers and revenue to Africa as exceeding those of other destinations in their portfolios. However, positivity with regard to growth in revenues is lower than for growth in numbers. Japanese operators indicate the growth in revenues to Africa as being similar to other destinations.
- The indication by operators that growth in volumes has outstripped growth in revenues is indicative of customers trading down in favour of more affordable travel options. This may be due to the worsening economic situation during the latter half of 2008 and first half of 2009.
- Concerning the most important challenges facing destinations in Africa respondents overwhelmingly selected safety and security as the most important challenge.
- Other important factors mentioned, although being of rated as of lower importance than safety and security are improved airline access and improved government budgets for tourism promotion.
- Japanese operator responses follow a similar pattern, however improved health and hygiene is rated the second most important challenge after safety and security and ease of immigration and visa requirements also score high.





- In summary, 57% of respondents rated Africa's tourism growth potential as moderate, with an encouraging 32% rating it as major. Only 11% of respondents rated it as poor. The ratings received from Japanese respondents are similar.


In summary, how do you rate the growth potential of tourism in Africa, for the next 5 years (mark one choice):
11%
32%
57%
LIMITED growth and expansion potential
MODERATE growth and expansion potential
MAJOR growth and expansion potential

4. Summary recommendations for policy makers and tour operators involved in Asian outbound tourism to Africa

The above- mentioned analysis has revealed a number of important implications for Asian outbound tourism to Africa, of which the following are most notable.

Acknowledging Africa's major tourism potential

- While tourism in Africa is still in its infancy in many countries and the relative size of the industry on the continent is small, the sector already plays an important role in poverty alleviation, job creation, business development and skills development and further tourism development is of vital importance to the social and economic well-being of the continent.
- Although coming off a low base Africa has recorded good growth in tourism receipts over the past decade, indicating a rise in demand for authentic nature and culture experiences offered by the continent. According to the UNWTO, tourism in Africa is also expected to suffer less than other world regions from the effects of the global economic crisis.
- The continent offers an unsurpassed variety and depth of nature and wildlife experiences and allows visitors the opportunity of engaging with unique cultures and lifestyles of many nationalities and tribal groups.
- Opinion leaders interviewed in selected African countries (see Annex A) cited wildlife safaris, gorilla and primate experiences, exploration of waterfalls and water bodies and cultural and food experiences as potential attractions for Asian travelers.
- Opinion leaders identified Japan as the Asian market with the most immediate potential for Africa.
- Available market research indicates that there are growing numbers of mature Japanese travellers who are in search of such unique nature and cultural experiences and Africa should appeal to these travellers who are looking for new areas to discover and explore.

Strategic recommendations for policy makers

While the study has highlighted a variety of issues to be addressed for maximizing Africa's tourism potential, the following two recommendations are considered of prime importance:

- As highlighted the image of Africa as it is projected by the Western media is often biased and this tendency must be reversed. The development of a project proposal for promoting the image of "Destination Africa" as a safe regional travel destination consisting of a variety of sub-brands is proposed. This issue has been discussed at various occasions during regional seminars conducted in Africa and in particular during the AABF V in Kampala.
- As pointed out one of the main reasons for the low level of tourism arrivals from Asia is the limited number of flights operating from Asia to Africa and vice versa.

For Africa to be more competitive in this area, the following objectives should be targeted.

- To increase the number of airlines operating to Africa in general and to Asia in particular.
- To develop partnerships between African businesses and Asian businesses in the field of air transportation and tourism.
- To address the very high cost of air transportation which clearly affects tourism business possibilities in Africa.

Recommendations for the travel trade: African tour operators

- The majority of public and private tourism industry opinion leaders interviewed acknowledged that they know very little about the travel behavior, preferences and requirements of Japanese travelers. There is clearly a major need for training and capacity building in preparing the African travel trade for doing business with Asia and Japan in particular.
- With Japan, Korea Republic, Korea DPR and Australia having already qualified for the 2010 FIFA World Cup, this event offers a unique opportunity for exposing Japanese travelers to Africa's tourism treasures, addressing poor and fearful perceptions of Africa among the Japanese travel public and educating and exposing African suppliers to the needs and preferences of Japanese visitors. It may be valuable for tour companies participating in the 2010 FIFA World Cup to join forces in exposing host industries and communities to the needs of the Japanese market through exchange visits, workshops, etc. The World Cup could be an important catalyst for raising awareness and knowledge of the Japanese market among African destinations and vice versa.
- Combining the highlights of more than one country in cross-border packages should be considered e.g. a combination of a Big 5 safari, gorilla viewing, a trip on Lake Victoria and some cultural interaction may add to the attractiveness and significance of a journey to East Africa. Similarly, a Southern Africa combination of Cape Town, Victoria Falls and the Zulu Kingdom significantly expands the scope of the travel experience.
- It is clear that Japanese travelers have specific interests and travel preferences that differ from those of mainstream African travel markets in Europe and North America. Information regarding some interesting landscape features, fauna, flora and fish species and other special interests attractions and experiences may not be readily available in the general tourism literature given the preoccupation with traditional European markets with a preference for more general nature and safari experiences. African universities and conservation organizations employ leading international experts in natural and cultural resource management and soliciting their knowledge and advice regarding specific areas of interest may provide companies with a competitive advantage.

- Contracted hospitality and tourism suppliers who will have contact with Japanese guests should be equipped with knowledge and understanding of customer preferences and operators should consider liaising with tourism authorities in targeted countries to launch education and awareness programmes relating to the Japanese market.

Recommendations for the travel trade: Japanese tour operators

- Africa clearly offers major potential for providing special interest experiences and providing Japanese travelers with new destination opportunities. While it is tempting to stick with the known, established destinations in Africa, various other destinations offer unique experiences that could appeal to specific interest groups. "Digging a bit deeper" to uncover some of Africa's hidden treasures e.g. cultural traditions and rituals, birdlife, water bodies, etc. may provide companies with a competitive edge and strengthen Africa's appeal.
- Information regarding travel industry incentives offered by African countries is not always properly communicated and easily accessible. It may be useful for operators to conduct a thorough investigation of possible government assistance schemes when entering the African market.
- Most traveler concerns regarding hygiene and safety conditions can be overcome through good communication with destination suppliers and travelers. Obtaining and communicating truthful and factual information regarding issues such as personal safety precautions, disease prevention, water quality, etc. allows visitors to prepare for their journey, avoid unnecessary risks and, most importantly distinguish fact from fiction.
- Travel times and distances in Africa can be long in comparison with those in Japan and careful itinerary planning is important to cover the highlights without over-burdening travel schedules, given the relatively short duration of Japanese trips.
- While the main tourism destinations such as Egypt, South Africa, Morocco, Tunisia, Kenya and Tanzania are able to cope with and accommodate large travel groups, the majority of countries are geared more at receiving small travel parties.
- Securing the services of experienced ground operators, who have track records of operating tours in Africa is the preferred option for arranging tours to most African countries and is essential for operating in developing destinations, i.e. those that do not rate among the top 10 African tourist-receiving countries.
- Thorough homework is recommended in selecting suitable DMCs. Aspects such as financial security, administrative efficiency, access to high quality and specialized tour guides, quality of vehicles and equipment used and at least a basic understanding for the preferences and requirements of Japanese travelers are key requirements, given the relatively novel status of tourism industries of many countries.

- A good starting point for assessing partner capabilities is through the membership of official industry bodies such as private business chambers of public-private tourism boards. Such organizations usually have membership criteria that are aimed at eliminating fly-by-night operators or operators with poor track records.
- Japanese language capabilities are very limited in most African countries and the majority of private operators have a poor knowledge and understanding of the Japanese culture and travel preferences. Good Japanese tour leadership is essential, especially when entering new destinations.
- In striking up relationships with local partners proactive training of partners and suppliers should be considered and maintaining good communication between Japanese wholesalers, DMCs and locally contracted services such as hotels, tourism attractions, etc. is very important.
- Travel agents selling African tour programmes should be exposed to African travel experiences through workshops and familiarization trips and tour operators should collaborate closely with tourism bodies in initiating such educational programmes.

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Annex A: Report on Interviews with opinion leaders in selected African countries

Six countries were identified for individual country studies, namely:

- Tunisia
- Mali
- Uganda
- Rwanda
- Cameroon
- Zambia.

Five of these, namely Tunisia, Mali, Uganda, Rwanda and Zambia were visited by UNWTO experts and interviews were conducted with key opinion leaders. For Cameroon a telephonic interview was conducted with a senior Director in the Tourism Ministry and private sector members completed the questionnaire electronically.

Tunisia

Visit Coordinator: Mr Mauro Pedalino, UNWTO representative, Madrid

Name	Position and Organization
Mr Alfif Maherzi	Deputy Director General, National Tourism Office
Mr Raouf Ghadoumi	Director Marketing, National Tourism Office
Mme Mouna Mathlouthi Ghliss	Director of International Cooperation, National Tourism Office
Mr Zakaria Zgolli	Secretary General, Hospitality Federation of Tunisia

Uganda

Visit Coordinator: Mr Baguma Cuthbert Balinda, Assistant Commissioner Tourism.

Interviews:

Name	Position and Organization
Hon Serapio Rukundo	Minister of State for Tourism, Wildlife and Antiquities
Ms Grace Aulo and staff members	Commissioner of Tourism Ministry of Tourism, Trade and Industry
Ms Babra Adoso	Managing Director, Asyanut Safaris and Travel
Mr William Byaruhanga Mr Edwin Muzahura	Chairman, Tourism Uganda Manager: Marketing and Public Relations
Mr Killian Lugwe	GM, Kampala Serena Hotel
Mr Roger Wamara	Sales and Marketing Manager Brussels Airlines
Mr Moses Wafula	Executive Director, Uganda Wildlife Authority
Mr Stephen Asiimwe	MD, Business Week
Mr Wekesa Masaba	MD, Great Lakes Safaris and Lodges

Rwanda
Visit Coordinator: Mr Emmanuel Werabe, Executive Director Tourism, Rwanda Development Board; Mr Adrien Ngabire, Marketing Officer, Rwanda Development Board

Name	Position and Organization
Ms Rosette Rugamba	Deputy CEO, Rwanda Development Board
Mr Emmanuel Werabe	Executive Director Tourism, Rwanda Development Board
Mr Fidèle Ruzigandekwe	Executive Director, Wildlife Agency, Rwanda Development Board
Ms Jacqui Sebageni	MD, Thousand Hills Expeditions
Mr Patrick Knipping	GM, Hotel Des Mille Collines
Mr Eric Musanganya	MD, Bloom Hotel
Mr Emmanuel Rusera	President, Chamber of Tourism
Dr Anna Spenceley	Senior Tourism Advisor, SNV Rwanda
Mr Gerald Zirimwabagabo	CEO, RwandAir

Mali
Visit Coordinator: Mr Stephane Kefferstein, UNWTO representative, Mali

Name	Position and Organization
Mr Moussa Diallo	Deputy Director Mali Tourism Board, OMATHO
Mr Guillaume Massiera	GM, Radisson Blu Hotel
Mr Hama Bah	Director, Mali Travel and Tours
Mr Modibo Cissé	Technical Advisor to Minister of Tourism and Handicrafts

Cameroon
Telephonic and email interviewing

Name	Position and Organization
Mr Daniel Mukete	First Inspector/Director, Cameroon Ministry of Tourism

Zambia
Visit Coordinator: Mr Joseph Thole, Senior Standards Inspector, Ministry of Tourism, Environment and Natural Resources

Name	Position and Organization
Mr Michael Lengalenga	Chief Standards Inspector, MTENR
Dr Victor Siamudaala	Director, Zambia Wildlife Authority
Mr Donald Pelekamoyo	Tourism Promotions Manager, Zambia Tourism Board
Ms Mubiana Luhila	Director: Museum Development and Marketing, National Museums Board
Ms Josephine Mehl	CEO, Tourism Council of Zambia
Mr Victor Inambwae	Policy Analyst, Tourism Council of Zambia
Mr Stephan Kwint	Operations Manager, Protea Hotels Zambia
Various members	Tourism Council of Zambia
Mr Adrian Penny	GM, Southern Sun Ridgeway Hotel

1 Overall view of tourism potential in your country and region

1.1 In your view, **how has tourism been performing** in your country and surrounding region during the past 5 years?

1.2 What are main reasons for your view?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
– General rating was average to excellent, due to an upward trend in arrivals and substantial investor interest with a number of new hotel developments over the past 5 years. – The good performance should be seen within the context of conflicts in the region (Congo, Sudan, etc.) which makes it more significant. – Despite the additional rooms occupancy rates have risen until the economic recession of 2009. – Minister explains they have moved through various phases • securing country • infrastructure expansion (current) • only then marketing	- General rating was average to excellent. Tourism has been growing rapidly, however from a low base. - Rwanda's choice is to promote high quality and lower volume tourism and improvement of quality and value for money are important challenges. - Some private sector respondents felt that by combining Rwanda with Uganda the depth of offer and market potential could be expanded	- General rating was average to excellent - Arrivals have consistently exceeded global averages during the past few years. - Contraction due to the current economic crisis seems to be fairly well contained - Diversification of tourism experiences - Good increases in cruise tourism and independent budget travel	- General rating was average to excellent. - They have seen a major growth in tourist numbers, receipts, jobs and hotel rooms during the past few years - There is political willingness and a dynamic private sector in support of tourism - There is political and economic stability in the country - Mali's image is very good in Europe and USA, due to a vibrant promotion drive by the Ministry	- Average - Tourism is a new sector - Lack of political will to give it priority; focus on other sectors - Very limited budget for tourism - No dedicated tourism policies or incentives	- General rating was average to poor - Tourism not receiving political support it deserves - Political head changing - Tourism budget very limited, barely covers salaries - View is that leisure tourism happens through private sector efforts

1.3 If you believe there is scope for expansion and growth:

(a) Which countries do you consider as source **markets with the biggest potential**?

(b) In your view, what **types of tourists** are most attracted to your country and region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Western Europe (UK, Germany, Netherlands, Belgium) - USA - Africa - Scandinavia - Asia longer term potential small groups coming through	- UK and German speaking Europe current main markets - USA growing - Africa constant market - Asia longer term potential	- 4 Major European markets are France, Germany, Italy and UK - Secondary markets are Benelux and Spain and also Central/Eastern Europe - Potential for growth from Asia, USA, Middle East	- France, Spain and Italy main leisure markets - New growth markets are Germany, UK, Scandinavia - Asia, Japan and China also picking up with potential - USA and Europe business markets	- France, Germany, UK - Limited USA market - Only approximately 10% of visitors are for leisure - Market scope slowly broadening	- South Africa - UK - Europe –Germany, France mainly to Livingstone - USA for safaris and hunting - Asia limited – extension to Livingstone/Victoria Falls
- Started with budget travelers, increasingly accommodating medium end of market. - Policy emphasizes high value-low volume tourism in view of fragile ecosystems - MICE in Kampala - Special interests: • Birding • Adventure: Rafting, mountaineering • Cultural • Some golf • Religious tourism	- Strong student and volunteer market - Business - aid agencies, embassies - Holiday travel segments still small; aiming at higher end, well traveled and adventurous visitors who appreciate responsible travel - Challenge is to move from low volume-lower spend to low volume-high spend, i.e. quality improvement	- Family beach tourism for middle income families from Europe - Cruise tourism – mostly seniors - Medium sized packaged group tours for long-haul market - Japanese market – mostly add on of 1-2 days for archeological/cultural sites - Increased independent travel market – younger, small groups	- Mature French travelers wanting a cultural experience - Mostly senior executives and professionals, retired and semi-retired e.g. teachers, 40 – 50 years old - Business travelers to Bamako from North America, Europe and Middle East	- Business travelers - Leisure: Cultural and ecotourism - Mostly mature 45 years plus - Hunting	- Business travel large part of market - Leisure - more mature travelers, well traveled looking for an exclusive experience - Mostly return visitors to Africa - Overlanders as an add on - High spend safari market – room for expansion - Expatriate market working in copper belt - MICE – Lusaka, Livingstone

1.4 Concerning the **attractions** in your country and the surrounding region:

(a) What **types of attractions** and experiences have the biggest potential for tourism growth and development?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- USP is Gorilla and primate tours - General ecotourism and scenic beauty - Agricultural tourism; sugar etc. - Adventure (rafting, mountaineering) - Big 5 safaris - Birding - Cultural tourism as supplementary - Longer term: resorts, boat houses, cruises on lake	- USP is Gorilla and primate tours - General ecotourism: rainforest experience, plants, orchids, caves, etc. - Adventure and activity: mountain biking, kayaking, walking trails & canopy walks (16 trails introduced) - Cultural tourism - as complimentary to nature e.g. USA People-to-People - Possibility of water sport on lake - Birding	- Traditional product is middle income beach resorts - Now diversifying, huge potential for other product segments with a culture and nature flavor e.g. desert tourism, rural tourism, ecotourism - Culture both in rural areas and capital - Also more luxury thermal, health and golf tourism	- Cultural tourism - Business tourism in Bamako - Responsible/ecotourism experiences	- Eco/nature tourism - Cultural tourism - Adventure tourism - Conferences – fact that Cameroon is a bilingual (French/English) country is an advantage -	- Wildlife Safaris - Adventure – water, air, land - Cultural experiences as add on and addition to wildlife - Philanthropic/ Volunteer opportunities - Water based activities to the north

(b) Which are the main **destinations that have the biggest potential** for tourism growth and development?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Primates and gorillas – Uganda-Burundi-Rwanda circuit. - Linking up the Congo has potential once situation stabilizes - Combining Serengeti and gorillas - Various regions in Uganda: Bwindi Park (gorillas), Kibale Park (chimps), Rwenzori Mountains, Murchison Falls, Lake Victoria and islands (resorts)	- In Rwanda national parks main assets e.g. Parc Volcanos, Nyungwe Forest, Lake Kivu - Combination of Rwanda, Uganda, Tanzania, Kenya offers wide spectrum, including Big 5 safari, beach resorts, primates, origins of man, etc. - To achieve this working on issues such as single visa, standards, etc.	- Diversification especially to rural and desert areas - Cultural and archeological tourism in capital	- Dogon country, trekking over the escarpment for a cultural experience - Timbuktu - Djenné - Mopti	- Cameroon is a miniature Africa, potential throughout country - Ecotourism experiences throughout region but inhibited by unstable security situation in surrounding region	- Livingstone/Falls – tourism mostly concentrated here but also need expansion - Northern circuit – Luapula, water-based, Kasava Bay - South Luangwa - Lower Zambezi valley - Kafue

2 Your opinion regarding the potential of Asian markets

2.1 How would you consider the **potential of attracting more Asian tourists** to your country and the surrounding region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- In the short term some scope - In longer term major scope	- Some scope for growth, but unsure – numbers still small - Limited knowledge and information of Asian markets. Europe and USA traditional markets	- View is that there is major potential for growth	- Some scope for growth - Growing market potential for cultural tourism	- Some limited scope	- See substantial scope for expansion and growth - Add on to Southern African packages - However, limited knowledge of Asian market -

2.2 What **countries in Asia have the best potential** as a source market for your country/region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- In the immediate term Japan has best potential, region already on map (Kenya, Tanzania, some interest in Uganda). However, country still lacks many of requirements for the market - China in medium to long term – not yet geared for group market seeking highlights - South Korea – high standards, independent travelers	- Japan regarded as market with immediate potential - Rwanda Development Board (RDB) has a staff member in Rwandese embassy in Japan - Small groups – some Japanese groups coming through this year as part of regional tour - Other markets: India (linked to VFR), Korea, Singapore - Unable to handle large Chinese groups	- Japan as an immediate market with China in longer term	- Japan regarded as having immediate potential - China; cooperation agreement and approved destination status (ADS) has been signed with China; longer term potential - South Korea and India also mentioned	- Japan immediate potential - Chinese mostly for business -	- Japan best possibility in short term - China for group tour add-ons to Falls - India

2.3 What attractions and experiences in your country and region appeal the most to Asian travelers?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Photographic safaris East Africa - Gorillas - Rwenzori Mountains - Cultural – Kingdoms, villages - Water (Lake Victoria) channels and lakes	- Gorilla and primate experiences - Cultural and community tourism - Combination with Kenya & Tanzania could add to appeal - Safety and cleanliness of Rwanda major assets	- Thematic experiences e.g.: o Cultural-archeological tourism o Ecotourism o Gastronomic experience	- Business tourism - Cultural tourism, especially Dogon country and Timbuktu	- Conferences - Ecotourism – general nature and scenery - Cultural tourism	- Wildlife - Shopping African crafts e.g. baskets - Special interests – fish and plant species

2.4 What are the biggest **challenges and obstacles for attracting Asian travelers** to your country and region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Air access – distance, costs and time – Japanese have short holidays - Slower travel speed and bumpy rides - Unfavorable perception of Africa and region - Lack of capacity to accommodate and handle larger groups - Language and interpretation lacking - Food quality and suitability not always up to standard - Quality of services not always up to expectation - Difficult market access and gaining trust in Japanese and Chinese marketing channels - Limited understanding and knowledge of Asian markets	- Limited air and expensive access and time to get to the destination - Poor perceptions and lack of knowledge and awareness of Africa - Language and communication – lack of guides - Need a regional circuit and single visa for region - Need improved internet access and capabilities - Service levels require improvement - Better understanding of requirements and culture - Market access and business trust with operators a challenge	- Lack of direct flight connections - Need to diversify product base and image since Asian tourists not attracted by the traditional beach product - In longer term major investments will be required to attract Chinese travelers, currently not justified	- Limited air services - Improved infrastructure - New luxury hotel developments required to suit market needs - Marketing and awareness in Asia currently poor. Improved marketing of Mali required in Asia – trade fairs, tour operator educationals, etc.	- Limited quality of services and infrastructure – hotels, transport, etc. - Punctuality lacking – easy going here, not sure if this will suit Asian travelers - Language challenges – but they are a bilingual country – English and French	- Language and interpretation - Group travel difficult in most parts of Zambia – size of buses and accommodation not suitable - Poor and tedious air access from Asian markets - Road conditions difficult - Lack of understanding of Asian culture and market requirements - Quality of service suspect - Lack of market knowledge and access to operators

3 How effective would you rate the **marketing** of your country and region as a tourism destination?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus that it is poor. - Differentiating Uganda from regional instability requires a huge effort - Marketing budget and human capacity very limited - Private sector view is Government does not understand the value of tourism, although it is slowly changing - Limited accommodation and other capacity makes difficult to attract large groups - Internet marketing is poor - Limited marketing tools and presence at international events	- General consensus that it is poor to fair. - Acknowledgement of marketing efforts of other countries e.g. Kenya, Tanzania - Concentrating only on a few trade fairs - Working on finalizing brand – tourism as a sub- brand within nation brand - Marketing budget limited - PR in USA but often by default rather than design	- General consensus is poor to average - Much has been done by the government but need more private sector (travel agencies) investment for innovation and promotion via the Competitiveness Fund	- General consensus is fair, with substantial scope for improvement - Government supportive within means at disposal	- Fair, in view of very limited financial resources	- General consensus is poor. - Budget extremely limited - Threat of Zimbabwe regaining competitive edge - Government leadership lacking - Lack of market understanding and innovation - Lack of cohesive branding

4 (i) What would you consider as the best **option for future tourism growth** in your country and region:

(ii) What are the main reasons for your view?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus that they should aim for a mixture of upper end and medium end travelers and increase not only value but also volume - Their commercial products are largely at the budget to medium end, so have to build and industry and elevate value - Strong view from Wildlife Authority that fragile ecosystems should be protected at all cost and that a high value/low volume approach will be appropriate in conservation areas and fragile resources such as gorilla viewing, Rwenzoris, fresh water lakes, etc. Higher volume can be sought outside National Parks	- General consensus in favor of low volume-high value approach - Concern that low spend tourists (e.g. private overlanders) will impact negatively on resources with limited value - Currently gorilla viewing matches this positioning but other areas not. - This option will require improvement in standards, quality and value for money - Experiences need to be diversified – primates as flagship but need more high quality experiences	- General consensus is for a mixture of high-value –low volume and higher volume-lower value - Government policy rests on 2 pillars: improved return on investment and sustainability of tourism - A good balance is required to achieve both of these aims - They have high quality beach tourism facilities but want to improve the returns by promoting higher quality tourism and moving away from the mass tourism image	- General preference to focus on low volume, high value tourism - Mali tourism policy is against mass tourism – cultural sensitivity important - However, recognition that tourism is still in its infancy and there should be scope for volume growth in non-luxury segments – major tour operator was in favor of a mixed low volume/high value and higher volume/lower value approach	- Regard low cost and high volume as suitable, since their facilities are very basic and need to focus on budget explorer	- General consensus is for a mixture of high-value –low volume and higher volume-lower value. - Due to diversity of resources and landscapes can accommodate both - Environmental integrity important but only if economically sustainable

5 How would you rate the **service quality** in the tourism sector?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus is poor to average, however slowly improving - Islands of excellence as major hotel chains enter the country	- General consensus is poor. - President in support of Need for national customer services campaign similar to anti-litter campaign	- Rated as fair to excellent	- Rated as fair, with service gaps in some hotels	- Rated as fair, room for improvement but inherent hospitality	- General consensus is poor to average - Pockets of excellence in mainstream industry - Peripheral services e.g. banking and transport, poor - No tipping policy to incentivize good service

6 How would you rate the **skills levels** of the average available worker in the tourism sector?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus is poor. - Major areas for improvement: service skills in hotels and restaurants, overall customer care and interaction and tour guiding.	- General consensus is poor. - No heritage of tourism and lack of training - workers out of context - Language and communication challenges - Service industry – serving has low status – can cause embarrassment - Low pay – no tipping culture, rather service charges, no incentives	- Rated as fair to excellent - The public and private sectors have joined forces to improve service levels and skills	- Skills levels are poor to fair - However, major skills gaps in the hotel sector with limited skills pool	- Rated as fair	- Poor skills pool - Limited service culture and skills

7 (i) How would you rate the quality of skills **training programmes** for tourism workers?

(ii) What are the main reasons for your view?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus is programmes are poor quality - While Uganda has a National Hospitality Training Institute quality is suspect and the school needs a lot of support to improve equipment, staff knowledge and curriculum quality. - Too much focus on theoretical training, not hands- on - The industry is in dire need of more trained staff - Not only skills building, but also change of attitude; more focus on entrepreneurship	- General consensus is programs are poor quality, efforts to improve - Current small tourism training facility but quality needs improvement - More need for practical, hands- on training - Tourism needs to be part of national school's curriculum	- Excellent training facilities - Advanced training programs are available for all specialties in tourism - Currently expanding the hospitality training network to ensure continuous training in the industry	- No proper training facilities - There is a major need for a quality hospitality training college, nothing available in Mali. - The government and development cooperation agencies conduct ad hoc training and are supportive of skills development	- Fair, they have a regional college for hospitality and travel qualifications - Are introducing tourism courses in secondary schools	- Hospitality and Tourism Training Institute (HTTI) with capacity of 400 students p.a. - HTTI quality of training poor. Outdated curricula, equipment with major gap in industry needs vs. actual training. - School needs upgrading and training of lecturers; more hands-on and practical training - Plans afoot for a hotel school in Livingstone, but been on the cards long - Need for entrepreneurial and business training and attitude

8 (i) How would you rate the quality of **tourism infrastructure** (airports, transportation, water, etc.)

(ii) What would you consider the **most pressing infrastructure requirements** and improvements to grow tourism?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Infrastructure poor to fair - Air connections poor and expensive – both to the country and internally - Roads fair and improving, but transport to some key tourism areas poor and e.g. ferries - Electricity grid does not cover many tourism areas - Limited high quality accommodation in tourism areas - Cost of safari vehicles was a challenge but new tax incentives have been introduced - Proper planning is vital - IT and e-tourism lacking in many areas	- Direct air access limited - Roads generally good – some small patches need improvement - Airport efficient but small – expansion being investigated - Other services such as health, money transfer, water, electricity generally good - Required infrastructures are: - Facilities in parks: roads, interpretation centres, lodges, canopy walks, etc. - Diversified experiences e.g. cultural centres, etc. - Conference facilities - Improved air links - Accommodation in key tourism areas - Boats and ferries	- Infrastructure is fair to excellent - Could improve tourism services for independent travelers in and around the airport - Tourist information, signage and overall assistance (e.g. health assistance in rural areas) could be improved especially for independent travelers - Lack of convention centres and conference facilities should be improved	- Infrastructure is poor to fair. - High cost and poor frequency of flights - Need for more hotels - Major public infrastructure needs to improve access to attractions are: • improvement of the airport • Road improvement • Train system • River transport - Telecommunications and health infrastructure requires improvement	- Poor to fair - International air links good with 2 international airports, but internal flights are poor - Railway and water transport poor - Need more quality hotels - Roads and public transport (including buses) need improvement to ensure access to tourism attractions	- Poor to fair rating - Limited and expensive air access to and within country - Roads to main tourist attractions need urgent upgrading – many areas require 4x4 - Limited road network in parks - Airports need upgrading to international level standards - As a result operating costs are high and price competitiveness low

(iii) Are there any **factors that inhibit the movement of tourists** and businesspeople into the country and region? Please mention the most important ones.

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Easy and friendly emigration procedures for Uganda, visa on arrival - Visas expensive for multiple country visits - working on East Africa tourist visa	- Efficient and friendly emigration services, online visa application - In favor of uni-visa for East Africa	- Limited direct flight connections - Visa requirements for many countries	- Generally good - Safety issues in North of country - Limited flight connections to and within country	- Visas easy to obtain, - visa on arrival needs to be arranged prior to visiting - Strict security controls in country to ensure safety	- Difficult and bureaucratic to obtain visa - Emigration systems, speed and welcome need improvement

9 How do you rate the **government's policies and leadership** in the tourism sector?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- General consensus that it is fair – a lot more can be done - Improvement of marketing budget - Quality systems for operators - Better incentives	- Fair to excellent - Government has embraced tourism - Need to strengthen private sector	- Rated as excellent, can always improve but government is fully supportive of the industry	- Private sector feels it is fair - Government has improved awareness of and commitment tourism and increasingly realizing the value of the sector - Still major scope for improved government support	- Poor - Head of state acknowledges tourism but not other Ministries e.g. Finance - They do not understand the value of tourism; tourism budget is very low, - Look at tourism as a luxury, not as economic generator	- General rating is poor - Much talk but limited practical support from government - Government leadership is lacking, major cry for leadership - Stakeholder coordination poor - Major need for proper planning and execution

10 Are you aware of any **incentives or support schemes** from the government to encourage investment in tourism, in particular for **foreign tour operators**? Please highlight such incentives

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- New tax exemption on import of touring vehicles - Tax rebates on hotel buildings - General BUDS scheme through Private Sector Foundation – cash back - Need incentives to encourage training	- General tax rebates and exemptions for tourism developments and equipment but entry amounts are high +$100,000 - Gorilla permits – for every 10 bought 1 free - Companies at trade shows have free space on Rwanda stand - Duty free vehicle and boat imports - General view is they would prefer tourism declared a preferential export sector, qualify for export incentives - Concessions in parks assessed on case-by-case basis	- Competitiveness and innovation fund to support foreign investment and enterprise competitiveness through continuous learning and improvement - Various incentives for land purchase and tenure - Training support programs and incentives - Import and investment provisions for foreign companies	- Tourism included in various national incentive schemes aimed at reduction of poverty (CSLP and CSCRP) - Tourism investments (tour operators, travel agencies, restaurants & hotels) are tax exempt for 5-10 years - World Bank private sector support scheme (FIAS)	- Nothing as yet - They are flirting with idea of special tourism investment code	- Tourism incentives limited - Lobbying to get tourism declared as non-traditional export sector with major tax benefits - Citizen Empowerment Commission (CEC) – benefits for local entrepreneurs but bureaucratic and difficult to access - Zero VAT rating for Livingstone only, but expiring soon

11 Focusing on the specific area(s) where you operate (if applicable)

(a) What would you consider the **most important obstacles/constraints hampering tourism growth** in your country and region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Regional image of conflict impacts on Uganda - Marketing budget miniscule and professionalism lacking - Limited and expensive air access a major drawback - Need for clear planning and direction in sector – e.g. extent of development in protected areas and parks - Improvement of road infrastructure - Improvement of standards and quality of accommodation - Need for skills improvement and good hospitality training facilities - Encourage private investment through clear development frameworks and incentives	- Image of Rwanda and region – need for more and improved marketing budget - Limited and expensive air access – need to be reduced - Limited service and welcoming culture - Limited tourism and hospitality skills pool - Lack of excellent marketing materials - Tour operator relations limited – need bigger operators on board - Limited product diversity – need to create more experiences -	- The current economic crisis and high indebtedness of the sector - Promotion and marketing lacking - Air and sea connections require improvement	- Limited and expensive airline access - Lack of quality training facilities in both private and public sectors - Lack of community awareness and sensitization of value and responsibilities associated with tourism growth - Limited political support for tourism - Seasonality - Visa difficulties - Safety threats and perceptions in North and instability in neighboring countries	- Major challenge is to raise the profile and understanding of tourism in government - Other issues will follow	- Limited access to financing for local private investors – credit lines expensive and difficult - Low brand awareness and very limited marketing - Lack of a long- term plan with spatial allocation and funding to back - Infrastructure gaps – roads, airport - Limited and expensive air access – internal and incoming - Service quality and skills need improvement - Medical facilities limited

(b) What would you consider the **most important opportunities for tourism growth** in your country and region?

Uganda	Rwanda	Tunisia	Mali	Cameroon	Zambia
- Changing perceptions: Uganda is peaceful with abundance of experiences and resources - Uganda tourism to be promoted at highest level e.g. in Presidential speeches etc. - Development of human capital and cultural resources - Finding a balance between minerals exploitation (e.g. in Rift Valley) and sustainable tourism - Good opportunities for private investment – especially in parks; current investment public-private partnerships being sought in national parks - Establishing Uganda as a hub for the region – central location	- Connecting various country experiences in East Africa in single package – requires improved airline access - Rwanda is fresh brand at beginning of life cycle - Political goodwill - Emerging private sector - Society open to change and progress - Small country offering a concentrated, time efficient experience - Stability and peace - Potential for regional links and integration with other countries - Good policies in respect of wildlife management and land reform	- Diversification of tourism products as described - Expanding the tourism season through greater focus on cultural, archeological and rural experiences requiring small- scale investments - Improved tourism capacity at local government level - Improvement of non-hotel attractions and experiences	- Regional potential for multi-destination tours and circuits - Big potential in Pays Dogon and in West Mali en route to Senegal - Development of river tourism (Niger, Senegal) - Ecotourism development in transfrontier parks - Government is willing to support tourism - With political stability and infrastructure improvement tourism has major potential	- Major nature and culture endowments – huge potential for growth	- Maximizing opportunities regarding 2010 World Cup (this is not being done and industry fears a major opportunity will be lost) - Development of entrepreneurial culture among local youth important - Domestic market should be given access to tourism resources

Annex B: Examples of tour packages being sold in various key markets[11]

	USA	GERMANY	UK	NETHERLANDS
NORTH AFRICA				
Family	• Red Sea Resorts • Oasis at Siwa	• Family resorts and tours Morocco, Tunisia	• Egypt: Red Sea Resorts • Tunisia	• Egypt (camel & beach) • Morocco (sleeping in Berber tent/ camel)
Luxury	• Nile cruise (11 nights) • Red Sea Resorts • Oasis at Siwa	• Egypt cross flights (small groups) • Morocco luxury tour (15 days)	• Libya (4-11 nights luxury tour) • Morocco, Tunisia luxury beach resorts	
Tours: packages or tailor-made	• Egypt all-round trips (Nile, Red Sea to Sinai, Cairo)	• Egypt, Morocco various cultural round trips of key sites and cities	• Egypt: Affordable high quality holidays – Cairo to Lake Nasser, Sinai to Red Sea. • Tunisia : Beach and inland combination	• Libya groups: Jewels of the desert • Morocco: Tour by rental car through Morocco. • Comfort in Sahara-4x4 • Egypt: all-round trips
Special Interest	• Desert safaris • Mountain climbing • Horseback riding • 4X4	• Study tour: World heritage site, stone age. • Adventure: desert trips	• Archaeology Tours of ancient Egypt • Algeria & Tunisia tailor-made / small groups historical tours	
Trekking/walking safaris	• Egypt: Desert safaris		• Camel trekking in Sahara	• Morocco: Trekking in Toubkal • Algeria: Camel trekking
Cultural	• Egypt: Art and artifacts • Morocco: cuisine, art, markets	• Morocco: Fés, Tangier, • Morocco/Tunisia lifestyle, traditions	• Egypt: Egyptian history and art	
Adventure	• Sleep in Berber tent, camel trekking			• Morocco: 4x4, dunes, mountain

[11] Information was obtained from a sample of key tour operator websites: USA – Sanctuary Retreats www.sanctuaryretreats.com, Ker & Downey www.kerdowney.com; Germany – Gebeco www.gebeco.de, Windrose International www.windrose.de, African World Resisen www.my-africanworld.de ; UK – Thomson Tours www.thomson.co.uk, Rainbow Tours www.rainbowtours.co.uk, Voyages Jules Verne www.vjv.co.uk, Somak Holidays www.somak.co.uk; Netherlands – Untamed Wildlife Safaris www.untamedwildlife.com; Baobab Reizen www.baobab.nl

	USA	GERMANY	UK	NETHERLANDS
EAST AFRICA				
Family		• Family beach and tours: Malawi, Kenya	• Kenya family adventures • Tanzania safari & beach • Madagascar classic camping	• Uganda: life on typical farm • Kenya: Tracking • Malawi: nature lovers
Luxury	• Camps and Lodges: Uganda, Kenya, Tanzania - lodges and luxury tents with private game drives • Tanzania 8 & 15-night safaris • Uganda 9-days safari	• Explore East Africa Tours (14 days) • Luxury tented lodges with private game drives - Kenya, Zanzibar, Tanzania, • Island retreats: Mauritius	• Luxury Island retreats: Seychelles, Mauritius	• Kenya: Exclusive ultimate safari. • Fly-in safaris to Tanzania, Uganda
Tours: packages or tailor-made	• Different tour packages to Uganda, Tanzania, Kenya • Seychelles: tailor –made.	• Variety of price options • Madagascar (3-4*) • Malawi: 2 weeks mountain/ lakes/ culture/walking • Tanzania: Nat parks/ Serengeti • Malawi: Tented tour	• Variety of price from expensive – low cost options for independent traveler: (fully guided tours): Ethiopia, Kenya, Tanzania, Zanzibar, Rwanda • Islands: Reunion	• Ethiopia (15-25 day) • Kenya / Tanzania hotel and camp 2* • Madagascar 4* • Malawi: Self-drive • Tanzania Rainforest and beach (3*)
Special Interest	• Tanzania: 10-night photographic safari; Dhow trips; Chimpanzee trekking; Snorkeling / fishing • Uganda: Gorilla trekking, boating safari, Bird watching		• Kenya, Tanzania: Game migration • Birding: Uganda, Rwanda	

	USA	GERMANY	UK	NETHERLANDS
EAST AFRICA (cont.)				
Trekking/ walking safaris	• Uganda: Gorilla trekking	• Malawi mountain	• Kilimanjaro	• Ethiopia (culture walks) • Kenya (climb mount. Kenya) • Uganda (Rwenzori) • Tanzania (Kilimanjaro)
Cultural	• Tanzania: Zanzibar		• Ethiopia: 12 nights cultural exploration • Zanzibar: Stone Town • Malawi rural culture	• Ethiopia: Festivals
Wildlife safaris	• Tanzania: Great migration • Gorilla & Chimp trekking	• Uganda: Gorillas • Serengeti: Wild cats • Rwanda: Brief 4-day Gorillas in Rwanda • Tanzania: Wildebeest migration. • Guided Safari/tents: Magic of Eastern Africa. (14 days in Tanzania, Rwanda & Uganda (gorilla/chimps/ migration)	• Tanzania-Serengeti: • (8 nights) • Kenya: Migration • (5-8 nights)	• Kenya (4*) groups • Uganda: Gorillas in the Mist • Tanzania • Malawi: Wildlife and lakes (11 nights)
Adventure	• Uganda: Boating safari • Tanzania: snorkeling/diving	• Off-road tours: Tanzania, Mozambique • Malawi	• Overland Adventures - long basic tours all over East Africa e.g. Lakes & Apes= 38 days Kenya, Uganda, Rwanda, Malawi, • Tanzania: Kilimanjaro	• Tanzania: Mountain climbing

	USA	GERMANY	UK	NETHERLANDS
SOUTHERN AFRICA				
Family			• South Africa: beaches & safari. • Eco tourism in SA • Botswana: young explorers in Africa	• Botswana: Boat on Okavango Delta, game drives, walking safaris. • Namibia: Etosha climbing dunes. • South Africa: safari & beach.
Luxury	• Camps and Lodges: (luxurious lodges and tents / game drives) Botswana, Zambia, Namibia, • South Africa exquisite wineland tours • Zimbabwe: helicopter views of Vic falls	• Small groups Unique cross flights: • Botswana • Namibia • Zambia • South Africa • Rovos Rail: Cairo to Cape	• Namibia: luxury camping safaris • Mozambique: Resorts (Indigo Bay) • Madagascar: 5* Hotel • South Africa: Hotels & guided tours • & private game lodges.	• Trains: Blue train, Rovos Rail • Fly-in safaris: Botswana • Mozambique, Zambia, SA
Tours: packages & tailor made	• Mauritius: tailor- made • Romantic getaways • Botswana: Customized journeys and safaris	• Madagascar (3-4*) packaged tours • Swaziland/SA roundtrip • Namibia: Standard, guided and independent self- drive. • South Africa: Independent touring/ self-drive and escorted • Mozambique: Safari & Ocean • Zambia: Vic falls & National Parks • Indian Ocean Big 5: • SA: 14 days small group in game reserves and coast.	• Variety of price options for the independent traveler: • Botswana, Namibia (16 nights), SA, Mauritius, Madagascar, Zambia • Namibia: Camping safari	• Beach cottages: Seychelles, Maldives • Variety price options: hotel, camp, 2-3*: • Mozambique, Zambia • South Africa

	USA	GERMANY	UK	NETHERLANDS
SOUTHERN AFRICA (cont.)				
Special Interest	• Star gazing • Photographic excursions • Spa and wellness	• South Africa: Wine and dance	• Bird watching: SA • Marine life, diving, whale watching: Mozambique, SA • Desert horse trails: Namibia	• Travel Fair & Work: • SA/Swaziland, Mozambique, Zambia
Trekking/ walking safaris		• Zambia: Hyena Trail (18 days)	• Zambia: Walking safari (8 days) • South Africa: 4 days walking safari game park	• Namibia (Fish river) • Zambia walking safaris • SA (Kruger National Park)
Culture		• South Africa: rainbow nation: Cape Town, Durban, townships, etc.	• Township tours: SA • Madagascar: City tours of Antananarivo	
Wildlife safaris	• Botswana: 4x4 game drives • Walking safaris • Namibia: Game drives in desert adapted 4x4's	• Southern Africa: Jewels of Africa Tours: Big 5 • Zimbabwe: National parks / game drives especially elephants • Namibia: Small and large group round-trip	• Various safari options: Botswana, Zambia, South Africa	• Various safari options: Botswana, Zambia, South Africa
Adventure	• Namibia: Quadbike safaris, Walking safaris • Zimbabwe, Zambia: Bungee jumping, White river rafting, • Mozambique: snorkeling, diving, wind surfing	• Zambia: Canoe safari on Zambezi. • Seychelles: Sailing cruise between islands. • South Africa: Horseback safari (5 day).	• Vic Falls: Bungee jumping, river rafting. • Botswana & Namibia: Wild about Africa guided trips/ small groups. • Namibia: Elephant back safari	• Namibia: Desert Adventure • Mozambique: Sailing tours
Cultural	• Namibia: Rock engravings • Botswana: San Bushman interaction, archaeological experience	• Mozambique : Isla-Mozambique	• Namibia & Botswana: San-Bushman experiences	• Travel Fair & Work: SA/Swaziland • Faces of Madagascar (culture nature)

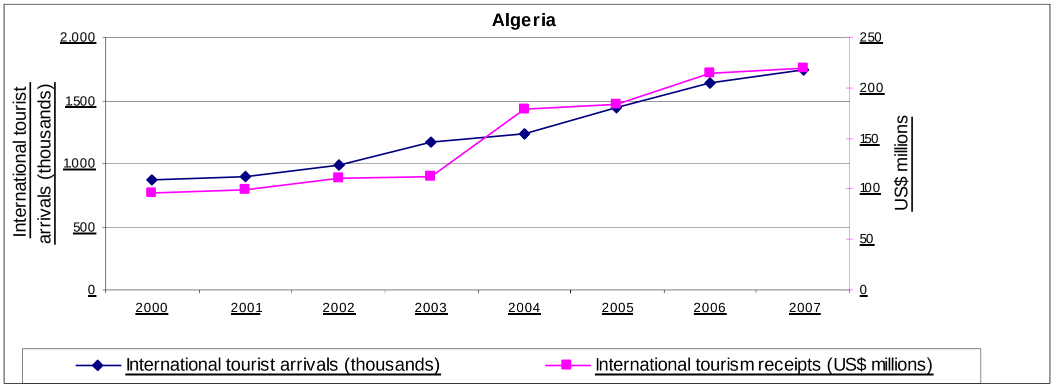
	USA	GERMANY	UK	NETHERLANDS
WEST AFRICA				
Family				• Mali (caravan cities along the Niger) • Senegal: Sleep in desert, star gazing, canoeing, drumming lessons.
Tours: packages & tailor made	• General tourism with accommodation from very basic family homes to luxury 5-star: Mali, Togo, Benin, Ghana, Burkina Faso		• Overland tours, West Africa multi- destination	• Variety price options • Mali: Groups to Timbuktu. Highlights of Mali. • Burkina Faso: Round trips by Jeep
Special interest	• Ghana: Digital photo workshop-14 days • Senegal: Jazz festival	• Ghana: Species-rich bird life (10 days)	• Ghana: birding	• Mali: Camel safaris
Trekking/walking		• Hiking in jungle (see African parrot)		• Various cultural trek options: Burkina Faso, Niger
Cultural	• Ghana: Slave history, castles, historical Accra • Mali: Festival of the desert. • Explore West Africa tours 8-33 days	• Ghana: Cultural Impressions (Ashanti region)		• Mali: Music festival • Mali & Burkina Faso: culture of camel caravans and art

	USA	GERMANY	UK	NETHERLANDS
WEST AFRICA (Cont.)				
Nature	• Ghana: Ghana natural wonders	• Ghana: 8 days Ghana South by road & boat. 3*		• Algeria: Sand dunes
CENTRAL AFRICA				
Wildlife/Nature	• Gabon Eco tours, 13 days	• Tours to Cameroon • (14 days) – Game drive • Sao Tome: Volcanic Island (8 days) • Sao Tome: Nature & eco tours: sea turtle night patrol/ forest.		
Tours: packages & tailormade	• Cameroon	• Gabon: Gorilla tour. • Gabon: Natural paradise 4x4 / beach/ boat trips.		• Cameroon: Group travel – African Markets and Kingdom
Special interest		• Sao Tome: Bird watching & Orchids		
Adventure		• Sao Tome: diving, Kayaking.		
Culture		• Sao Tome: Day tours / dinner with community / coffee plantations / city tour / Arts & dance tour.		•
Trekking/walking		• Sao Tome: Hiking on Principe island		• Trekking: Cameroon

Annex C: Directory of Tourism Organizations and Associations in Africa

1. Algeria

Capital: Algiers	
Surface (sq. Kilometres)	1,001,500
Population (millions), 2007	34.40
Gross domestic product, current prices (USD billions), 2007	131.57
Gross domestic product, constant prices, annual percent change, 2007	4.60
Gross domestic product per capita, current prices, (USD), 2007	3,824.65
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	6,533.37
International tourist arrivals, 2007 (thousands)	1,743.00
International tourism receipts, 2007 (US$ millions)	219.00



Travel Agent Associations

- **F.N.A.T. / Fédération Nationale des Associations des Agences de Tourisme et de Voyages**

Agence Tessala
10 Rue Herzot, Miramar
31000 Oran
Algeria
Tel: (+213) 41393155

- **U.N.A.T.A. / Union Nationale des Associations des Agences de Tourisme et de Voyages Alternatifs**

Place Emir Abdelkader
11000 Tamanrasset
Algeria
Tel: (+213) 29334693
Fax: (+213) 29334232

- **F.A.A.V. / Fédération Algérienne des Agences de Tourisme et de Voyage**

14 Rue Ahmed El-Hachemi
16000 Algiers
Algeria
Tel: (+213) 21657246
Fax: (+213) 21665992

- **U.N.A.T.V. / Union Nationale des Agences de Tourisme et de Voyages**

Agence Chouaki
39 Boulevard Emir Abdelkader
31000 Oran
Algeria
Tel: (+213) 41331119
Fax: (+213) 41392766

- **A.N.A.T. / Association Algérienne des Agences de Tourisme et de Voyages**

Rue Satal Djillali
Mostaganem
Algeria
Tel: (+213) 41264208, 41263582

- **A.R.A.V.E. / Association Régionale des Agences de Voyage de l'Est**

c/o Djamila Voyages
11, Rue Tali Amar El Eulma
19000 Sétif
Algeria
Tel: (+213) 36863596
Fax: (+213) 36862530

- **C.N.I.A.J. / Centre National d'Information et d'Animation de la Jeunesse**

Cité Olympique Bp. 139
Rostomia El Biar
16000 Algiers
Algeria
Tel: (+213) 21921360
Fax: (+213) 21921370

- **Fédération de Plein-Air, Loisirs et Echanges de Jeunes**

101, Bd. Krim Belkacem
16000 Algiers
Algeria
Tel: (+213) 21734318/9

Tour Operator Associations

- **Confédération des Opérateurs de Tourisme (COT)**

Hôtel de l'Aéroport International
Houari Boumediènne Dar El Beida
16000 Algiers
Algeria
Tel: (+213) 21507552, 21506250
Fax: (+213) 21507539

Youth Hostel Associations

- **Youth Hostel Association**

Nedjma
16 Rue Ben Mehidi Larbi
16000 Algiers
Algeria
Tel: (+213) 21737078
Fax: (+213) 21740465

- **FAAJ Fédération Algérienne des Auberges de Jeunesse**

213, Rue Hassibe Ben Bouali
16015 Algiers
Algeria
Tel: (+213) 21670321

Hotel Associations

- **F.N.H.R. / Fédération Nationale de l'Hôtellerie et de la Restauration**

c/o Hotel 'El-Aurassi'
16000 Algiers
Algeria
Tel: (+213) 21748252
Fax: (+213) 21632292

- **U.N.T.H. / Union Nationale du Tourisme et de l'Hôtellerie**

11 Rue Ahmed Chaib
16000 Algiers
Algeria
Tel: (+213) 21633420, 21632611, 21632273

- **AAHOREL / Association Algérienne de l'Hôtellerie, de la Restauration et des Loisirs**

c/o Hotel ADEF
6, Boulevard de l'A.L.N.
31000 Oran
Algeria
Tel: (+213) 41335515

- **A.H.R.W.T. / Association des Hôteliers et Restaurateurs de la Wilaya de Tizi-Ouzou**

c/o Hotel 'Lala Khedidha'
15000 Tizi-Ouzou
Algeria
Tel: (+213) 25202901, 25201693/4
Fax: (+213) 25201692

- **Enterprise de Gestion Touristique de Biskra**

Boîte Postale 28
Star Melouk
07005 Biskra
Algeria
Tel: (+213) 33741742, 33743288, 33749562
Fax: (+213) 33746410
E-Mail: egtbis@wissal.dz
Internet: http://www.sahara-hotels.com

Hotel Reservation Services

- **ONAT / Office National de l'Animation, de la Promotion et de l'Information Touristique**

Boîte Postale 241
25/27, Rue Khelifa Boukhalfa
16000 Algiers
Algeria
Tel: (+213) 21743376/7, 21743303, 21618924
Fax: (+213) 21743214, 21616171
E-Mail: onat@onat-dz.com
Internet: http://www.onat-dz.com

- **Enterprise de Gestion Touristique de l'Ouest EGTO**

04 Rue Motrani Mohamed
Hotel Antar Bechar
31000 Oran
Algeria
Tel: (+213) 49817616
Fax: (+213) 49817162
Internet: http://www.egtouest.com

- **05 Rue du Maghreb 'Grand Hotel', tel 41391597**
Enterprise de Gestion Touristique Centre

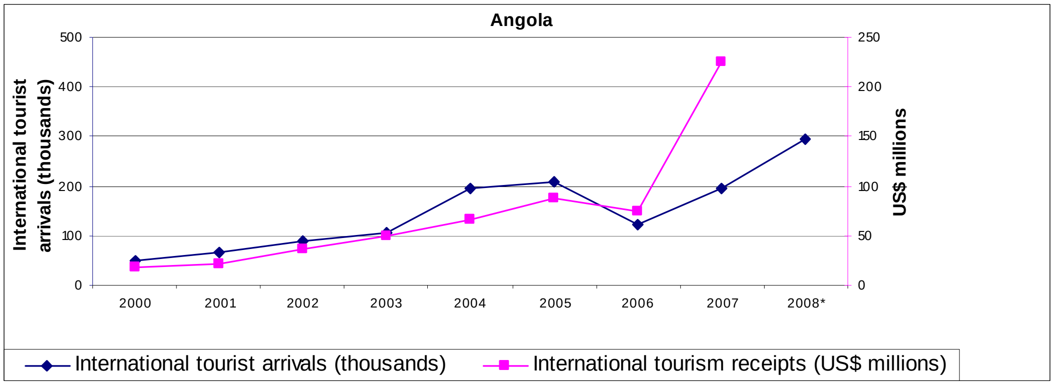
170 Rue Hassiba Ben Bouali
16000 Algiers
Algeria
Tel: (+213) 21670305
Fax: (+213) 21674900

- **Enterprise de Gestion Touristique Est**

59, Rue Aouati Mustapha
25000 Constantine
Algeria
Tel: (+213) 31943033/4
Fax: (+213) 31939589

2. Angola

Capital: Luanda	
Surface (sq. Kilometres)	**1,246,700**
Population (millions), 2007	**16.33**
Gross domestic product, current prices (USD billions), 2007	**61.36**
Gross domestic product, constant prices, annual percent change, 2007	**21.13**
Gross domestic product per capita, current prices, (USD), 2007	**3,757.48**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**5,590.49**
International tourist arrivals, 2007 (thousands)	**194.73**
International tourism receipts, 2007 (US$ millions)	**225.00**



Hotel Associations

- **ANGHOTEL Empresa de Hotelaria de Angola**

Caixa Postal 2496
Rua da Missão 93 S/L
Luanda
Angola
Tel: (+244-222) 334446, 392698, 392648, 392748, 392848
Fax: (+244-222) 393480

- **HORESIL Associação dos Indústriais de Hotelaria**

Caíc Katadi 15
Luanda
Angola
Tel: (+244-222) 338972
Fax
Internet: http://www.angola-chamber.com/hotels.html

Travel Agent Associations

- **Associação dos Agentes de Viagens e Operadores de Turismo de Angola AAVOTA**

Caixa Postal 3758
Centro de Escritórios Etram
Rua da Missão No. 93, 1°andar Esq. 12
Luanda
Angola
Tel: (+244-222) 372259
Fax: (+244-222) 372259
E-Mail: geral@aavota.com
Internet: http://www.aavota.com

3. Benin

Capital: Porto-Novo / Cotonou	
Surface (sq. Kilometres)	112,620
Population (millions), 2007	7.86
Gross domestic product, current prices (USD billions), 2007	5.43
Gross domestic product, constant prices, annual percent change, 2007	4.24
Gross domestic product per capita, current prices, (USD), 2007	691.58
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,540.53
International tourist arrivals, 2007 (thousands)	186.00
International tourism receipts, 2007 (US$ millions)	118.00

Travel Agent Associations

- **ATOV / Association des Tours Operators et Agences de Voyages du Bénin**

Boîte Postale 01017
Cotonou
Benin
Tel: (+229) 21313327
Fax: (+229) 21315713

- **ANOPRITOB / Association des Opérateurs Privés Touristiques du Bénin**

04 Boîte Postale 0144
Cotonou
Benin
Tel: (+229) 21320015
Fax: (+229) 21341203
E-Mail: anopritob@intnet.bj
E-Mail: vkfhotel@intnet.bj

Hotel Associations

- **Organisation Regionale de l'Association Internationale de l'Hôtellerie**

c/o Hôtel GL
Boîte Postale 1226
Cotonou
Benin
Tel: (+229) 21331617/8
Fax: (+229) 21331617

- **ASECNA**

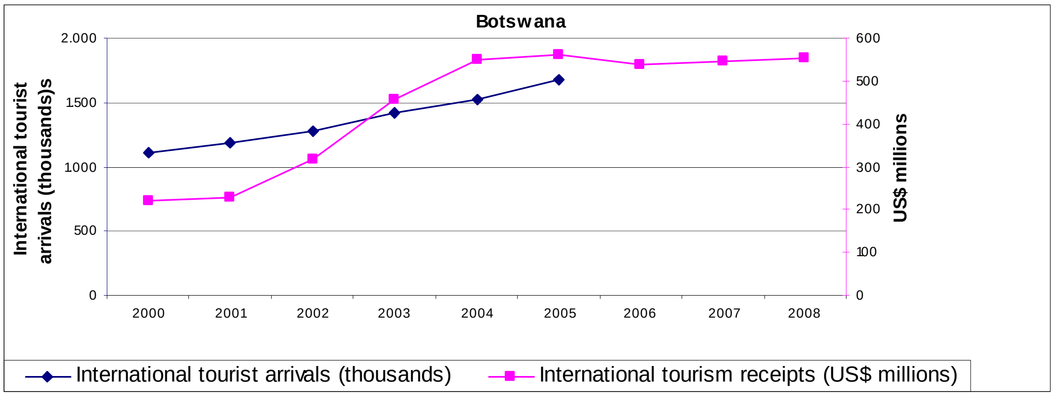
Aéroport Cotonou
Boîte Postale 96
Cotonou
Benin
Tel: (+229) 21300148, 21300292
Fax: (+229) 21300839

- **Conseil National de Hôteliers du Benin (CONAHB)**

Boîte Postale 184
Cotonou
Benin
Tel

4. Botswana

Capital: Gaborone	
Surface (sq. Kilometres)	581,730
Population (millions), 2007	1.56
Gross domestic product, current prices (USD billions), 2007	12.31
Gross domestic product, constant prices, annual percent change, 2007	5.44
Gross domestic product per capita, current prices, (USD), 2007	7,888.43
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	16,449.70
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	546.07



Tourism Associations

- **BOCOBONET Botswana Community-Based Organization Network**

c/o Douglas Lecholo
Private Bag BO 166
Bontleng
Botswana
Tel: (+267) 3185081
Fax
E-Mail: bocobonet@mega.bw

- **HATAB / Hotel and Tourism Association of Botswana**

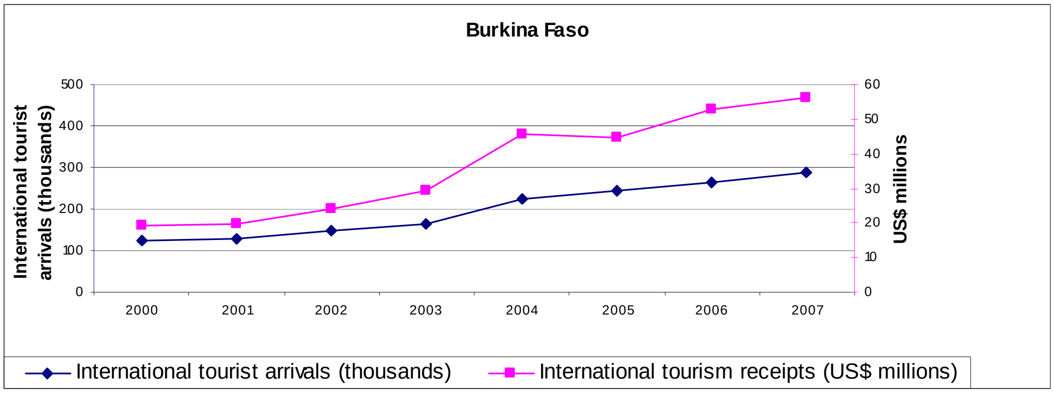
Private Bag 00423 (POB 968)
Gaborone
Botswana
Tel: (+267) 3957144, 3956498
Fax: (+267) 3903201
E-Mail: info@hatab.bw
Internet: http://www.hatab@hatab.bw
Internet: http://www.hatab.bw

Hotel Associations

HATAB / Hotel and Tourism Association of Botswana
Private Bag 00423 (POB 968)
Gaborone
Botswana
Tel: (+267) 3957144, 3956498
Fax: (+267) 3903201
E-Mail: hatab@info.bw
Internet: http://www.hatab.bw

5. Burkina Faso

Capital: Ouagadougou	
Surface (sq. Kilometres)	274,000
Population (millions), 2007	13.73
Gross domestic product, current prices (USD billions), 2007	6.98
Gross domestic product, constant prices, annual percent change, 2007	4.17
Gross domestic product per capita, current prices, (USD), 2007	508.29
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,253.08
International tourist arrivals, 2007 (thousands)	289.00
International tourism receipts, 2007 (US$ millions)	56.06



Hotel Associations

- **[Association des Hoteliers et Restaurateurs de Burkina Faso (AHRB)]**

02 Boîte Postale 5044
Ouagadougou 02
Burkina Faso
Tel: (+226) 50340621
Fax: (+226) 50342941
E-Mail: ahrbf@ahrbf.com
Internet: http://www.ahrbf.com

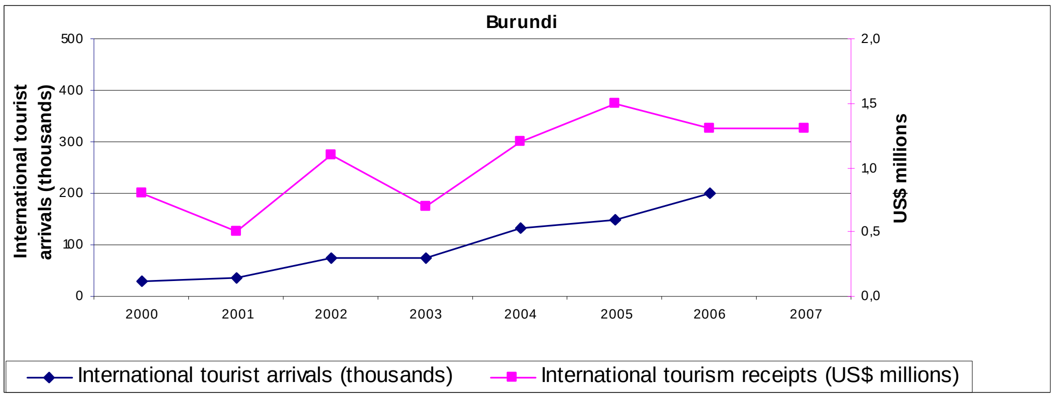
Travel Agent Associations

- **[Société d'Agences de Voyages de Burkina Faso]**

Boîte Postale 1318
Ouagadougou 01
Burkina Faso
Tel: (+226) 50306513, 50306671
Fax: (+226) 50306514

6. Burundi

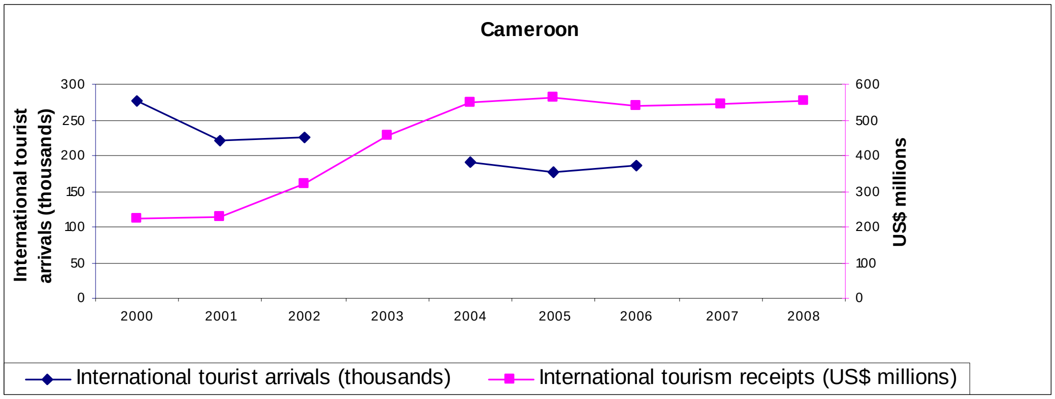
Capital: Bujumbura	
Surface (sq. Kilometres)	27,830
Population (millions), 2007	7.79
Gross domestic product, current prices (USD billions), 2007	1.00
Gross domestic product, constant prices, annual percent change, 2007	3.61
Gross domestic product per capita, current prices, (USD), 2007	128.45
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	371.56
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	1.30



No associations found. Relevant and relatively recent information on the tourism sector in Burundi can be found at the following link:
http://www.bernard-krief.com/espaceinformation/documentation/tourism/Burundi_Country_Profile.pdf

7. Cameroon

Capital: Yaoundé	
Surface (sq. Kilometres)	475,440
Population (millions), 2007	18.86
Gross domestic product, current prices (USD billions), 2007	20.65
Gross domestic product, constant prices, annual percent change, 2007	3.30
Gross domestic product per capita, current prices, (USD), 2007	1,094.99
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	2,087.80
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	177.00



Tourism Associations

- **APTC / Association des Professionnels du Tourisme Camerounais**

c/o M.seme Noungong
Seme New Beach Hotel
Boîte Postale 130
Limbe
Cameroon
Tel: (+237) 33421005
Fax: (+237) 33430939

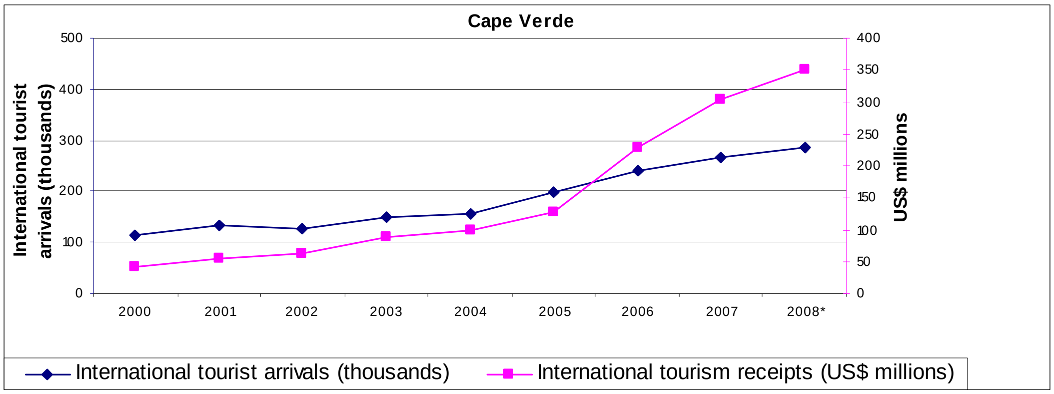
- **Africa Travel Association Cameroon Chapter**

c/o Cameroon Travel Center (CTC)
Boîte Postale 6977
Yaoundé
Cameroon
Tel: (+237) 22226221, 22229758
Fax: (+237) 22226705
E-Mail: cameroon.travel.center@camnet.cm
E-Mail: Camerootravelcenter@camnet.cm
E-Mail: camerootravelcenter@hotmail.com
E-Mail: cameroon_travelcenter@yahoo.fr
Internet: http://www.africa-ata.org

UNWTO Affiliate member
FÉDÉRATION INTER-ETATS DES SYNDICATS DES AGENCES DE VOYAGES ET DE TOURISME DE L'AFRIQUE DE L'OUEST ET DU CENTRE
FIELDS OF ACTIVITIES Professional associations
REGION Africa
COUNTRY Cameroon
Type of Business / Activity: Privé / A but lucratif / Conseil du tourisme / Régional
UNWTO Membership since: 2007
Telephone: 237342 20 62
Fax: 237342 65 20
Email: emmanuel_ngassa@yahoo.fr
Web:

8. Cape Verde

Capital: Praia	
Surface (sq. Kilometres)	4,030
Population (millions), 2007	0.49
Gross domestic product, current prices (USD billions), 2007	1.43
Gross domestic product, constant prices, annual percent change, 2007	6.94
Gross domestic product per capita, current prices, (USD), 2007	2,890.51
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	3,243.79
International tourist arrivals, 2007 (thousands)	267.00
International tourism receipts, 2007 (US$ millions)	302.80



Tour Operator Associations

- **Associação Nacional des Agencias de Viagens de Cabo Verde**

c/o Praiatur Lda.
100 Avenica Amilcar Cabral
Caixa Postal 470
Praia
Cape Verde
Tel: (+238) 2615746, 2615747
Fax: (+238) 2614500
E-Mail: praiatur@cvtelecom.cv

- **UNOTUR União Nacional de Operadores Turísticos de Cabo Verde**

Caixa Postal 97
Ilha do Sal
Cape Verde
Tel: (+238) 2421771
Fax: (+238) 2421744
E-Mail: unotur@cvtelecom.cv
Internet: http://www.unotur-caboverde.com

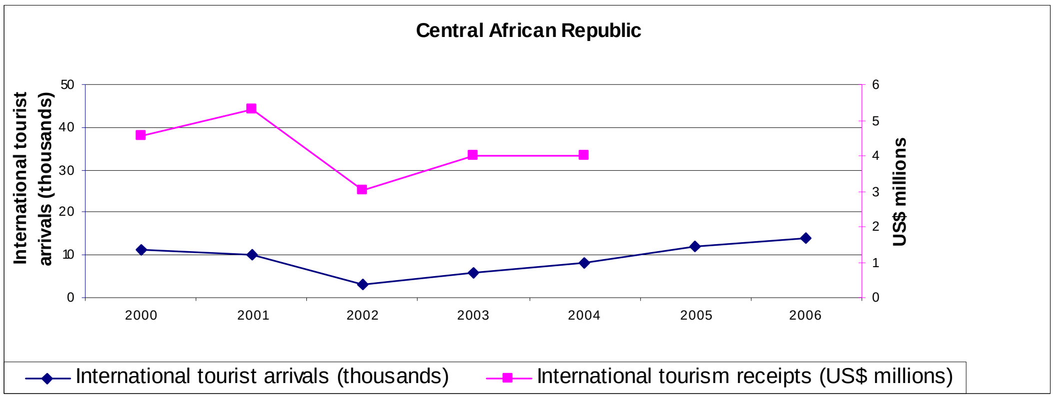
Tourism Associations

- **Sindicato dos Trabalhadores de Comunicação e Turismo**

Praia
Cape Verde
Tel
Fax
E-Mail: stct@cvtelecom.cv

9. Central African Republic

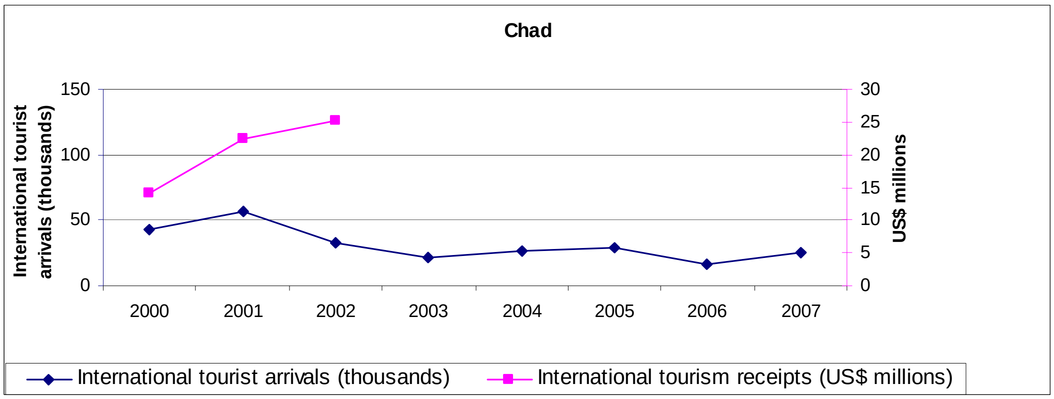
Capital: Bangui	
Surface (sq. Kilometres)	623,000
Population (millions), 2007	4.27
Gross domestic product, current prices (USD billions), 2007	1.71
Gross domestic product, constant prices, annual percent change, 2007	4.20
Gross domestic product per capita, current prices, (USD), 2007	401.51
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	725.82
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	



No associations found.

10. Chad

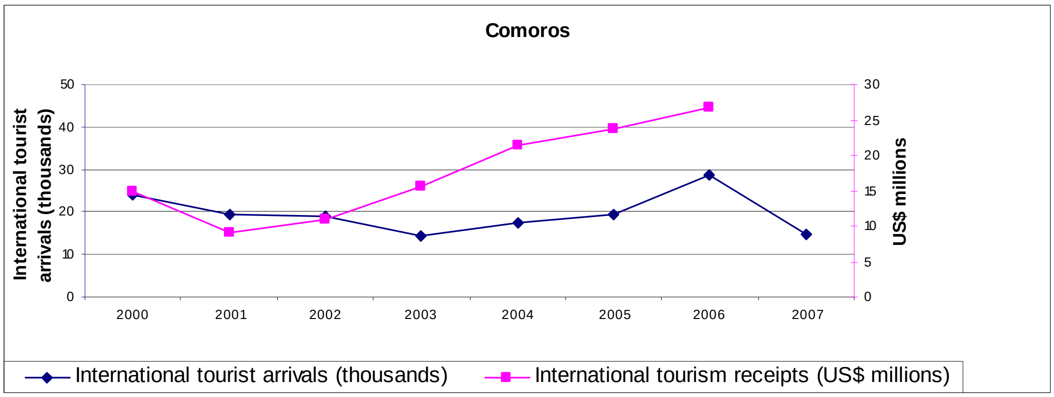
Capital: N'djamena	
Surface (sq. Kilometres)	**1,284,000**
Population (millions), 2007	**9.49**
Gross domestic product, current prices (USD billions), 2007	**7.10**
Gross domestic product, constant prices, annual percent change, 2007	**0.65**
Gross domestic product per capita, current prices, (USD), 2007	**747.44**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**1,675.12**
International tourist arrivals, 2007 (thousands)	**25.00**
International tourism receipts, 2007 (US$ millions)	



No associations found.

11. Comoros

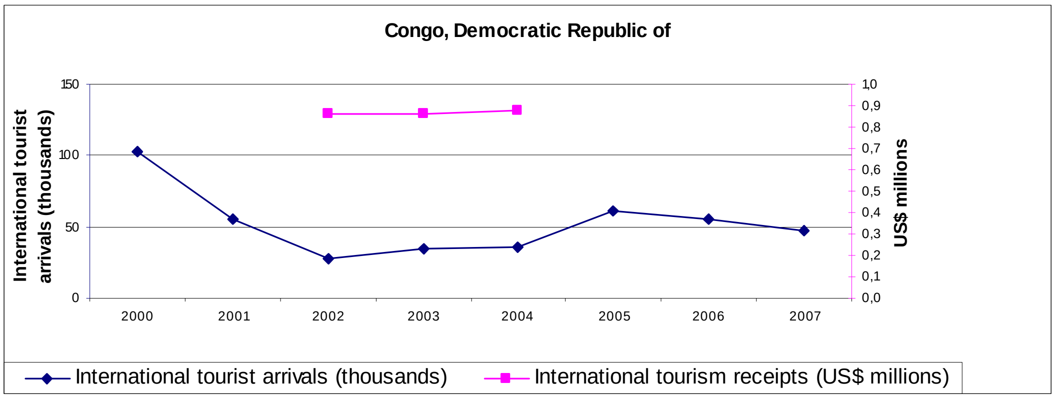
Capital: Moroni	
Surface (sq. Kilometres)	1,861
Population (millions), 2007	0.64
Gross domestic product, current prices (USD billions), 2007	0.44
Gross domestic product, constant prices, annual percent change, 2007	-1.00
Gross domestic product per capita, current prices, (USD), 2007	691.38
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,125.07
International tourist arrivals, 2007 (thousands)	14.60
International tourism receipts, 2007 (US$ millions)	



No associations found.
Relevant and relatively recent information on the tourism sector in Comoros can be found at the following link:
http://www.bernard-krief.com/espaceinformation/documentation/tourism/Comoros_Country_Profile.pdf

12. Congo, Democratic Republic of

Capital: Kinshasa	
Surface (sq. Kilometres)	2,344,860
Population (millions), 2007	61.05
Gross domestic product, current prices (USD billions), 2007	10.14
Gross domestic product, constant prices, annual percent change, 2007	6.26
Gross domestic product per capita, current prices, (USD), 2007	166.15
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	308.65
International tourist arrivals, 2007 (thousands)	47.00
International tourism receipts, 2007 (US$ millions)	



Tourism Associations

- **Association pour la Promotion du Tourisme a Kinshasa**

Rue G. Nzabi 17
Kinshasa
Democratic Republic of Congo
Tel: (+243) 815163685
Fax
E-Mail: manionio@hotmail.com

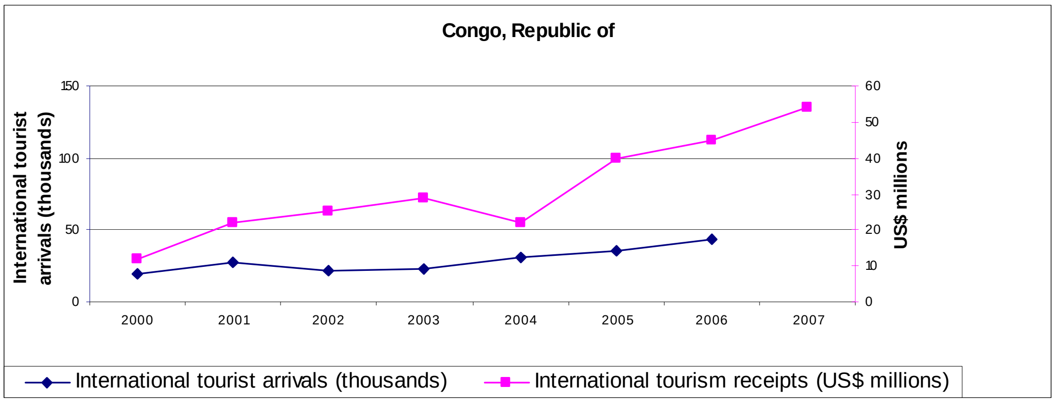
Hotel Associations

- **Comité Professionnel de l'Hôtellerie du Congo**

Boîte Postale 8697
Kinshasa 1
Democratic Republic of Congo
Tel: (+243-12) 28807, 27785

13. Congo, Republic of

Capital: Brazzaville	
Surface (sq. Kilometres)	**342,000**
Population (millions), 2007	**3.55**
Gross domestic product, current prices (USD billions), 2007	**7.66**
Gross domestic product, constant prices, annual percent change, 2007	**-1.58**
Gross domestic product per capita, current prices, (USD), 2007	**2,158.64**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**3,729.60**
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	**54.00**



Travel Agent Associations

Syndicat National des Agences de Voyages et de Tourisme du Congo
c/o Harvas Congo Voyages
Boîte Postale 91
Brazzaville
Republic of Congo
Tel: (+242) 831038/9

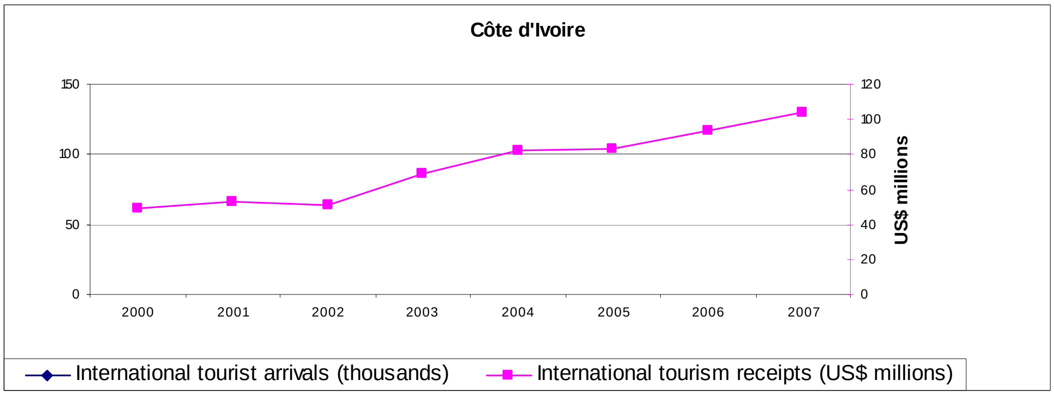
Hotel Associations

- **Fédération de l'Hôtellerie du Congo**

Boîte Postale 1094
Brazzaville
Republic of Congo
Tel: (+242) 832012, 830481
Fax: (+242) 831527

14. Côte d'Ivoire

Capital: Yamoussoukro	
Surface (sq. Kilometres)	322,460
Population (millions), 2007	18.75
Gross domestic product, current prices (USD billions), 2007	19.60
Gross domestic product, constant prices, annual percent change, 2007	1.64
Gross domestic product per capita, current prices, (USD), 2007	1,045.24
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,716.33
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	104.00



Travel Agent Associations

- **Association Nationale des Agences de Voyages**

05 Boîte Postale 163
Abidjan 05
Côte d'Ivoire
Tel: (+225) 20223985/6
Fax: (+225) 20223982

- **Syndicat des Agences de Voyages et de Tourisme**

Boîte Postale 2636
Abidjan
Côte d'Ivoire
Tel: (+225) 20327073

Hotel Associations

- **Fédération des Hôteliers**

Boîte Postale 9229
Abidjan
Côte d'Ivoire
Tel: (+225) 20206500

- **Syndicat National des Travailleurs de l'Hôtellerie de Côte d'Ivoire**

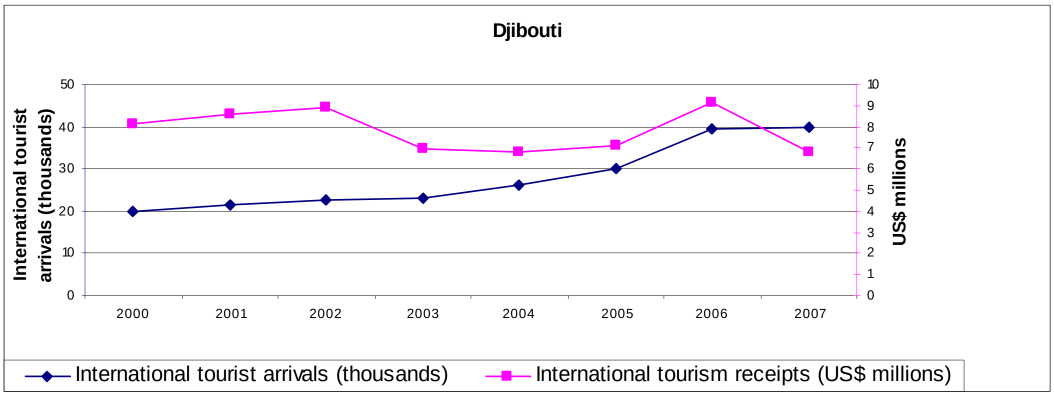
Hotel Ivoire Intercontinental
Boîte Postale 8001
Abidjan
Côte d'Ivoire
Tel: (+225) 22441045, 22442067
Fax: (+225) 22400050

- **Fédération de l'Industrie Hôteliere de Côte d'Ivoire**

01 Boîte Postale 2282 / 1821
Abidjan 01
Côte d'Ivoire
Tel: (+225) 20328043

15. Djibouti

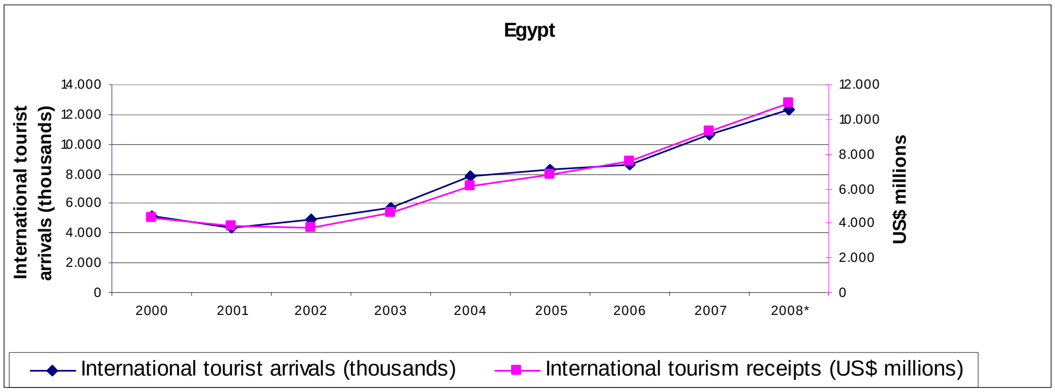
Capital: Djibouti	
Surface (sq. Kilometres)	**23,200**
Population (millions), 2007	**0.77**
Gross domestic product, current prices (USD billions), 2007	**0.84**
Gross domestic product, constant prices, annual percent change, 2007	**5.23**
Gross domestic product per capita, current prices, (USD), 2007	**1,099.35**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**2,270.80**
International tourist arrivals, 2007 (thousands)	**40.00**
International tourism receipts, 2007 (US$ millions)	**7.00**



No associations found.
Relevant and relatively recent information on the tourism sector in Djibouti can be found at the following link:
http://www.bernard-krief.com/espaceinformation/documentation/tourism/Djibouti_Country_Profile.pdf

16. Egypt

Capital: Cairo	
Surface (sq. Kilometres)	1,001,500
Population (millions), 2007	73.57
Gross domestic product, current prices (USD billions), 2007	127.93
Gross domestic product, constant prices, annual percent change, 2007	7.09
Gross domestic product per capita, current prices, (USD), 2007	1,738.81
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	5,490.57
International tourist arrivals, 2007 (thousands)	10,610.00
International tourism receipts, 2007 (US$ millions)	9,303.30



Tourism Associations

- **Egyptian Federation of Tourist Chambers**

8 El Sad El Aly Street
Dokki, Giza
Cairo 11312
Egypt
Tel: (+20-2) 7483313, 7608487
Fax: (+20-2) 7614286
E-Mail: eftc@commnet.com.eg

- **Egyptian Tourism Federation (ETF)**

8, El Sad El Aly Street
Dokki, Giza
Cairo 11312
Egypt
Tel: (+20-2) 7483313, 7608487, 7602743
Fax: (+20-2) 7614286, 7614285
E-Mail: eftc@commnet.com.eg
E-Mail: efta@commnet.com.eg

- **The Association of Egyptian Travel Businesses on the Internet (AETBI)**

Cairo
Egypt
Tel: (+20-2) 3362139
Fax: (+20-2) 3362139
E-Mail: stryjak@touregypt.net
E-Mail: moh.hussein@touregypt.net
Internet: http://touregypt.net/aetbi/

- **Sinai Network**

P.O.Box 1
Nuweiba, South Sinai
Egypt
Tel: (+20-69) 3500339
Fax: (+20-69) 3500339
E-Mail: sinai@sinai4you.com
Internet: http://www.sinai4you.com

Travel Agent Associations

- **Egyptian Travel Agents Association (ETAA)**

8, El Sad El Aly Street
Dokki, Giza
Cairo 11312
Egypt
Tel: (+20-2) 7615228, 3356443, 3380005
Fax: (+20-2) 7616420, 7490223
E-Mail: etaa@etaa.org.eg
Internet: http://www.etaa.org.eg

- **Tourist Friends Association**

33 Qasr El Nil Street
Cairo
Egypt
Tel: (+20-2) 3922036

Hotel Associations

- **Egyptian Hotel Association**

8, El Sad El Aly Street
Dokki, Giza
Cairo 11312
Egypt
Tel: (+20-2) 7488468, 7485083, 3379883
Fax: (+20-2) 7608956, 7613333
E-Mail: eha@link.net

- **Egyptian Chamber of Tourist Commodities**

8 El Sad El Aly Street
Dokki, Giza
Cairo 11312
Egypt
Tel: (+20-2) 7483313, 7608487, 7602743
Fax: (+20-2) 7614286
E-Mail: eftc@commnet.com.eg

- **Sinai Hotels & Diving Clubs**

32 Sabry Abou Allam Street
Cairo
Egypt
Tel: (+20-2) 3930200, 3930301
Fax: (+20-2) 3922228

Youth Hostel Associations

- **Egyptian Youth Hostels**

Abd Al-Hamied-Saied Street 7
Maarouf
Cairo
Egypt
Tel: (+20-2) 5758099
Fax: (+20-2) 5779773

- **Egyptian Youth Hostels Association**

1 El-Ibrahimi Street
Garden City
Cairo
Egypt
Tel

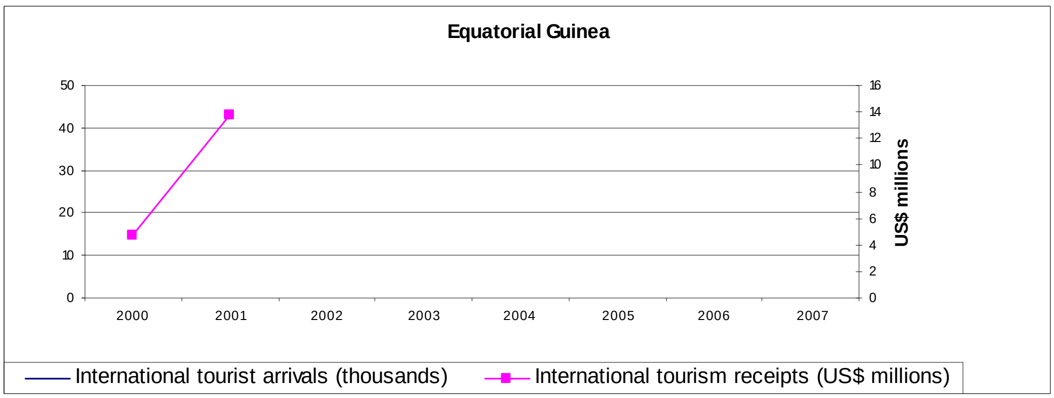
Restaurant Associations

- **Egyptian Chamber of Tourist Establishments**

8 El Sad El Aly Street
Dokki, Giza
Cairo
Egypt
Tel: (+20-2) 7484562, 3352139
Fax: (+20-2) 3376763
E-Mail: cte@link.net.eg

17. Equatorial Guinea

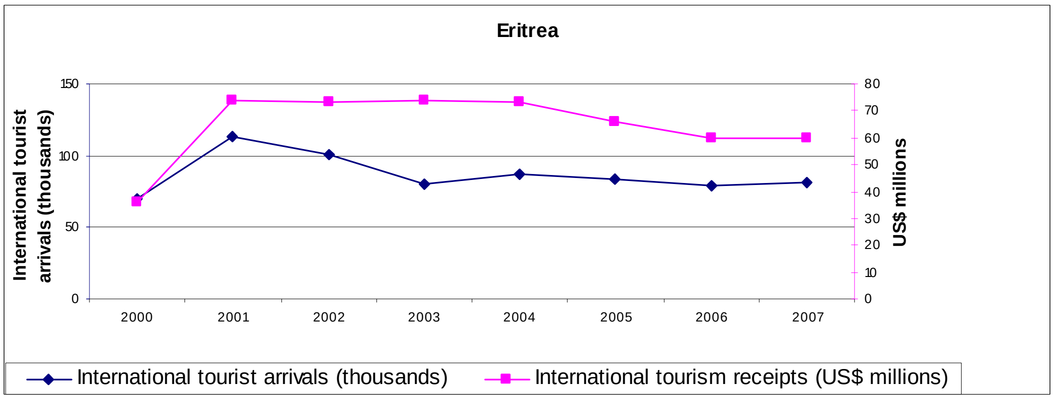
Capital: Malabo	
Surface (sq. Kilometres)	28,050
Population (millions), 2007	1.21
Gross domestic product, current prices (USD billions), 2007	10.49
Gross domestic product, constant prices, annual percent change, 2007	12.44
Gross domestic product per capita, current prices, (USD), 2007	8,701.83
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	12,894.66
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	



No associations found.

18. Eritrea

Capital: Asmara	
Surface (sq. Kilometres)	117,600
Population (millions), 2007	4.68
Gross domestic product, current prices (USD billions), 2007	1.32
Gross domestic product, constant prices, annual percent change, 2007	1.33
Gross domestic product per capita, current prices, (USD), 2007	281.30
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	773.56
International tourist arrivals, 2007 (thousands)	81.00
International tourism receipts, 2007 (US$ millions)	60.00



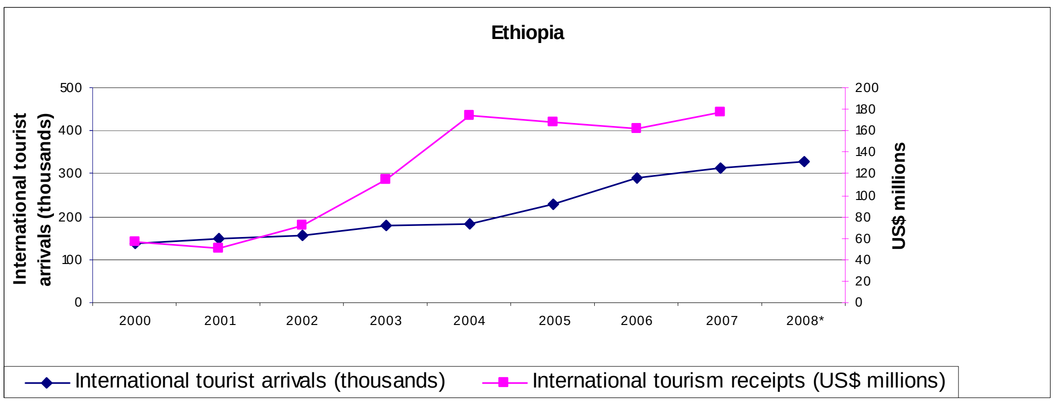
No associations found.

Relevant and relatively recent information on the tourism sector in Eritrea can be found at the following link:

http://www.bernard-krief.com/espaceinformation/documentation/tourism/Eritrea_Country_Profile.pdf

19. Ethiopia

Capital: Addis Ababa	
Surface (sq. Kilometres)	1,104,300
Population (millions), 2007	77.17
Gross domestic product, current prices (USD billions), 2007	19.43
Gross domestic product, constant prices, annual percent change, 2007	11.43
Gross domestic product per capita, current prices, (USD), 2007	251.79
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	805.89
International tourist arrivals, 2007 (thousands)	312.00
International tourism receipts, 2007 (US$ millions)	176.00



Travel Agent Associations

- **Ethiopian Tourist and Travel Agency Association**

P.O.Box 1048
Addis Ababa
Ethiopia
Tel: (+251-11) 5516311
Fax: (+251-11) 5512382

Farm Holiday Information

- **Tourism in Ethiopia for Sustainable Future Alternatives TESFA**

c/o Save the Children UK
P.O.Box 7165
Addis Ababa
Ethiopia
Tel: (+251-11) 1140583, 1233840
Fax
E-Mail: info@community-tourism-ethiopia.com
E-Mail: chapman@ethionet.et
Internet: http://www.community-tourism-ethiopia.com

- At the link (http://www.bernard-krief.com/espaceinformation/documentation/tourism/Ethiopia_Country_Profile.pdf) the following associations are reported:
- **Ethiopian Tour Operators Association**

Tel No. 251-11-5508-444
251-11-5508-445
251-11-5508-446
Fax No. 251-11-5505-670
P.O.Box 27548 code 1000
Email - ethiotour@ethionet.et
web - www.ethtoa.com

- **Ethiopian Tour Operators Association**

Guenet Hotel
P.O. Box 27548 Code 1000
Addis Ababa
Tel: +251 (0) 911 649 176 (Mobile) E-mail: ethiotour@ethionet.et
Website: www.ethtoa.com

- **Ethiopian Hotels & Restaurants Association**

C/o Imperial Hotel Plc
P.O. Box 2966
Addis Ababa
Tel: +251 (0)116 293 329 / 95
E-mail: imperialhotel@ethionet.et
Website: www.imperialhotel-ethiopia.com

- **Ethiopian Wild life Association**

c/o Tel: +251 (0) 911 742 0003
Addis Ababa
E-mail: kahsaygt@hotamil.com

- **Ethiopian Tourism Professionals Association**

P.O. Box 100827
Addis Ababa
Tel: +251 (0) 115 501 416
E-mail: ettpa@yahoo.com / theodros42@yahoo.com

- **Ethiopian Heritage Trust**

Tel: +251-(0)11 5153777
Addis Ababa
E-mail: etht@ethionet.et /getach13@yahoo.com

- **Eco -Tourism Association**

c/o Travel Ethiopia
P.O. Box 9438
Addis Ababa

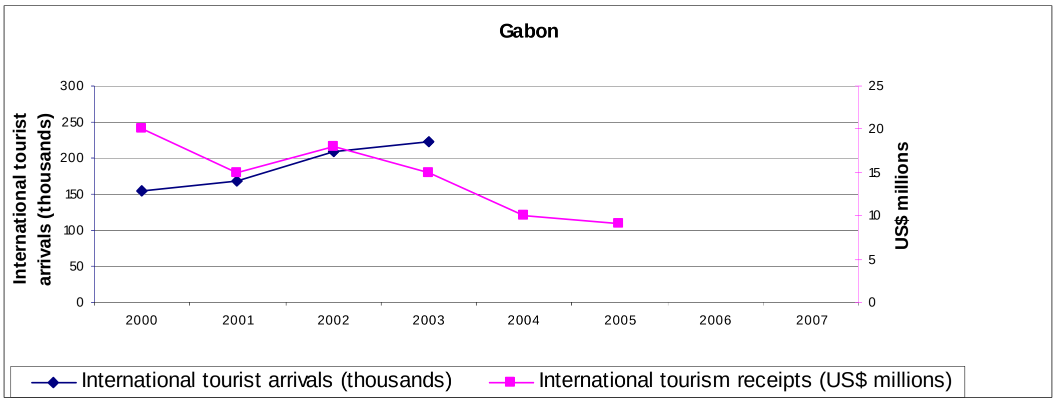
Tel: +251(0)11 5525478
Fax: +251(0)11 5510200
E-mail: travelethiopia@ehionet.et
Website: www.travelethipia.net

- **Ethiopian Travel & Tour Agents Employers Association**

c/o P.O. Box 8449
Addis Ababa
Tel: +251(0) 11 5534200
Fax: +251(0) 5534849

20. Gabon

Capital: Libreville	
Surface (sq. Kilometres)	**267,670**
Population (millions), 2007	**1.43**
Gross domestic product, current prices (USD billions), 2007	**11.30**
Gross domestic product, constant prices, annual percent change, 2007	**5.55**
Gross domestic product per capita, current prices, (USD), 2007	**7,887.49**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**14,083.47**
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	



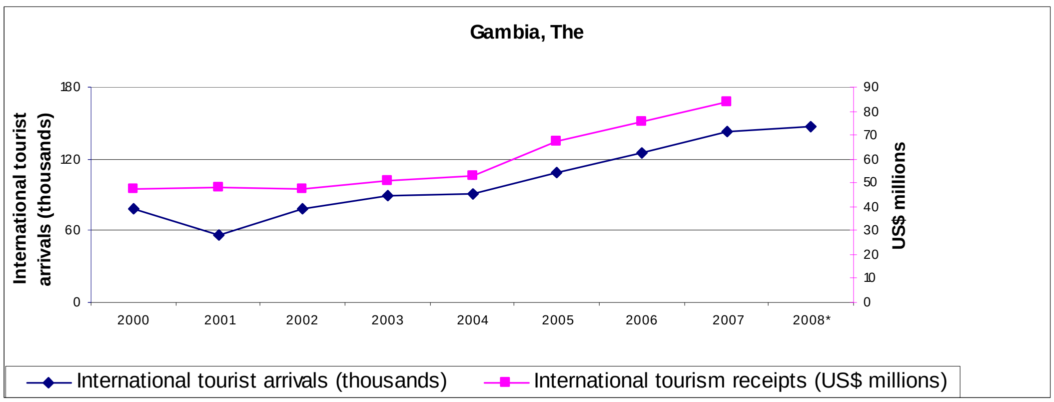
Hotel Associations

- **GABONTOUR**

Boîte Postale 2085
Libreville
Gabon
Tel: (+241) 728504, 723949, 734761
Fax: (+241) 728503
E-Mail: gabontour@internetgabon.com
E-Mail: men@internetgabon.com
Internet: http://www.internetgabon.com/tourisme
(formerly SNTH / Société Nationale de Tourisme et d'Hôtellerie

21. Gambia, The

Capital: Banjul	
Surface (sq. Kilometres)	11,300
Population (millions), 2007	1.59
Gross domestic product, current prices (USD billions), 2007	0.65
Gross domestic product, constant prices, annual percent change, 2007	7.04
Gross domestic product per capita, current prices, (USD), 2007	411.29
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,325.75
International tourist arrivals, 2007 (thousands)	143.00
International tourism receipts, 2007 (US$ millions)	84.00



Tourism Associations

- **The Association of Small Scale Enterprises in Tourism (ASSET)**

P.O.Box 4587
Bakau
Gambia
Tel: (+220) 4462057, 946925
Fax: (+220) 4466180
E-Mail: info@asset-gambia.com
Internet: http://www.asset-gambia.com

Tourist Guide Associations

- **The National Tourist Guides Association**

P.O.Box 1298
Banjul
Gambia
Tel
Fax
E-Mail: officialtouristguides@hotmail.com
Internet: http://www.wftga.org

Hotel Associations

- **The Gambia Hotel Association**

c/o Golden Beach Hotel
Kombo Coastal Road, Bijilo
P.O.Box 2345
Serekunda
Gambia
Tel: (+220) 4465111/2
Fax: (+220) 4463722
E-Mail: info@gambiahotels.gm
Internet: http://www.gambiahotels.gm

- **The Association of Small Scale Enterprises in Tourism (ASSET)**

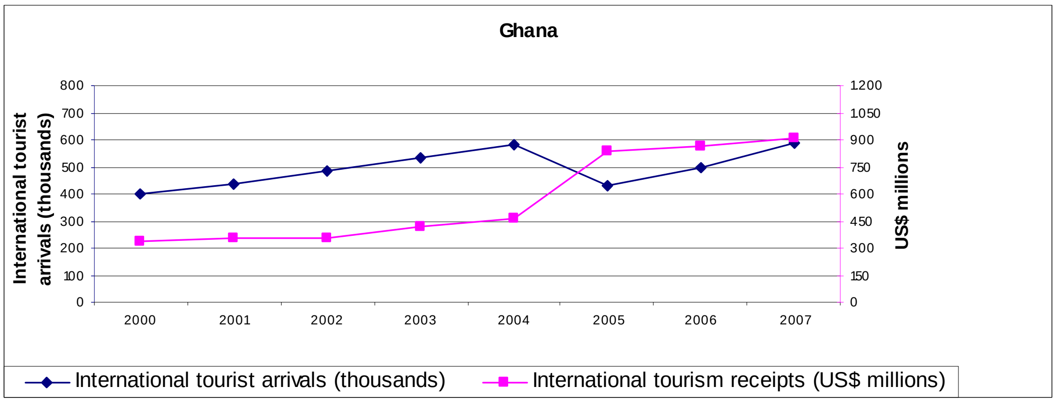
P.O.Box 4587
Bakau
Gambia
Tel: (+220) 4462057, 946925
Fax: (+220) 4466180
E-Mail: info@asset-gambia.com
Internet: http://www.asset-gambia.com

Travel Agent Associations

Tourism and Travel Association of The Gambia
c/o West African Tours Ltd.
P.M.B. 222
Serrekunda
Gambia
Tel: (+220) 4495258, 4495532
Fax: (+220) 4496118
E-Mail: watours@gamtel.gm

22. Ghana

Capital: Accra	
Surface (sq. Kilometres)	238,540
Population (millions), 2007	21.97
Gross domestic product, current prices (USD billions), 2007	14.86
Gross domestic product, constant prices, annual percent change, 2007	6.39
Gross domestic product per capita, current prices, (USD), 2007	676.48
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,426.08
International tourist arrivals, 2007 (thousands)	586.60
International tourism receipts, 2007 (US$ millions)	908.00



Tourism Associations

- **Ghana Tourism Federation GHATOF**

P.O.Box 77
Accra
Ghana
Tel: (+233-21) 231579, 772894
Tel: (+233-20) 8113133 cell.
Fax
Internet: http://www.ghatof.com

- **Car Rentals Association of Ghana**

P.O.Box OS 1176 Osu
Accra
Ghana
Tel: (+233-21) 774580, 774963
Fax: (+233-21) 772894

- **Tour Guides Association of Ghana**

c/o HOTCATT
P.O.Box C 933
Cantonments
Accra
Ghana
Tel: (+233-21) 229113

Travel Agent Associations

- **Ghana Association of Tourist and Travel Agencies (GATTA)**

P.O.Box 7140
Accra-North
Ghana
Tel: (+233-21) 222398
Fax: (+233-21) 231102
E-Mail: info@gattagh.com
Internet: http://www.gattagh.com

5. Youth Hostel Associations

- **YMCA of Ghana**

P.O.Box 738
Accra
Ghana
Tel: (+233-21) 224700
Fax: (+233-21) 226246

- **YWCA of Ghana**

P.O.Box 1504
Accra
Ghana
Tel: (+233-21) 221944, 220567
Fax: (+233-21) 665960

Farm Holiday Information

- **WWOOF Ghana**

Willing Workers on Organic Farms
c/o Ebenezer Nortey-Mensah
P.O.Box TF 154
Trade Fair Centre
Accra
Ghana
Tel: (+233-21) 766825

- **Tourism Development Corporation**

- **Ghana Tourist Development Co. Ltd.**

15 Senchi Road
P.O.Box 8710

Accra
Ghana
Tel: (+233-21) 772084, 776109, 774326, 257244, 257270
Fax: (+233-21) 772093

Tour Operator Associations

- **Tour Operators Union of Ghana**

P.O.Box 30719 K.I.A.
Accra
Ghana
Tel: (+233-21) 254772, 235522
Fax: (+233-21) 254772
E-Mail: info@tougha.com
Internet: http://www.tourgha.com

Hotel Associations

- **Ghana Hoteliers Association**

P.O.Box 5770
Accra-North
Ghana
Tel: (+233-21) 222679

- **Ghana Hotels Association**

P.O.Box 4218
Accra
Ghana
Tel: (+233-21) 249584

Hotel Reservation Services

- **Golden Tulip Ghana**

Liberation Road
P.O.Box 16033
Airport
Accra
Ghana
Tel: (+233-21) 775360
Fax: (+233-21) 775361
E-Mail: reservation@gt-accra.com
Internet: http://www.goldentuliphotels.nl/gtaccra

- **HotelNet - Ghana Tourism Network**

c/o AG Leisure Services
P.O.Box KA 16339
Accra
Ghana
Tel: (+233-21) 764317
Fax: (+233-21) 764318
E-Mail: hotelnet@africaonline.com.gh
E-Mail: leisure@africaonline.com.gh
Internet: http://www.ghanahotels.com

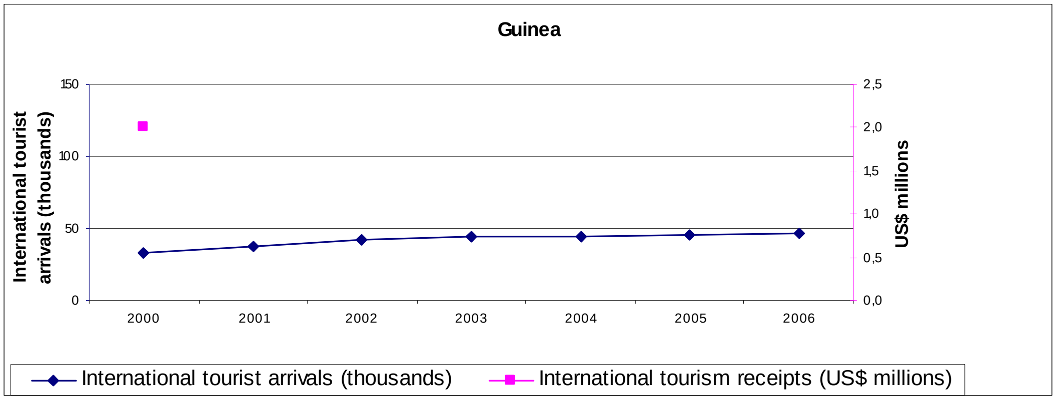
- **State Hotels Corporation**

P.O.Box 7542
Accra
Ghana
Tel: (+233-21) 221424

UNWTO affiliate member
WEST AFRICA TOURISM UNION (WATU)
FIELDS OF ACTIVITIES Destination Management Organization
Type of Business / Activity: Private / for-profit / international
UNWTO Membership since: 2007
Address
P.O. Box 7702
,Accra North
Telephone: 233-21244 261 435
Fax: 233-21248 709
Email: nabonsu@africaonline.com.gh

23. Guinea

Capital: Conakry	
Surface (sq. Kilometres)	245,860
Population (millions), 2007	9.96
Gross domestic product, current prices (USD billions), 2007	4.71
Gross domestic product, constant prices, annual percent change, 2007	1.51
Gross domestic product per capita, current prices, (USD), 2007	473.39
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,073.73
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	



Tourism Associations

- **Association Guinéenne des Professionnels de l'Hôtellerie et du Tourisme**
Boîte Postale 287
Conakry
Guinea
Tel: (+224) 30414681
Fax: (+224) 30411631

- **AGCETH / Association Guinéenne des Cadres et Employes du Tourisme et Hôtellerie**
Conakry
Guinea
Tel: (+224) 30412624
Fax: (+224) 30413075

Travel Agent Associations

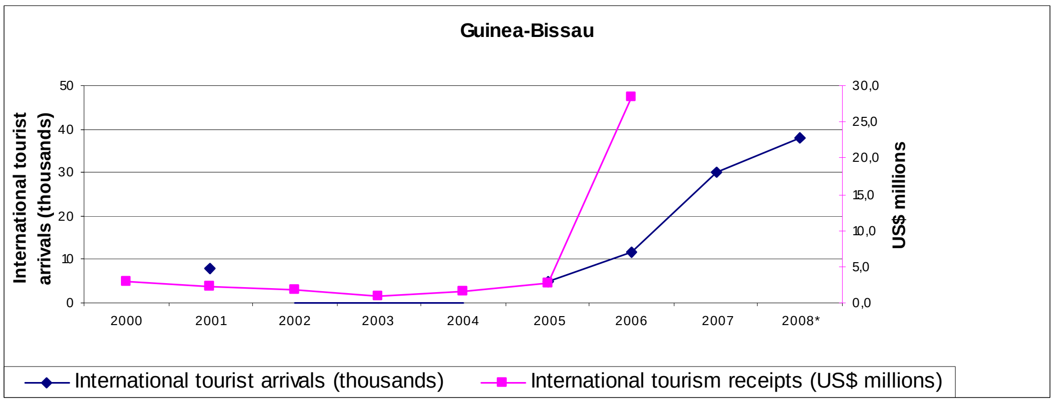
- **Syndicat Guinéen des Agences de Voyages et de Tourisme**
Boîte Postale 2959
Conakry
Guinea
Tel: (+224) 30414615
Fax: (+224) 30413456

Hotel Associations

- **Association des Hoteles de Guinée**
c/o Novotel Grand Hotel de l'Indépendance
Boîte Postale 287
Conakry
Guinea
Tel: (+224) 30415021
Fax: (+224) 30411631

24. Guinea-Bissau

Capital: Bissau	
Surface (sq. Kilometres)	36,120
Population (millions), 2007	1.67
Gross domestic product, current prices (USD billions), 2007	0.34
Gross domestic product, constant prices, annual percent change, 2007	2.48
Gross domestic product per capita, current prices, (USD), 2007	205.66
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	483.95
International tourist arrivals, 2007 (thousands)	30.00
International tourism receipts, 2007 (US$ millions)	28.00



Hotel Associations

- **Guinea-Bissau Hotel Association**

c/o HOTTI Hotel
Caixa Postal 107
Bissau 1602
Guinea-Bissau
Tel: (+245) 211251, 251251
Fax: (+245) 251152

25. Kenya

Capital: Nairobi	
Surface (sq. Kilometres)	580,370
Population (millions), 2007	34.65
Gross domestic product, current prices (USD billions), 2007	29.30
Gross domestic product, constant prices, annual percent change, 2007	7.00
Gross domestic product per capita, current prices, (USD), 2007	845.50
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,699.24
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	916.68

Tourism Associations

- **African Pro-Poor Tourism Development Centre**

2nd Floor, Kenindia House
Loita Street
P.O.Box 4293
00200 Nairobi
Kenya
Tel: (+254-20) 318522, 310276
Fax: (+254-20) 310276
E-Mail: info@propoortourism-kenya.org
Internet: http://www.propoortourism-kenya.org

- **The Kenya Tourism Foundation**

P.O.Box 51351
Nairobi
Kenya
Tel: (+254-20) 2714572
Fax: (+254-20) 2724823
E-Mail: admin@visitkenya.com
Internet: http://www.visitkenya.com

- **Ecotourism Society of Kenya (ESOK)**

P.O.Box 10146
00100 Nairobi
Kenya
Tel: (+254-20) 2724403, 2724755
Fax: (+254-20) 2719926
E-Mail: info@esok.org
Internet: http://www.esok.org

- **EcoClubs of Kenya**

E-Mail: ecoclubs-kenya@myway.com
Internet: http://www.ecoclubsofkenya.com

- **Kenya Tourism Federation**

KWS Complex, Langata Road
P.O.Box 15013
00509 Nairobi
Kenya
Tel: (+254-20) 4505614, 4604730, 4604729
Fax: (+254-20) 4505614
E-Mail: safetynet@form-net.com
Internet: http://seekenya.utando.com/
Internet: http://www.arcc.or.ke/tour.htm

- **Safaribase Tours Association**

P.O.Box 1249
00100 Nairobi
Kenya
Tel: (+254-20) 2341636, 2316654
Fax: (+254-20) 2316654
E-Mail: safaribase@yahoo.com

- **The Kenya Professional Safari Guides Association (KPSGA)**

P.O.Box 24397
Nairobi
Kenya
Tel: 8+254-20) 3877018, 3877374, 3877382
Fax: (+254-20) 4609355, 4604730
E-Mail: kpsga@wananchi.com
Internet: **http://www.safariguides.org**

Youth Hostel Associations

- **Kenya Youth Hostels Association**

P.O.Box 48661
Ralph Bunche Road
Nairobi 00100
Kenya
Tel: (+254-20) 2723012, 2724862
Fax: (+254-20) 2724862

E-Mail: info@yhak@org
Internet: http://www.yhak.org

Travel Agent Associations

- **KATA / The Kenya Association of Travel Agents**

P.O.Box 14592
Nairobi
Kenya
Tel: (+254-20) 3867273
Fax: (+254-20) 3867273
E-Mail: ngurekev@arcc.or.ke
Internet: http://www.katakenya.org

Tour Operator Associations

- **The Kenya Association of Tour Operators (KATO)**

Longonot Road
Off Kilimanjaro Avenue
Upper Hill
P.O.Box 48461
00100 Nairobi
Kenya
Tel: (+254-20) 2713348, 2713386, 2722401, 2726517
Fax: (+254-20) 2719226
E-Mail: info@katokenya.org
Internet: http://www.katokenya.org

- **The Kenya Association of Tour Operators (KATO)**

Mombasa Branch Office
P.O.Box 84198
Mombasa
Kenya
Tel: (+254-41) 2227721
Fax: (+254-41) 2314502
E-Mail: info@katokenya.org
Internet: http://www.katokenya.org

Hotel Associations

- **Hotel & Restaurants Authority**

P.O.Box 30027
Utalii House
Uhuru Highway
Nairobi
Kenya
Tel: (+254-20) 2331030
Fax: (+254-20) 2217604
Internet: http://www.all-hotels.com/africa/kenya.htm

- **The Kenya Association of Hotelkeepers and Caterers (KAHC)**

P.O.Box 46406
Heidelberg House, 2nd Floor
Mombasa Road
Nairobi
Kenya
Tel: (+254-20) 4602538, 4604419
Fax: (+254-20) 4602539
E-Mail: info@kahc.co.ke
Internet: http://www.kahc.com

- **The Kenya Association of Hotelkeepers and Caterers (KAHC) Mombasa Branch**

P.O.Box 83378
Mombasa
Kenya
Tel: (+254-41) 2312504, 2228208
Fax: (+254-41) 2228208

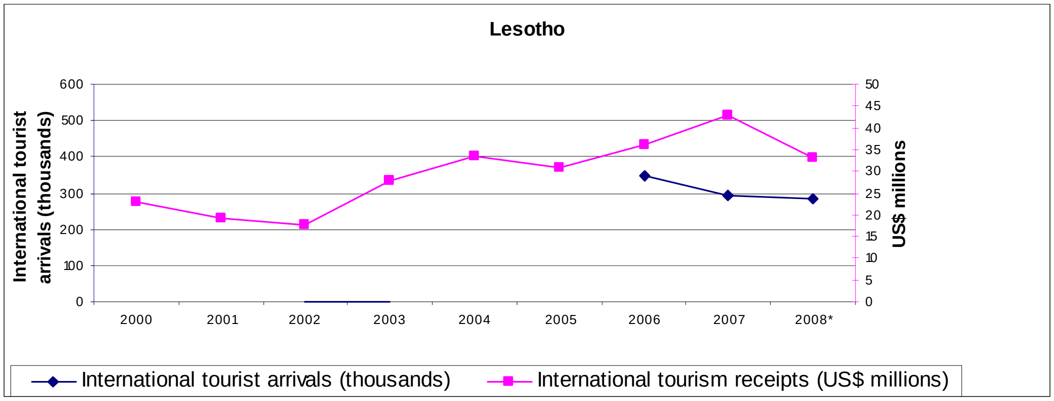
- **The Kenya Budget Hotels Association**

P.O.Box 20130
Nairobi
Kenya
Tel: (+254-20) 2335420
Fax: (+254-20) 2217500

Kenya Hotels Guide
Internet: http://www.kenyahotelsguide.com

26. Lesotho

Capital: Maseru	
Surface (sq. Kilometres)	**30,350**
Population (millions), 2007	**2.41**
Gross domestic product, current prices (USD billions), 2007	**1.60**
Gross domestic product, constant prices, annual percent change, 2007	**4.90**
Gross domestic product per capita, current prices, (USD), 2007	**664.71**
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	**1,284.57**
International tourist arrivals, 2007 (thousands)	**292.18**
International tourism receipts, 2007 (US$ millions)	**43.00**



Tourism Associations

- [Lesotho Council for Tourism]

P.O.Box 10526
Maseru 100
Lesotho
Tel: (+266) 22334484
Fax: (+266) 22323561

Tour Operator Associations

- [Tour Operator Association of Lesotho TOAL]

P.O.Box 039
Maseru West 105
Lesotho
Tel: (+266) 22313807, 22321829
Tel: (+266) 58851962 cell.
Fax: (+266) 22322861
E-Mail: masebina@ilesotho.com
Internet: zhttp://www.ltdc.org.ls/tours

Hotel Associations

- [Lesotho Hotels & Hospitality Association]

P.O.Box 1072
Maseru 100
Lesotho

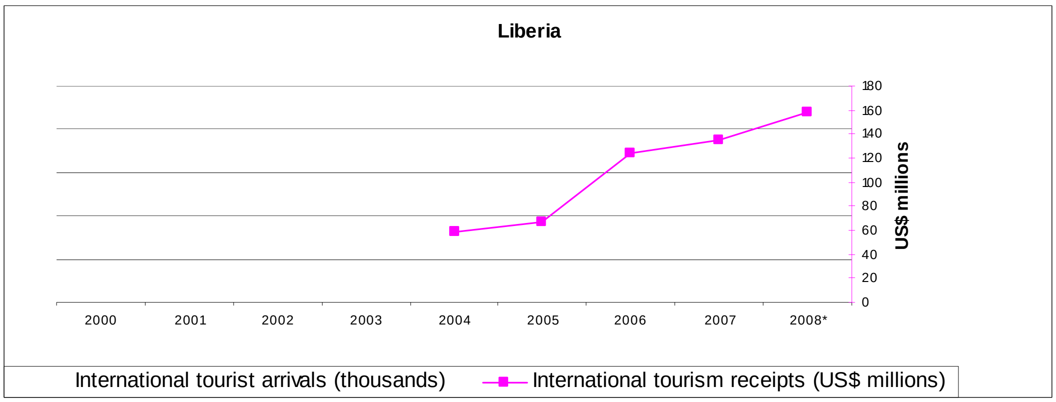
Youth Hostel Associations

- [Lesotho Youth Hostels Association]

P.O.Box 9700
Maseru 100
Lesotho
Tel: (+266) 22312900
Fax: (+266) 22311969

27. Liberia

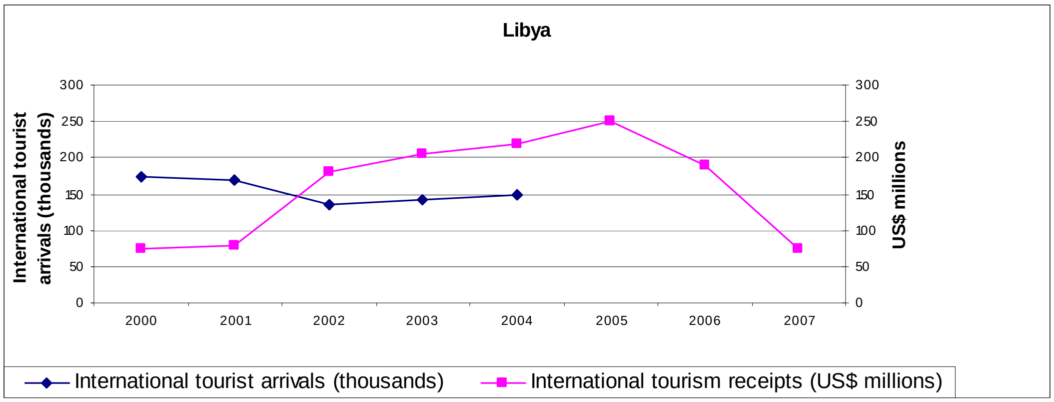
Capital: Monrovia	
Surface (sq. Kilometres)	111,370
Population (millions), 2007	3.75
Gross domestic product, current prices (USD billions), 2007	0.73
Gross domestic product, constant prices, annual percent change, 2007	9.40
Gross domestic product per capita, current prices, (USD), 2007	194.53
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	357.21
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	135.00



No associations found.

28. Libya

Capital: Tripoli	
Surface (sq. Kilometres)	1,759,500
Population (millions), 2007	6.09
Gross domestic product, current prices (USD billions), 2007	57.06
Gross domestic product, constant prices, annual percent change, 2007	6.78
Gross domestic product per capita, current prices, (USD), 2007	9,371.62
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	12,276.51
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	74.00



Tourism Associations

- [Tourist Services Association]

Tripoli
Libya
Tel: (+218-21) 3333320
Fax: (+218-21) 3333320

Tourism Investment Services

- [Social Security Fund]

Project and Tourism Investment Department
Tripoli
Libya
Tel: (+218-21) 3705154
Fax: (+218-21) 3705597, 3705599

Tour Operator Associations

- [Libyan Tourism & Travel Association]

Tripoli
Libya
Tel

Youth Hostel Associations

- [Libyan Youth Hostel Association]

P.O.Box 8886
69 Amr Ben Al-Aas Street
Tripoli
Libya
Tel: (+218-21) 4445171
Fax: (+218-21) 3330118

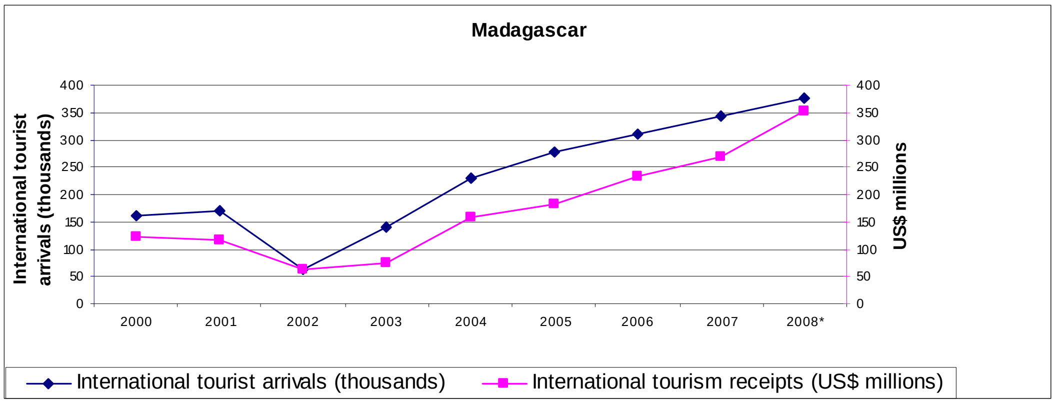
Tourism Development Corporation

- [Hotel Investment Office at the Socialist Security Fund]

P.O.Box 82916
Tripoli
Libya
Tel: (+218-21) 4444344, 4440404, 4444145
Fax: (+218-21) 4446091, 4444745

29. Madagascar

Capital: Antananarivo	
Surface (sq. Kilometres)	587,040
Population (millions), 2007	16.97
Gross domestic product, current prices (USD billions), 2007	7.32
Gross domestic product, constant prices, annual percent change, 2007	6.29
Gross domestic product per capita, current prices, (USD), 2007	431.43
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,067.72
International tourist arrivals, 2007 (thousands)	344.00
International tourism receipts, 2007 (US$ millions)	267.00



Tourism Associations

- **GAST / Groupement des Associations et des Syndicats du Tourisme de Magadascar**

Boîte Postale 465
Antananarivo 101
Madagascar
Tel: (+261-20) 2227680, 2222230
Fax: (+261-20) 2234901

- **GLVM / Association of Rental Car Agencies of Madagascar**

c/o AVIS
3, Rue Patrice Lumumba
Antananarivo
Madagascar
Tel: (+261-20) 2234080, 2220435
Fax: (+261-20) 2221657

Travel Agent Associations

- **Association of Travel Agencies of Madagascar (AAMV)**

c/o Transcontinents
Boîte Postale 541
10 Avenue de l'Independance
Antananarivo
Madagascar
Tel: (+261-20) 2222398
Fax: (+261-20) 2228365

Tour Operator Associations

- **Association Professionnelledes Tour Operator Réceptifs de Madagascar (TOP)**

Enceinte Espace Dera
Route de l'Université
Tsiadana
Boîte Postale 5118
Antananarivo 101
Madagascar
Tel: (+261-20) 2266582
Fax: (+261-20) 2238864
E-Mail: topmad@dts.mg
Internet: http://www.madagascar-guide.com/top

- **Groupement des Associations et Syndicats du Tourisme a Madagascar**

c/o SOFITRANS
2 Avenue Andranampoinemerina
Antananarivo
Madagascar
Tel: (+261-20) 2222330
Fax: (+261-20) 2220393

- **Go To Madagascar**

5 Rue Raveloary, Isoraka
Antananarivo 101
Madagascar **Tel: (+261-20) 2224563**
Fax
E-Mail: sei@dts.mg
Internet: http://www.go2mada.com

Hotel Associations

- **Fédération des Hoteliers & Restaurateurs de Madagascar FHORM**

1B6, 5, rue Raveloary
Isoraka
Antananarivo 101
Madagascar
Tel: (+261-20) 2224690
Fax

E-Mail: fhorm@simicro.mg
Internet: http://www.hotels-restaurants-madagascar.com

- **Syndicat de l'Industrie Hotelière de Madagascar (SIHM)**
c/o SOFITRANS
2, Avenue Andranampoinemerina
Antananarivo
Madagascar
Tel: (+261-20) 2222330
Fax: (+261-20) 2220393

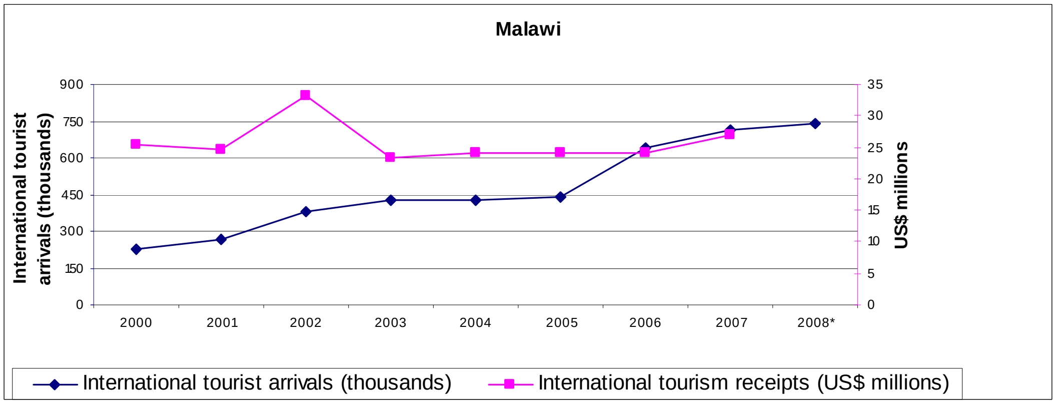
- **Société Hotellière et Touristique de Madagascar**
Antananarivo
Madagascar
Tel: (+261-20) 2225184
Fax: (+261-20) 2228031

- **Société Hotellière et Touristique de Madagascar**
Boîte Postale 37
Fort Dauphin
Madagascar
Tel: (+261-20) 9221238
Fax: (+261-20) 9221132

- **Association of Hotels and Restaurants Keepers of Tananarive**
c/o Le Hintsy
Ambohimanambola
Boîte Postale 8421
Antananarivo
Madagascar
Tel: (+261-20) 2226379, 222641

30. Malawi

Capital: Lilongwe	
Surface (sq. Kilometres)	118,480
Population (millions), 2007	13.39
Gross domestic product, current prices (USD billions), 2007	3.54
Gross domestic product, constant prices, annual percent change, 2007	7.40
Gross domestic product per capita, current prices, (USD), 2007	264.31
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	785.41
International tourist arrivals, 2007 (thousands)	714.00
International tourism receipts, 2007 (US$ millions)	27.00



Tourism Associations

- **Malawi Tourism Association**

Aquarius House
P.O.Box 1044
Lilongwe
Malawi
Tel: (+265) 1770010
Fax: (+265) 1770131
E-Mail: mta@malawi.net
Internet: http://www.malawitourism.com
Internet: http://www.malawi-tourism-association.org.mw

- **Malawi Catering Services**

P.O.Box 30236
Lilongwe 3
Malawi
Tel: (+265) 1700031
Fax: (+265) 1700730

- **Car Hire Association of Malawi**

c/o SS Rent A Car
20 Glyn Jones Road
P.O.Box 2282
Blantyre
Malawi
Tel: (+265) 1622836, 1621597
Fax: (+265) 1625074
E-Mail: info@ssrentacar.com

Travel Agent Associations

- **MTAA / Travel Agents Association of Malawi**

P.O.Box 268
Blantyre
Malawi
Tel: (+265) 1634533
Fax: (+265) 1671856

Tour Operator Associations

- **Tour Operators Association of Malawi**

c/o Malawi Tourism Association
Aquarius House
P.O.Box 1044
Lilongwe
Malawi
Tel: (+265) 1770010
Fax: (+265) 1770131
E-Mail: mta@malawi.net
Internet: http://www.malawitourism.com

Hotel Associations

- **The Tourism and Hotels Board**

P.O.Box 30500
Blantyre
Malawi
Tel: (+265) 1651611

- **Hotels and Catering Association**

P.O.Box 1126
Blantyre
Malawi
Tel: (+265) 1622966
Fax: (+265) 1621215

- **Malawi Tourism Association**

Aquarius House
P.O.Box 1044
Lilongwe
Malawi
Tel: (+265) 1770010
Fax: (+265) 1770131
E-Mail: mta@malawi.net
Internet: http://www.malawitourism.com

31. Mali

Capital: Bamako	
Surface (sq. Kilometres)	1,240,190
Population (millions), 2007	13.06
Gross domestic product, current prices (USD billions), 2007	6.75
Gross domestic product, constant prices, annual percent change, 2007	2.48
Gross domestic product per capita, current prices, (USD), 2007	516.52
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,031.05
International tourist arrivals, 2007 (thousands)	164.00
International tourism receipts, 2007 (US$ millions)	221.00

Hotel Associations

- **Fédération Nationale des Hôteliers, Rectaurateurs et Escapes de Loisirs du Mali**

Boîte Postale 3216
Immeuble Lafia Hamdallaye ACI
Bamako
Mali
Tel: (+223) 20292469, 20292469
Fax: (+223) 20292468

- **Association des Hôteliers, Restaurateurs et Escapes de Loisirs de Bamako**

Boîte Postale 3216
Immeuble Lafia Hamdallaye ACI
Bamako
Mali
Tel: (+223) 20292469
Fax: (+223) 20292468

Travel Agent Associations

- **Association Malienne des agencies de Voyages et de Tourisme**

c/o Timbouctours SARL
Boîte Postale 222
Rue 390, Porte 1478
ACI 2000 Hamdallaye
Bamako
Mali
Tel: (+223) 20294810
Tel: (+223) 6753020
Fax: (+223) 20294808
E-Mail: tbt@cefib.com
Internet: http://www.timbuctours.com

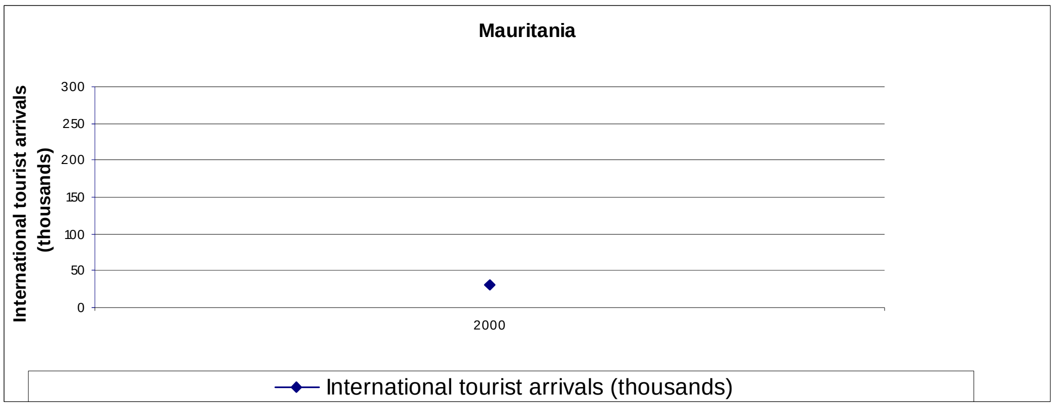
Tour Guide Associations

- **Association des Guides Touristiques du Mali (AGTM)**

c/o TAM Voyages
Boîte Postale 932
Bamako
Mali
Tel: (+223) 20225693, 20219210, 20219117
Fax: (+223) 20220547
E-Mail: tamvoyage@cefib.com

32. Mauritania

Capital Nouakchott	
Surface (sq. Kilometres)	1,030,700
Population (millions), 2007	2.96
Gross domestic product, current prices (USD billions), 2007	2.76
Gross domestic product, constant prices, annual percent change, 2007	0.94
Gross domestic product per capita, current prices, (USD), 2007	930.84
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	2,008.21
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	



Tourism Associations

- **Association des Scouts et des Guides Mauritaniens**
Sebkha
Nouakchott
Mauritania
Tel: (+222) 5256066

- **Association Professionnelle du Tourisme**
Boîte Postale 5997
Nouakchott
Mauritania
Tel: (+222) 5252808
Fax: (+222) 5252810

- **Fédération des Banques, Tourisme et Services (F.B.T.S.)**
Boîte Postale 383
Nouakchott
Mauritania
Tel: (+222) 5290769
Fax: (+222) 5254606

- **FNT Fédération Nationale de Transport**
Boîte Postale 4715
Nouakchott
Mauritania
Tel: (+222) 5257936, 5254738

- **Sahel Consortium des Opérateurs èconomiques Mauritaniens (S.C.O.E.M.)**
Branche Tourisme
c/o Randonnées Tours
22 Avenue du Général de Gaule
Boîte Postale 4992
Nouakchott
Mauritania
Tel: (+222) 5294051, 5259535, 5252810
Fax: (+222) 5259539
E-Mail: scoem@toptechnology.mr

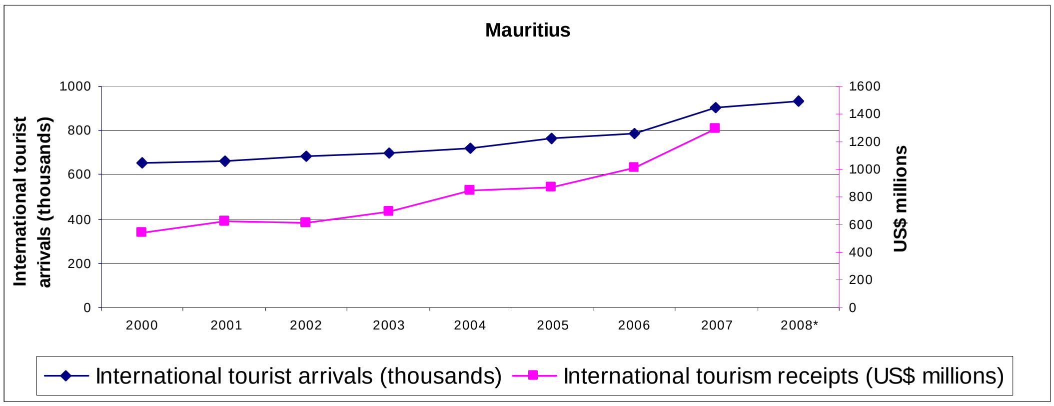
Hotel Associations

- **SOMASERT / Société Mauritanienne de Service et de Tourisme**
Oasian Hotel
Boîte Postale 42
Nouadhibou
Mauritania
Tel: (+222) 5749029
Fax: (+222) 5749043

- **SMTH Société Mauritanienne de Tourisme et de l'Hôtellerie**
Boîte Postale 552
Nouakchott
Mauritania
Tel: (+222) 5253351

33. Mauritius

Capital: Port Louis	
Surface (sq. Kilometres)	2,040
Population (millions), 2007	1.26
Gross domestic product, current prices (USD billions), 2007	6.96
Gross domestic product, constant prices, annual percent change, 2007	4.55
Gross domestic product per capita, current prices, (USD), 2007	5,520.15
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	11,152.47
International tourist arrivals, 2007 (thousands)	906.97
International tourism receipts, 2007 (US$ millions)	1,299.37



Travel Agent Associations

- **MAITA / Mauritius Association of IATA Travel Agents**

c/o Atlas Travel Services
E. Laurent Street
Port Louis
Mauritius
Tel: (+230) 2081497
Fax: (+230) 2087771

Tour Operator Associations

- **AIOM / Association of Incoming Agencies of Mauritius**

c/o Bonny Air Travel & Tours Ltd.
Fong Sing Building
St. Louis Street
Port Louis
Mauritius
Tel: (+230) 2125688
Fax: (+230) 2085727
E-Mail: bonny@intnet.mu

- **ARTO / Association of Rodrigues Tour Operators**

c/o Mourouk Ebony
Pate Reynieux
Mauritius
Tel: (+230) 8323351/2/3/4
Fax: (+230) 8323355
E-Mail: ebony@intnet.mu

- **TAPA / Tourism Activity Professionals Association**

Desforges Street
Port Louis
Mauritius
Tel

Hotel Associations

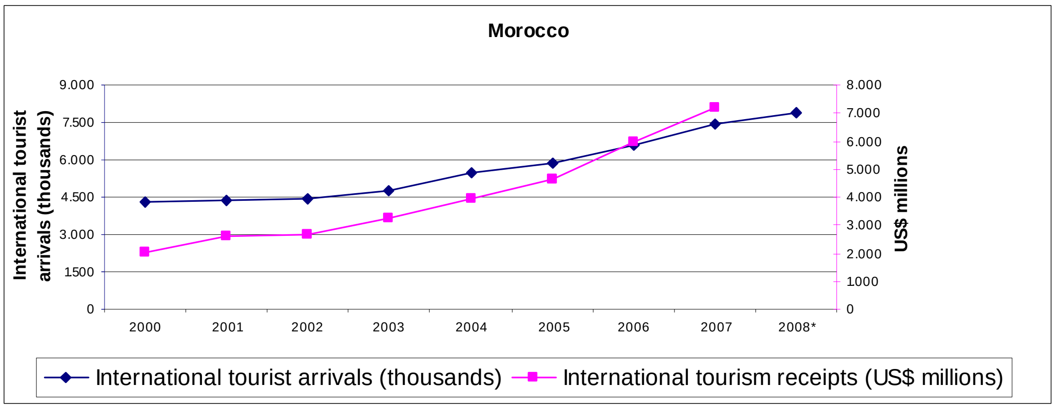
- **A.H.R.I.M. / Association des Hôteliers et Restaurateurs de l'Ile Maurice**

7th Floor, Travel House
Sir William Newton Street
Port Louis
Mauritius
Tel: (+230) 2117359, 2114758, 2116105
Fax: (+230) 2119944, 2117359
E-Mail: ahrim@intnet.mu
Internet: http://www.mauritius.net/ahrim

For more links/information see http://www.bernard-krief.com/espaceinformation/documentation/tourism/Mauritius_Country_Profile.pdf

34. Morocco

Capital: Rabat	
Surface (sq. Kilometres)	446,600
Population (millions), 2007	30.73
Gross domestic product, current prices (USD billions), 2007	73.43
Gross domestic product, constant prices, annual percent change, 2007	2.20
Gross domestic product per capita, current prices, (USD), 2007	2,389.38
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	4,075.62
International tourist arrivals, 2007 (thousands)	7,407.62
International tourism receipts, 2007 (US$ millions)	7,162.05



Tourism Associations

- **Fédération Marocaine du Tourisme**

c/o Hôtel Almoravides
Marrakech 40000
Morocco
Tel: (+212) 524445142
Fax: (+212) 524443132

- **Fédération Nationale des Syndicats des Transporteurs Routiers de Voyageurs (FNSTRV)**

40, Boulevard d'Anfa
Casablanca
Morocco
Tel: (+212) 522268666
Fax: (+212) 522220058

- **Groupement Régional d'Intérêt Touristique d'Agadir**

Avenue Hassan II
Immeuble Chambre de Commerce et d'Industrie
Boîte Postale 240
Agadir
Morocco
Tel: (+212) 528842629, 528842638
Fax: (+212) 528842595

- **Groupement Régional d'Intérêt Touristique de Fes**

9 Rue de Lybie
Fes
Morocco
Tel: (+212) 535652816/7/8
Fax: (+212) 535621776

- **Groupement Régional d'Intérêt Touristique de Marrakech**

170, avenue Mohammed V, Gueliz
Marrakech
Morocco
Tel: (+212) 524430886, 524431377
Fax: (+212) 524439497, 524430886

- **Groupement Régional d'Intérêt Touristique de Tanger/Tetouman**

c/o COMARIT
7, Rue du Mexique
Tanger
Morocco
Tel: (+212) 539320459
Fax: (+212) 539949286

- **Société Nationale d'amenagement de la Baie d'Agadir (SONABA)**

Boîte Postale 348
Avenue My Agdellah, Immeuble A
Agadir
Morocco
Tel: (+212) 528841895, 528832338, 528842295, 528842338
Fax: (+212) 528822495

- **Société d'Amenagement de la Baie de Tanger (SNABT)**

24, Rue Lavayette
Tanger
Morocco
Tel: (+212) 539942440/1, 539942640/1
Fax: (+212) 539946505

Travel Agent Associations

- **FNAVM / Fédération Nationale des Agences de Voyages du Maroc (FNAVM)**

10, Rue Jilali Oraibi
Casablanca
Morocco
Tel: (+212) 522260300, 522472968
Fax: (+212) 522277963
E-Mail: fnavm@casanet.net.ma

- **Association des Agences de Voyages specialises en Tourisme de Nature et de Sport**

42 Avenue de l'Istiqlai
Kenitra
Morocco
Tel: (+212) 537375354
Fax: (+212) 537374009

- **Association Provinciale des Operateurs de Tourisme de Marrakech (APOTM)**

170, Avenue Mohamed V
Marrakech
Morocco
Tel: (+212) 524433118, 524430886
Fax: (+212) 524436769, 524438974

- **Association Régionale des Agences de Voyages de Marrakech (ARAVM)**

Villa 8/272 Lotissement Touari
Gueliz
Marrakech
Morocco
Tel: (+212) 524439491, 524418293
Fax: (+212) 524439491, 524446575

- **Association Régionale des Agences de Voyages d'Oujda (ARAVO)**

17 Angle Bd. Zerktouni et Rue My Ahmed Laghrari
Oujda
Morocco
Tel: (+212) 556685110
Fax: (+212) 556682793

- **Association Régionale des Agences de Voyages de Rabat & Region (ARAVRR)**

28 Bis, Av. Allal Benabdellah
Rabat
Morocco
Tel: (+212) 537778546
Fax: (+212) 537775321

- **Association Régionale des Agences de Voyages du Nord (ARAVN)**

139, Av. Beethoven
Immeuble Hamza
Tanger
Morocco
Tel: (+212) 539941837
Fax: (+212) 539945348

- **Association Régionale des Agences de Voyages de Fes (ARAVF)**

Rue de Tourquie No. 9
Fes
Morocco
Tel: (+212) 535652816
Fax: (+212) 535621776

- **Association Régionale des Agences de Voyages d'Agadir (ARATAS)**

Av. Hassan II
Boîte Postale 272
Agadir
Morocco
Tel: (+212) 528841220, 528841913
Fax: (+212) 528841849

- **Association Régionale des Agences de Voyages de Casablanca (AVC)**

53, Rue Allal Ben Abdellah
Casablanca
Morocco
Tel: (+212) 522540521/2
Fax: (+212) 522540523

Hotel Associations

- **Fédération Nationale de l'Industrie Hôtelière (FNIH)**

Angle Av. Nador & Rue 3 Polo
Casablanca 20550
Morocco
Tel: (+212) 522800487
Fax: (+212) 522800315
E-Mail: fnih@iam.net.ma

- **Association Régionale de l'Industrie Hôteliére d'Agadir**

Hotel Sahara
Avenue Mohamed V
Agadir
Morocco
Tel: (+212) 528840660
Fax: (+212) 528840648

- **Association Régionale de l'Industrie Hôteliére de Beni-Mellal**

Hôtel Chems
Route de Marrakech
Boîte Postale 68
Beni Mellal
Morocco
Tel: (+212) 523483460
Fax: (+212) 523483987

- **Association Régionale de l'Industrie Hôteliére de Casablanca**

Angle Av. Nador & Rue 3 Polo
Casablanca 20550
Morocco
Tel: (+212) 522800645
Fax: (+212) 522800645

- **Association Régionale de l'Industrie Hôteliére de Errachidia**

Hôtel Tafilalet
Avenue Moulay Ismail
Erfoud
Morocco
Tel: (+212) 545576535, 545576881
Fax: (+212) 545576036

- **Association Régionale de l'Industrie Hôteliére de Fès**

Hôtel Jnan Fès
Avenue Ahmed Chawki
Fès
Morocco
Tel: (+212) 535652230, 545653965
Fax: (+212) 535651917

- **Association Régionale de l'Industrie Hôteliére de Marrakech**

Immeuble Habous, App. No. 13
Avenue Allal El Fassi, entrée 6
Marrakech
Morocco
Tel: (+212) 524313309
Fax: (+212) 524303929

- **Association Régionale de l'Industrie Hôteliére de Meknes**

Hôtel Rif
Zankat Akra
Meknes
Morocco
Tel: (+212) 535522591/2/3, 535522594
Fax: (+212) 535524428, 535626720

- **Association Régionale de l'Industrie Hôtelière de Ouarzazate**

Hôtel Berbère Palace

Rue Mansour Dahbi
Ouarzazate
Morocco
Tel: (+212) 524883105, 524883084
Fax: (+212) 524883071, 524882020

- **Association Régionale de l'Industrie Hôteliére de Oujda**
Hôtel Al Massira
Boulevard Maghreb El Arabi
Oujda
Morocco
Tel: (+212) 556710797, 556705121
Fax: (+212) 556680477

- **Association Régionale de l'Industrie Hôteliére de Rabat**
Fanadek Investment
Résidence des tulipes
23, rue Assafi
Rabat
Morocco
Tel: (+212) 537762466
Fax: (+212) 537762468

- **Association Régionale de l'Industrie Hôteliére de Tanger**
Hôtel Sheherazade
Avenue des FAR
Tanger
Morocco
Tel: (+212) 539940802/3, 539940502
Fax: (+212) 539940801, 539940809

- **Association Régionale de l'Industrie Hôteliére de Tetouan**
Hôtel Safir
Route de Sebta
Tatouan
Morocco
Tel: (+212) 539970144, 539970177
Fax: (+212) 539970692

Youth Hostel Associations

- **Fédération Royale Marocaine des Auberges de Juenes**
Boîte Postale 15998
Parc de la Ligue Arabe
Immeuble Principal
Casablanca 21000
Morocco
Tel: (+212) 522220551, 522470952
Fax: (+212) 522227677
Internet: http://www.frmaj.org.ma

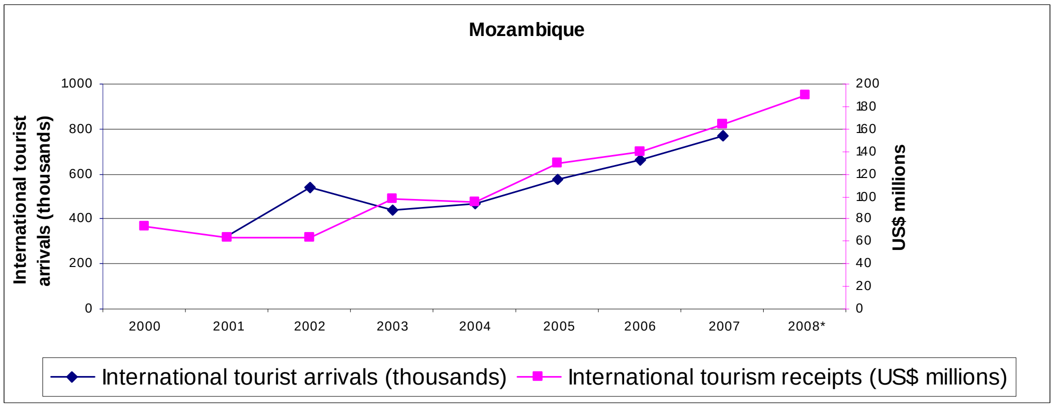
- **Service de Tourisme Culturel et des Centres d'Accueil**
6, Rue Soumaya
Rabat
Morocco
Tel: (+212) 537670192
Fax: (+212) 537670175

UNWTO AFFILIATE MEMBER

- FÉDÉRATION NATIONALE DES AGENCES DE VOYAGES DU MAROC

35. Mozambique

Capital: Maputo	
Surface (sq. Kilometres)	799,380
Population (millions), 2007	20.50
Gross domestic product, current prices (USD billions), 2007	7.56
Gross domestic product, constant prices, annual percent change, 2007	7.03
Gross domestic product per capita, current prices, (USD), 2007	368.68
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	830.10
International tourist arrivals, 2007 (thousands)	770.00
International tourism receipts, 2007 (US$ millions)	163.40



Tourism Associations

- **Associação Moçambicana de Hotelaria e Turismo (AMOHTUR)**

Avenida Karl Marx 190 r/c
Maputo
Mozambique
Tel: (+258-21) 425562
Fax: (+258-21) 425562

Hotel Associations

- **Associação dos Hotéis do Sul de Moçambique (A.H.S.M.)**

Rua da Sé
Hotel Rovuma
Loja 35 e 36
Maputo
Mozambique
Tel: (+258-21) 314970
Fax: (+256-1) 314969
E-Mail: ahsm@tvcabo.co.mz

- **Associação da Indústria Hoteleira**

Avenida Karl Marx 186/190 r/c
Maputo
Mozambique
Tel: (+258-21) 425562
Fax: (+256-1) 425562

- **PROMOTEL / Sociedade de Promoção Hoteleira**

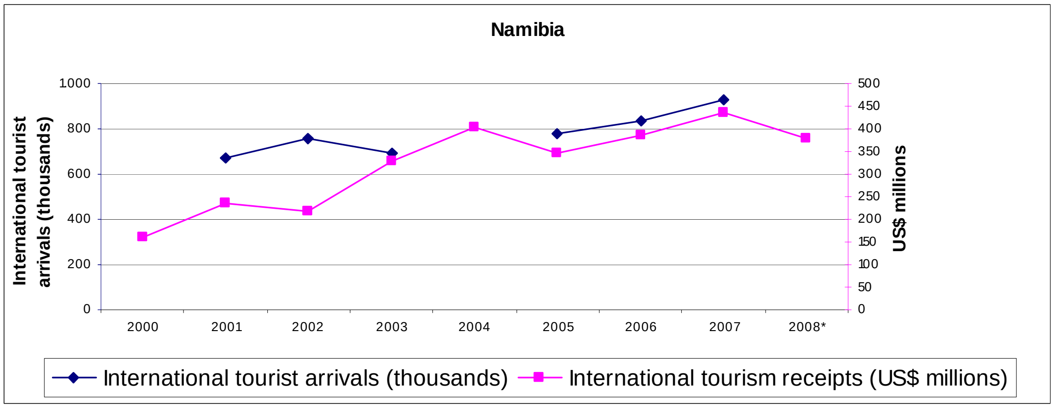
Avenida Zedequias Manganhela 1608 r/c
Maputo
Mozambique
Tel: (+258-21) 420546

- **Sociedade Hoteís de Moçambique Lda.**

Caixa Postal 340
Avenida 25 de Setembro 1321
Maputo
Mozambique
Tel: (+258-21) 307600/8, 422005, 426153
Fax: (+258-21) 307609, 424937
E-Mail: tivoli@teledata.mz
Internet: http://www.odline.com

36. Namibia

Capital: Windhoek	
Surface (sq. Kilometres)	824,290
Population (millions), 2007	2.07
Gross domestic product, current prices (USD billions), 2007	7.40
Gross domestic product, constant prices, annual percent change, 2007	4.41
Gross domestic product per capita, current prices, (USD), 2007	3,583.54
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	5,188.80
International tourist arrivals, 2007 (thousands)	929.00
International tourism receipts, 2007 (US$ millions)	434.04



Tourism Associations

- **FENATA / Federation of Namibian Tourism Associations**

P.O.Box 21783
Windhoek
Namibia
Tel: (+264-61) 230521
Fax: (+264-61) 238707
E-Mail: fenata@mweb.com.na

- **Classic Safari Camps of Africa**

Internet: http://www.classicsnamibia.com

- **NACOBTA / Namibia Community Based Tourism Association**

P.O.Box 86099
Windhoek
Namibia
Tel: (+264-61) 221918, 250558 administration
Tel: (+264-61) 255977 bookings
Fax: (+264-61) 222647 administration
Fax: (+264-61) 255957 bookings
E-Mail: office@nacobta@iway.na (administration)
E-Mail: nacobta@iafrica.com.na (bookings)
Internet: http://www.nacobta.com.na
(Weber Street 3, Near Politechnic)

- **TRENABA / Tourist Related Namibian Business Association**

P.O.Box 11463
Windhoek
Namibia
Tel: (+264-61) 250558
Fax: (+264-61) 245756
E-Mail: africuri@mweb.com.na

Travel Agent Associations

- **ANTA / Association of Namibian Travel Agents**

P.O.Box 23113
Windhoek
Namibia
Tel: (+264-61) 236670
Fax: (+264-61) 227575
E-Mail: merrillp.ritzreise@galileosa.co.za

Tour Operator Associations

- **TASA / Tour and Safari Association of Namibia**

P.O.Box 11534
Windhoek
Namibia
Tel: (+264-61) 255422, 238423
Fax: (+264-61) 238424
E-Mail: info@tasa.na
Internet: http://www.tasa.na

- **CARAN / Car Rental Association of Namibia**

P.O.Box 90385
Windhoek
Namibia
Tel: (+264-61) 246708
Fax: (+264-61) 246709
E-Mail: caran@natron.net

Tour Guide Associations

- **Tour Guides' Association of Namibia (TAN)**

Windhoek
Namibia
Tel
Fax
E-Mail: marleecej@wilderness.com.na

Hotel Associations

- **HAN / Hospitality Association of Namibia**

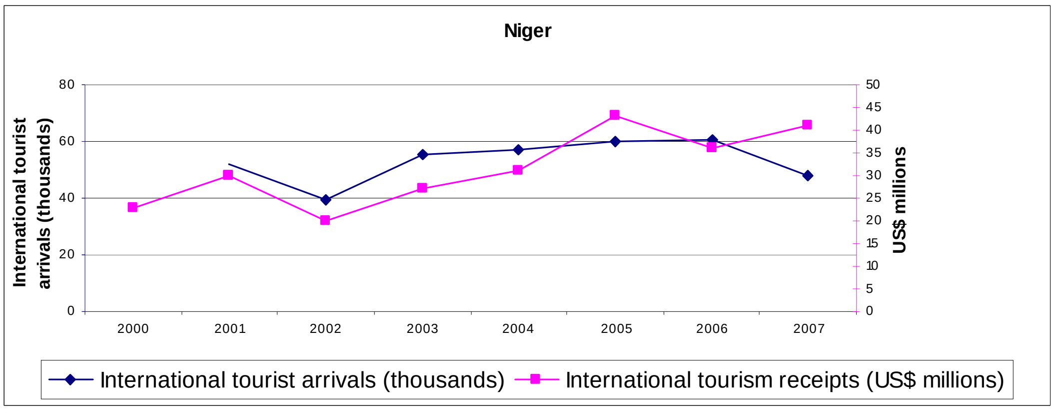
P.O.Box 86078
Windhoek
Namibia
Tel: (+264-61) 222903/4
Fax: (+264-61) 222904
E-Mail: han@namib.com
E-Mail: han@mweb.com.na
Internet: http://www.hannamibia.com

- **HAN / Hospitality Association of Namibia, Southern Region**

P.O.Box
Mariental
Namibia
Tel: (+264-63) 240529
Fax: (+264-63) 240516
Internet: http://www.natron.net/han

37. Niger

Capital: Niamey	
Surface (sq. Kilometres)	1,267,000
Population (millions), 2007	13.35
Gross domestic product, current prices (USD billions), 2007	4.17
Gross domestic product, constant prices, annual percent change, 2007	3.20
Gross domestic product per capita, current prices, (USD), 2007	312.67
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	666.77
International tourist arrivals, 2007 (thousands)	48.00
International tourism receipts, 2007 (US$ millions)	41.18



Travel Agent Associations

- **ANPTH / Association des Professionnels de Tourisme et de l'Hôtellerie du Niger**
c/o Siege Grand Hotel du Niger
Boîte Postale 10734
Niamey
Niger
Tel: (+227) 20732252

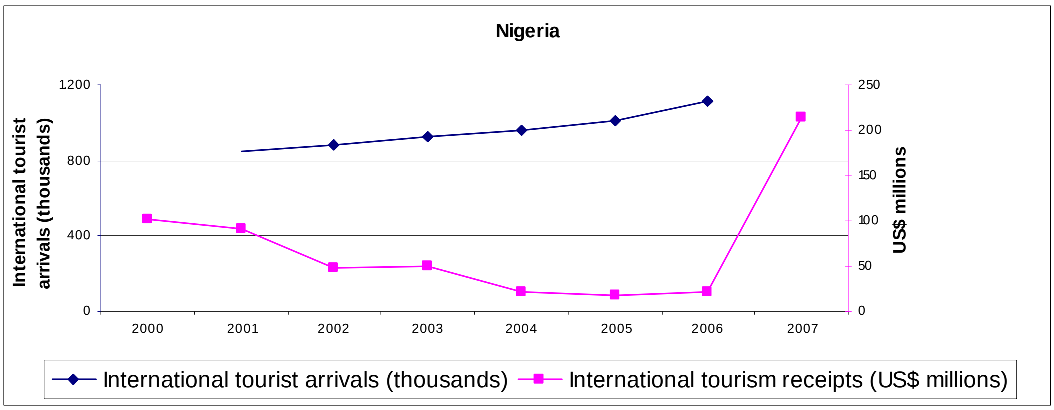
- **Syndicat du Tourisme du Niger STN**
Niamey
Niger
Tel: (+227) 20983384

Hotel Associations

- **Association des Hoteles de la Republique du Niger**
c/o Hotel Gaweye
B.P. 11008
Niamey
Niger
Tel: (+227) 20722710, 20723400
Fax: (+227) 20723347
E-Mail: gaweye@intnet.ne

38. Nigeria

Capital: Abuja	
Surface (sq. Kilometres)	923,770
Population (millions), 2007	143.85
Gross domestic product, current prices (USD billions), 2007	166.78
Gross domestic product, constant prices, annual percent change, 2007	6.35
Gross domestic product per capita, current prices, (USD), 2007	1,159.36
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	2,034.58
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	215.00



Tourism Associations

- **[Africa Travel Association, Nigeria Chapter]**

c/o Le Meridien Eko Hotels
Adetokunbo Ademola Street
Victoria Island
P.O.Box 12724
Lagos
Nigeria
Tel: (+234-1) 2624600, 2614444
Fax: (+234-1) 2615205, 2618083

- **[ATPN / Association of Tourism Practitioners of Nigeria]**

No. 25, Apollo Crescent
Jos, Plateau State
Nigeria
Tel: (+234-73) 460946
Fax: (+234-73) 460946

- **[FTAN / Federation of Tourism Associations of Nigeria]**

195 Ikorodu Road
Palm Grove
Lagos
Nigeria
Tel: (+234-1) 4932774
Fax: (+234-1) 2610464, 4961327

- **[Eco-Nigeria]**

[Ecotourism Society of Nigeria]
Port Harcourt
Nigeria
Tel
Fax
E-Mail: ecotourismnigeria@yahoo.com

- **[Eko-Beaches Tourism Promoters Association]**

First Gate, Oll. Bar-Beach Tower
Victoria Island
P.O.Box 10553
Lagos
Nigeria
Tel

- **[National Association of Tourist Boat Operators and Water Transporters (NATBOWAT)]**

National Secretariat
Tarzan Boat Jetty Maroko Foreshore
Oposite Moroko Police Station
P.O.Box 75211
Lagos
Nigeria
Tel: (+234-90) 404562

Hotel Associations

- **[NHA / Nigeria Hotel Association]**

c/o Ikoyi Hotel
Kingsway Road
P.O.Box 895
Ikoyi
Lagos
Nigeria
Tel: (+234-1) 2691522/-31
Tel: (+234-1) 2884411 President
Fax: (+234-1) 2880839 attn. President NHA

- Travel Agent Associations

- **[N.A.N.T.A. / National Associaton of Nigerian Travel Agencies]**

52a Ikorodu Road, Fadeyi
P.O.Box 2665
Yaba
Lagos
Nigeria
Tel: (+234-1) 865365
Tel: (+234-1) 7732876
Fax: (+234-1) 865365
E-Mail: nantanig@yahoo.co.uk

Tour Operator Associations

- **Nigeria Association of Tour Operators (NATOP)**

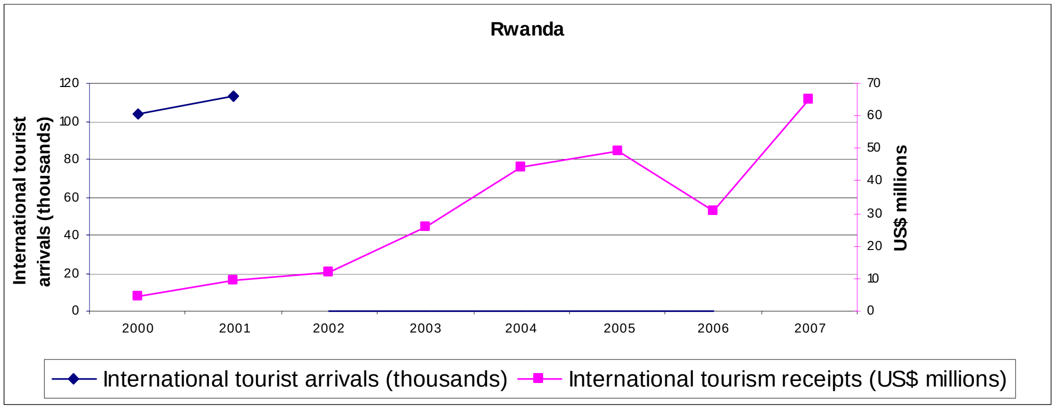
New Millenium Secretariat
Suite 17A, Tafawa Balewa Square
Onikan
P.O.Box 72997
Victoria Island
Lagos
Nigeria
Tel: (+234-1) 2636068
Fax: (+234-1) 2631662
E-Mail: speedav@micro.com.ng
E-Mail: adventuresafrica@yahoo.com

UNWTO AFFILIATE MEMBER

- FEDERATION OF TOURISM ASSOCIATIONS OF NIGERIA

39. Rwanda

Capital: Kigali	
Surface (sq. Kilometres)	26,340
Population (millions), 2007	9.39
Gross domestic product, current prices (USD billions), 2007	3.32
Gross domestic product, constant prices, annual percent change, 2007	6.02
Gross domestic product per capita, current prices, (USD), 2007	353.43
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	898.52
International tourist arrivals, 2007 (thousands)	..
International tourism receipts, 2007 (US$ millions)	65.00



Tourism Associations

- **Rwanda Tours and Travel Association RTTA**

Internet: http://www.rttarwanda.org

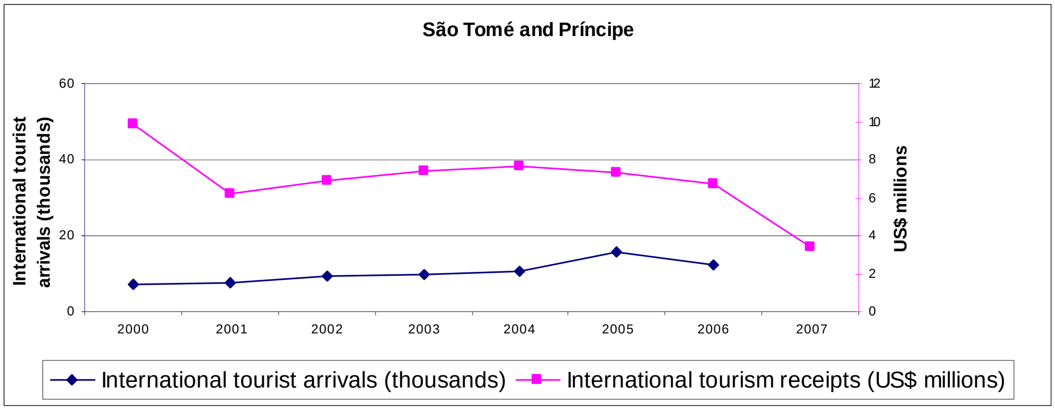
- **Rwanda Chamber of Tourism**

P O Box 319, Kigali Rwanda
Tel +250 583541
Fax: +250 583 574
Email: erusera@hotmail.com
Internet: ct.org.rw

- for more links/information see http://www.bernard-krief.com/espaceinformation/documentation/tourism/Rwanda_Country_Profile.pdf

40. São Tomé and Príncipe

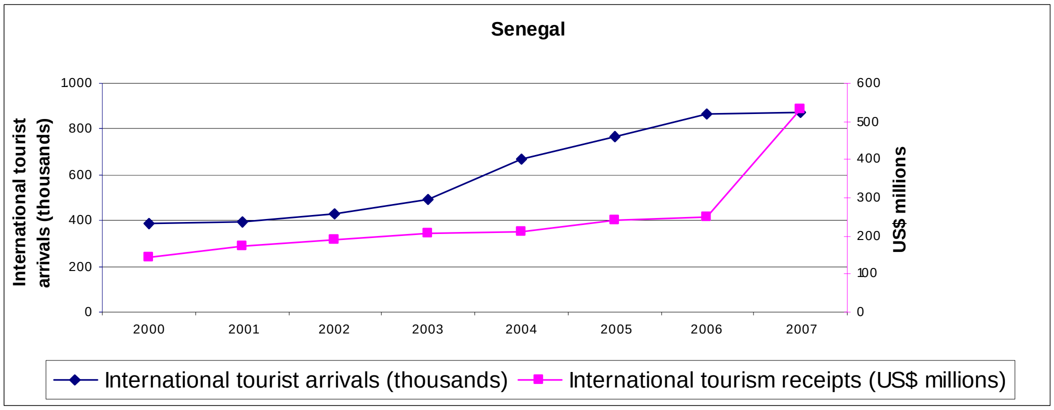
Capital: São Tomé	
Surface (sq. Kilometres)	960
Population (millions), 2007	0.16
Gross domestic product, current prices (USD billions), 2007	0.14
Gross domestic product, constant prices, annual percent change, 2007	6.00
Gross domestic product per capita, current prices, (USD), 2007	880.54
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,565.10
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	3.40



No associations found.

41. Senegal

Capital: Dakar	
Surface (sq. Kilometres)	196,720
Population (millions), 2007	12.23
Gross domestic product, current prices (USD billions), 2007	11.12
Gross domestic product, constant prices, annual percent change, 2007	5.05
Gross domestic product per capita, current prices, (USD), 2007	909.81
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,685.11
International tourist arrivals, 2007 (thousands)	875.00
International tourism receipts, 2007 (US$ millions)	531.29



Tourism Associations

- **SAPCO Société d'Aménagement et de Promotion Touristique de la Petite Côte**

5, Citße Comico
Liberté VI Extension VDN
Dakar
Sénégal
Tel: (+221) 8690888
Fax: (+221) 8672122, 8672111
E-Mail: sapco@orange.sn
Internet: http://www.sapco.sn

Travel Agent Associations

- **Syndicat National des Agences de Voyages et de Tourisme**

c/o SDT Sénégal découverte touristique
B.P. 4159
Dakar
Sénégal
Tel: (+221) 8230340
Fax: (+221) 8211434
E-Mail: sdt@sentoo.sn

Hotel Associations

- **SPIHS / Syndicat Patronal de l'Industrie Hôtelliere au Sénégal**

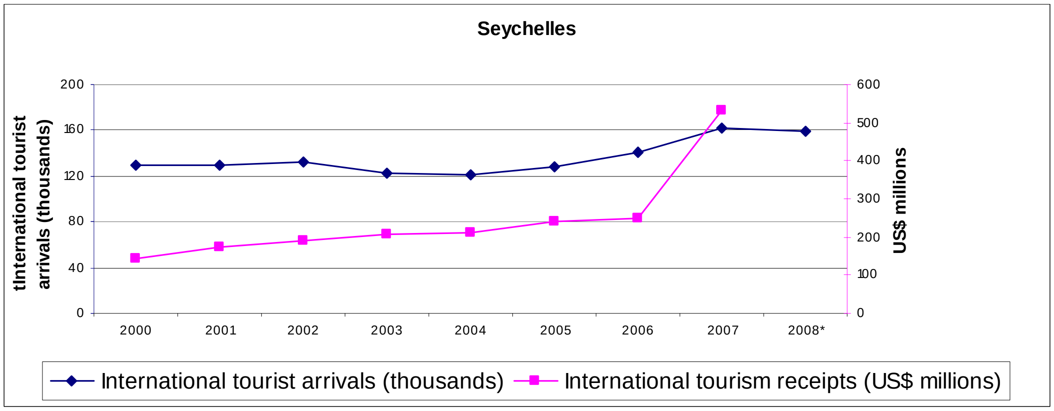
Boîte Postale 232
20 Avenue Albert Sarrault
Dakar
Sénégal
Tel: (+221) 8231947, 8232410
Fax: (+221) 8232655

- **Organisation Nationale pour l'Intégration du Tourisme Sénégalais**

1, Cité Africa, route de Ouakam x Corniche
Dakar
Sénégal
Tel: (+221) 860 42 02
Fax: (+221) 860 42 01
E-Mail: onits2005@yahoo.fr
Internet: http://www.onitsenegal.com

42. Seychelles

Capital: Victoria	
Surface (sq. Kilometres)	460
Population (millions), 2007	0.08
Gross domestic product, current prices (USD billions), 2007	0.71
Gross domestic product, constant prices, annual percent change, 2007	5.27
Gross domestic product per capita, current prices, (USD), 2007	8,580.77
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	16,642.35
International tourist arrivals, 2007 (thousands)	161.27
International tourism receipts, 2007 (US$ millions)	284.70



Tourism Associations

- **Seychelles Association of Airline Operators**

Victoria, Mahé
Seychelles
Tel: (+248) 224910
Fax: (+248) 225596

- **Seychelles Car Hire Operators Association**

Victoria, Mahé
Seychelles
Tel: (+248) 266333, 373589
Fax: (+248) 266441

- **Seychelles Tourist Association**

P.O.Box 459
Victoria, Mahé
Seychelles
Tel: (+248) 324131
Fax: (+248) 324145
E-mail: sta@seychelles.net

Travel Agent Associations

- **Seychelles Tourist Association**

Independence House
P.O.Box 459
Victoria, Mahé
Seychelles
Tel: (+248) 324131
Fax: (+248) 324145
E-Mail: sta@seychelles.net

Tour Operator Associations

- **Association of Independent Tourism Operators**

P.O.Box 384
Victoria, Mahé
Seychelles
Tel: (+248) 344223, 345445
Fax: (+248) 344223
E-Mail: divesey@seychelles.net

Hotel Associations

- **Seychelles Hospitality & Tourism Association SHTA**

c/o Seychelles Tourist Board
Bel Ombre
P.O.Box 1174
Victoria, Mahé
Seychelles
Tel: (+248) 620210
Fax: (+248) 620214
E-Mail: sha@seychelles.net
Internet: http://www.shta-seychelles.com

- **Seychelles Hotels Association**

Premier Building, Room 310
P.O.Box 1174
Victoria, Mahé
Seychelles
Tel: (+248) 225433
Fax: (+248) 324846
E-Mail: sha@seychelles.net
Internet: http://www.the-seychelles.com/sha

- **Seychelles Hoteliers Association**

La Réserve Hotel

Anse Petit Cour
P.O.Box 400
Victoria, Mahé
Seychelles
Tel: (+248) 232211
Fax: (+248) 232166

- **Seychelles Secrets**

Internet: http://www.seychellessecrets.com

- **Small Hotel & Guesthouse Association**

P.O.Box 699
Corner Albert/Market Street
Victoria, Mahé
Seychelles
Tel: (+248) 247331, 322310
Fax: (+248) 247454

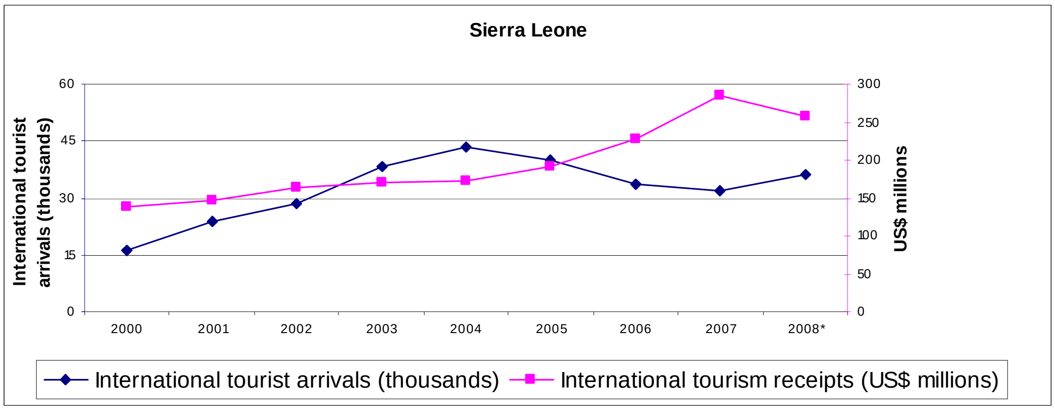
- **COSPROH Compagnie Seychelloise de Promotion Hôtelière Ltd.**

P.O.Box 683
Maison du Peuple
Victoria, Mahé
Seychelles
Tel: (+248) 224694
Fax: (+248) 225291
E-Mail: cosproh@seychelles.net

For more information see http://www.bernard-krief.com/espaceinformation/documentation/tourism/Seychelles_Country_Profile.pdf

43. Sierra Leone

Capital: Freetown	
Surface (sq. Kilometres)	71,740
Population (millions), 2007	5.74
Gross domestic product, current prices (USD billions), 2007	1.66
Gross domestic product, constant prices, annual percent change, 2007	6.85
Gross domestic product per capita, current prices, (USD), 2007	289.94
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	692.12
International tourist arrivals, 2007 (thousands)	32.00
International tourism receipts, 2007 (US$ millions)	22.00



Hotel Associations

- Sierra Leone Hotel & Tourist Association

c/o Hotel Bintumani
Aberdeen Hill
Freetown
Sierra Leone
Tel: (+232-22) 231122, 230479, 272019

44. Somalia

Capital: Mogadishu	
Surface (sq. Kilometres)	637,660
Population (millions), 2007	8.70
Gross domestic product, current prices (USD billions), 2007	
Gross domestic product, constant prices, annual percent change, 2007	
Gross domestic product per capita, current prices, (USD), 2007	
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	
International tourist arrivals, 2007 (thousands)	
International tourism receipts, 2007 (US$ millions)	

No available data of International tourists arrivals and International tourism receipts

Hotel Associations

- **Somali Hotels Association**

c/o Ministry of Tourism & Wildlife
Baidoa
Somalia
Tel: (+252-1) 531266
Fax
E-Mail:
ministryoftourism@somaligovernment.org

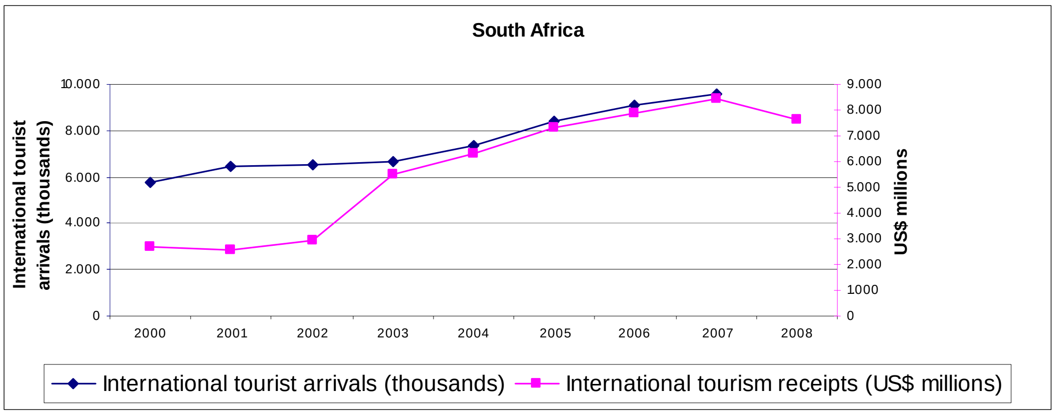
E-Mail: mtourism@somali-gov.info
Internet: http://www.somaligov.net
Internet: http://www.somaligovernment.org

Relevant and relatively recent information on the tourism sector in Somalia can be found at the following link:

For more information **http://www.bernard-krief.com/espaceinformation/documentation/tourism/Somalia_Country_Profile.pdf**

45. South Africa

Capital: Pretoria /Cape Town	
Surface (sq. Kilometres)	1,219,090
Population (millions), 2007	47.85
Gross domestic product, current prices (USD billions), 2007	282.63
Gross domestic product, constant prices, annual percent change, 2007	5.14
Gross domestic product per capita, current prices, (USD), 2007	5,906.49
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	9,761.39
International tourist arrivals, 2007 (thousands)	9,090.88
International tourism receipts, 2007 (US$ millions)	8,418.30



Tourism Associations

- **AFRITOUR / African Tourism Association**

P.O.Box 2554
Johannesburg 2000
South Africa
Tel: (+27-11) 299078/9
Fax: (+27-11) 296305

- **Community Tourism Association of South Africa (CTASA)**

P.O.Box 257
Howick 3290
South Africa
Tel: (+27-33) 3306192

- **EXSA - The Exhibition Association of Southern Africa**

Level 3, Gallagher House
Gallagher Estate, Richards Drive
Midrand
P.O.Box 2632
Halfway House 1685
South Africa
Tel: (+27-11) 8057272
Fax: (+27-11) 8057273
E-Mail: exsa@exsa.co.za
Internet: http://www.exsa.co.za

- **MICE Club**

Johannesburg
South Africa
Tel: (+27-11) 8676007
Fax: (+27-11) 7936293
E-Mail: miceclub@mweb.co.za
Internet: http://www.miceclub.co.za

- **Open Africa**

P.O.Box 44814
Cape Town 7735
South Africa
Tel: (+27-21) 6839639
Fax: (+27-21) 6839639
E-Mail: africandream@openafrica.org
Internet: http://www.openafrica.org
Internet: http://www.africandream.org

- **RETOSA / Regional Tourism Organisation of Southern Africa**

P.O.Box 7381
Halfway House 1685
South Africa
Tel: (+27-11) 3152420
Fax: (+27-11) 3152422
E-Mail: retosa@iafrica.com
Internet: http://www.retosa.co.za
Internet: http://www.retosa.org

- **SAACI / Southern African Association for the Conference Industry**

P.O.Box 414
Kloof 3640
South Africa
Tel: (+27-31) 7646977
Fax: (+27-31) 7646974
E-Mail: sec@saaci.co.za
Internet: http://www.saaci.co.za

- **SAPTO / South African Association of Tourism Marketing Organizations**

Private Bag X 9108
Cape Town 8000
South Africa
Tel: (+27-21) 4216274
Fax: (+27-21) 4194875

- **SITE - The Society of Incentive and Travel Executives Southern Africa**

Cape Town
South Africa
Tel: (+27-21) 7002309
Fax: (+27-21) 7065912
Internet: http://www.site-intt.org

- **South African National Tourism Forum**

P.O.Box 8026
Johannesburg 2000
South Africa
Tel: (+27-11) 3371580/1
Fax: (+27-11) 3373179

- **SAVRALA / South African Vehicle Renting and Leasing Association**

P.O.Box 84623
Greenside 2034
South Africa
Tel: (+27-11) 6462131
Fax: (+27-11) 6465051
E-Mail: financial@amg.co.za
E-Mail: mikek@amg.co.za

- **Tourism Business Council of South Africa (TBCSA)**

P.O.Box 11655
Centurion 0047
South Africa
Tel: (+27-12) 6547525
Fax: (+27-12) 6547394, 6547525
E-Mail: tourism@tbcsa.org.za
Internet: http://www.tbcsa.org.za
(245 End Avenue, Club Vies 0157)

- **Tourism Liaison Council**

75 Maude Street, Sandton
P.O.Box 61326
Marshalltown 2107
South Africa
Tel: (+27-11) 8839103/4
Fax: (+27-11) 8839002

Travel Agent Associations

- **A.S.A.T.A. / Association of Southern African Travel Agents Head Office**

P.O.Box 31742
Braamfontein 2017
South Africa
Tel: (+27-11) 4840828, 4840580, 4870587
Fax: (+27-11) 4840828
E-Mail: general@asata.co.za
Internet: http://www.asata.co.za
(11 Wellington Road, First Floor, Parktown, Johannesburg)

- **A.S.A.T.A. / Association of Southern African Travel Agents Cape Town Branch**

c/o P.O.Box 12402
NI City 7463
South Africa
Tel: (+27-21) 9306444
Fax: (+27-21) 9304162
E-Mail: bulgin@intekom.co.za
Internet: http://www.asat.co.za

- **A.S.A.T.A. / Association of Southern African Travel Agents Durban Branch**

149 Tern Way
Woodhaven
Durban 4006
South Africa
Tel: (+27-31) 4693180
Fax: (+27-31) 4693180
E-Mail: durban@asata.co.za
Internet: http://www.asata.co.za

- **S.A.T.S.A. / South African Tourism Services Association**

P.O.Box 806
Cramerview 2060
South Africa
Tel: (+27-11) 4636559
Fax: (+27-11) 4631790
E-Mail: info@satsa.co.za
E-Mail: satsa@pixie.co.za
E-Mail: admin@satsa.co.za
Internet: http://www.satsa.com
Internet: http://www.satsa.co.za

Tourist Guide Associations

- **South African Association of Registered Tourist Guides**

P.O.Box 25
177 Commercial Road
Pietermaritzburg 3200
South Africa
Tel: (+27-33) 3451348/9
Fax: (+27-33) 3943535

- **Field Guides Association of Southern Africa (FGASA)**

P.O.Box 48557
Roosevelt Park 2129
South Africa
Tel: (+27-11) 7828296
Fax: (+27-11) 7829857
E-Mail: fgasa@iafrica.com
Internet: http://www.fgasa.org.za

Hotel Associations

- **SAHA Southern African Hospitality Association**

P.O.Box 718
Randburg 2125
South Africa
Tel: (+27-11) 7060172, 8862394, 8868007
Fax: (+27-11) 7894811
E-Mail: fedhasa@fedhasa.co.za
Internet: http://www.fedhasa.co.za
(formerly FEDHASA / Federated Hospitality Association of South Africa, 2nd Floor, NBS Building, 310 Oak Avenue, Ferndale)

- **SAHA Southern African Hospitality Association**

P.O.Box 12688
Tygerdal 7462 (Cape Town)
South Africa
Tel: (+27-21) 5951730
Fax: (+27-21) 5952128

- **SAHA Southern African Hospitality Association**

394a Ridge Road
Overport
Durban 4001
South Africa
Tel: (+27-31) 2091025
Fax: (+27-31) 2091059

Youth Hostel Associations

- **Hostelling International South Africa**

P.O.Box 4402
Cape Town 8000
South Africa
Tel: (+27-21) 4242511
Fax: (+27-21) 4244119

E-Mail: info@hisa.org.za
Internet: http://www.hisa.org.za

- **Hostels Association of South Africa**

3rd Floor, St. Georges House
73 St. Georges Mall
Cape Town 8001
South Africa
Tel

- **National Youth Hostel Secretary**

P.O.Box 4402
Cape Town 8000
South Africa
Tel: (+27-21) 4191853
Fax: (+27-21) 4216937
Internet: http://www.hostels.com/za.html

- **YMCA**

P.O.Box 31746
Braamfontein 2001
South Africa
Tel: (+27-11) 4032423

- **YWCA**

P.O.Box 5436
408 Dunwell House
35 Jorissen Street
Braamfontein 2001
South Africa
Tel: (+27-11) 3398212
Fax: (+27-11) 4032423

- **VIP Backpacker Resorts**

P.O.Box 12527
Mill Street 8010
South Africa
Tel: (+27-21) 4380378
Fax: (+27-21) 4380378
E-Mail: info@vipbackpackers.co.za
Internet: http://www.backpackers.com.au

Farm Holiday Information

- **SAFHA / South African Farm Holiday Association**

P.O.Box 247
Durbanville 7550
South Africa
Tel: (+27-21) 969790, 968621
Fax: (+27-21) 961667

- **Stay on a Farm**

P.O.Box 91309
Auckland Park 2006
South Africa
Tel: (+27-11) 4822206/7
Fax: (+27-11) 7266915

Restaurant Associations

- **Catering, Restaurant and Tearoom Association**

P.O.Box 5124
Johannesburg 2000
South Africa
Tel: (+27-11) 3392846
Fax: (+27-11) 3392842

- **Links from the Website:**

http://southafrica.smetoolkit.org/sa/en/content/en/5042/Tourism-associations-and-organisations

- **Association for South African Travel Agents (ASATA)**
- ASATA is a representative forum that promotes professional service with security for both members and their clients. Their emphasis is on free trade without violating rules and regulations. Over 500 travel agents, wholesalers and tour operators are members of ASATA. It also has nearly 200 Associate Partners, which include companies such as airlines, hotels, car rental companies and other suppliers and industry partners.

For more information visit: http://www.asata.co.za/

- **Fair Trade in Tourism South Africa (FTTSA**)
- The FTTSA is an independent project of the World Conservation Union and aims to facilitate improved access to tourism markets for structurally disadvantaged tourism enterprises. Qualifying businesses are able to use the FTTSA Trademark as a marketing tool, as it is an independent symbol of fairness in the tourism industry and is only awarded to establishments that meet stringent criteria.
- The FTTSA also encourages and publicises fair and responsible business practice by South African tourism establishments, such as fair wages and working conditions, fair operations, respect for human rights, culture and the environment. For more information visit: http://www.fairtourismsa.org.za/
- **National Accommodation Association of South Africa (NAA-SA)**
- The NAA-SA brings together all local and provincial accommodation associations. NAA-SA membership assures that those looking for accommodation in smaller establishments can expect quality, reputable service and value for money - and recourse if this is not the case. For more information visit: http://www.naa.co.za/
- **South African Association for the Conference Industry (SAACI)**
- SAACI is dedicated to maintaining and improving the standards of efficiency and professionalism for the conference industry in southern Africa. For more information visit: http://www.saaci.co.za/
- **Southern Africa Tourism Services Association (SATSA)**
- SATSA is a non-profit member driven association, representing major role players including airlines, coach operators, tour operators, accommodation establishments, vehicle-hire companies and so on. By doing business with a SATSA accredited member, one has peace of mind and a guarantee that they are receiving the best possible services within the tourism industry. For more information visit: http://www.satsa.com/
- **South African Tourism (SAT)**
- SAT is the official international marketing organisation for South Africa as a tourist destination. SAT participates in travel shows, presents workshops for members of the travel trade, produces a variety of promotional material and co-ordinates marketing campaigns to create a positive climate for the effective marketing of South Africa's many excellent tourism products. For more information visit: http://www.southafrica.net/
- **Tourism Enterprise Programme (TEP)**
- The TEP is a public-private partnership between the Department of Environmental Affairs and Tourism and the Business Trust. The TEP facilitates the growth of tourism SMMEs, often by establishing links between SMMEs and larger customers. For more information visit: http://www.tep.co.za/
- **Tourism Business Council of South Africa**
- The Tourism Business Council of South

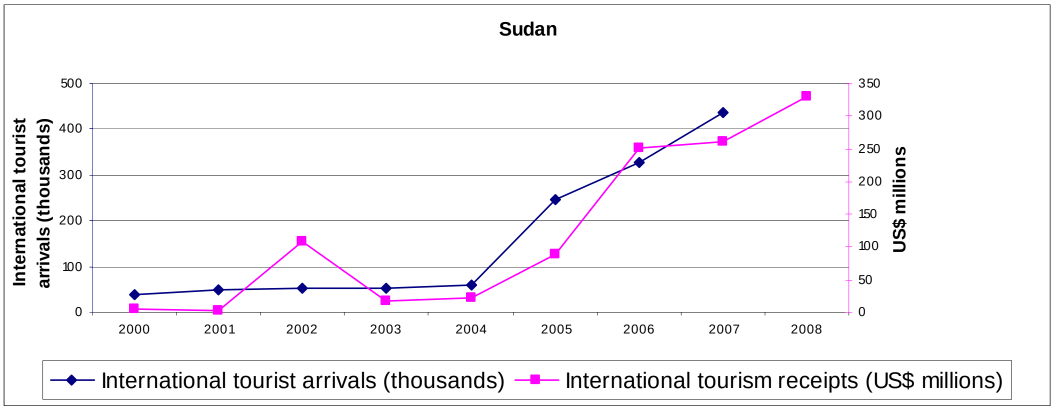
Africa is the umbrella organisation representing the tourism business sector. Its primary purpose is to engage with all stakeholders in developing macro strategies that create an enabling environment for tourism development.

- These strategies require the development and maintenance of an environment in which tourism will prosper and the business sector will be able to achieve successful growth and development, while ensuring the protection of our natural and cultural heritage. For more information visit: http://www.tbcsa.travel/
- **Tourism Grading Council of South Africa (TGCSA)**
- The TGCSA was established to create a star grading system that promotes an overall improvement and standards across all areas of the tourism industry. The TGCSA represents the entire tourism industry and performs a vital role in ensuring a standard of quality is achieved across all the services and facilities offered by the South African tourism industry. For more information visit: http://www.tourismgrading.co.za/
- **Tourism, Hospitality and Sport Education and Training Authority (THETA)**
- THETA is the Sector Education and Training Authority (SETA) established under the Skills Development Act (No 97 of 1998) for the Tourism Hospitality and Sport Economic Sector.
- THETA aims - among other things - to develop the skills of workers in the sector, increase the levels of investment in education and training, encourage employers to train their employees, provide opportunities for work experience and employ new staff in co-operation with the South African Qualifications Authority. For more information visit: http://www.theta.org.za/
- **The Restaurant Association of South Africa (RASA)**
- RASA is a non-profit organisation that was formed in the interest of the South African restaurateur and to ensure that there is a lobby and a voice to speak on his/her behalf. RASA is the information and communications hub that introduces and maintain ethical business and employment practices and introduces compliance to a regulatory framework. For more information visit: http://www.restaurant.org.za/
- **Federated Hospitality Association of South Africa (FEDHASA)**
- The role of FEDHASA is to ensure a sustainable and profitable business environment for the South African Hospitality Industry. In its role as a Trade Association, FEDHASA represents member interests on most recognised public and private sector economic, business and environmental forums.

Close ties with organisations such as South African Tourism, the Tourism Business Council of South Africa, the Department of Environmental Affairs, the Department of Forestry & Water Affairs and many others, ensure member participation and input at the highest possible levels. For more information visit: http://www.fedhasa.co.za/

46. Sudan

Capital: Khartoum	
Surface (sq. Kilometres)	2,505,810
Population (millions), 2007	37.16
Gross domestic product, current prices (USD billions), 2007	46.16
Gross domestic product, constant prices, annual percent change, 2007	10.52
Gross domestic product per capita, current prices, (USD), 2007	1,242.08
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	2,171.87
International tourist arrivals, 2007 (thousands)	436.00
International tourism receipts, 2007 (US$ millions)	261.77



Tourism Associations

- **Sudan Travel Union**

c/o Sudan Chamber of Commerce and Industry
Gamhouria Avenue
P.O.Box 467
Khartoum
Sudan
Tel: (+249-1) 83471761, 83772346, 83780748, 83776518, 83772959
Fax: (+249-1) 83471762, 83780748, 83785790

Hotel Associations

- **Federation of Sudanese Hotels**

P.O.Box 13379
Al Horya Street
Khartoum
Sudan
Tel: (+249-1) 83785790

Tour Operator Associations

- **Sudanese Tour Operator Organization**

P.O.Box 3202
Khartoum
Sudan
Tel: (+249-1) 83776946, 83776949

Youth Hostel Associations

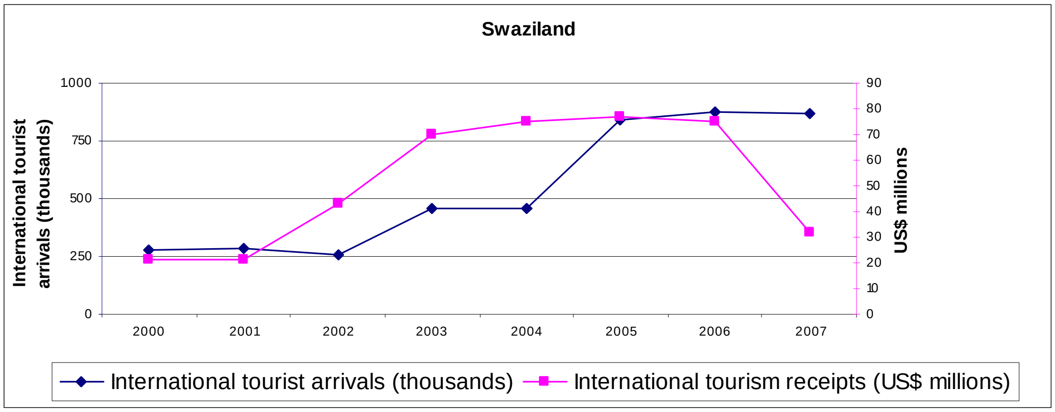
- **Sudanese Youth Hostel Association**

House 66, Street 47, East-Kartoum
P.O.Box 1705
Khartoum
Sudan
Tel: (+249-1) 83775831/2

For more information http://www.bernard-krief.com/espaceinformation/documentation/tourism/Sudan_Country_Profile.pdf

47. Swaziland

Capital: Mbabane / Lobamba	
Surface (sq. Kilometres)	17,360
Population (millions), 2007	1.16
Gross domestic product, current prices (USD billions), 2007	2.94
Gross domestic product, constant prices, annual percent change, 2007	2.37
Gross domestic product per capita, current prices, (USD), 2007	2,523.05
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	4,835.52
International tourist arrivals, 2007 (thousands)	869.68
International tourism receipts, 2007 (US$ millions)	32.00



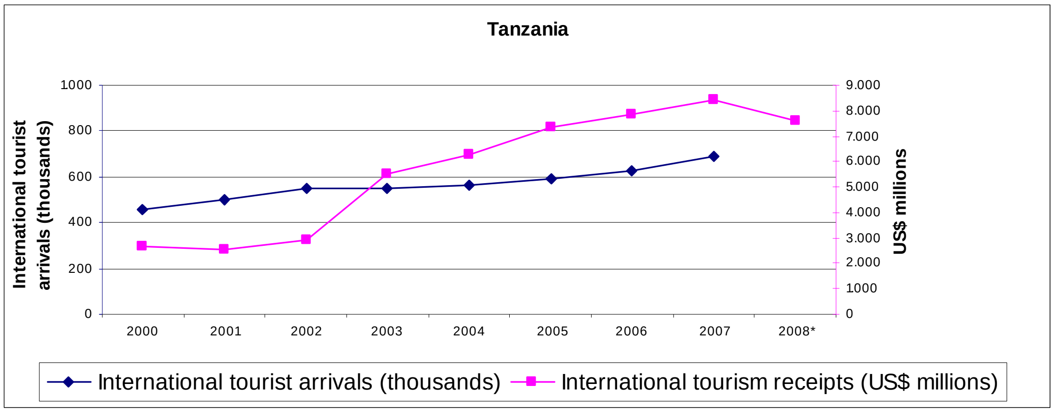
Hotel Associations

- **Hotel & Tourism Association of Swaziland**

P.O.Box 462
Mbabane
Swaziland
Tel: (+268) 4042218
Fax: (+268) 4044516
Internet: http://www.swazi.com/hotels

48. Tanzania

Capital: Dar es Salaam	
Surface (sq. Kilometres)	94,730
Population (millions), 2007	38.96
Gross domestic product, current prices (USD billions), 2007	16.18
Gross domestic product, constant prices, annual percent change, 2007	7.27
Gross domestic product per capita, current prices, (USD), 2007	415.36
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,255.96
International tourist arrivals, 2007 (thousands)	692.00
International tourism receipts, 2007 (US$ millions)	1,198.80



Tourism Associations

- **All Africa Travel & Tourism Association (AATTA)**

P.O.Box 6341
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2112345

- **Intra-African Tourism and Travel Association (ITTA)**

Dar-es-Salaam
Tanzania
Tel: (+255-22) 2124263
Tel: (+255-754) 368677
Fax
E-Mail: info@itta.org
Internet: http://www.itta.org

- **Tourism Confederation of Tanzania (TCT)**

5th Floor, Osman Towers
Zanaki Street
P.O.Box 13837
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2136177
Fax
E-Mail: tct@cats-net.com
Internet: http://www.tct.co.tz
Internet: http://www.tourismdonfederation.co.tz

- **Zanzibar Association of Tourism Investors**

P.O.Box 2578
Zanzibar
Tanzania
Tel: (+255-24) 2232378
Tel: (+255-747) 475065 cell.
Fax
E-Mail: info@zati.org
Internet: http://www.zati.org

Tour Guides Association

- **Tanzania Tour Guides Association TTGA**

Arusha
Tanzania
Tel: (+255-713) 338411 cell.
Fax
Internet: http://www.ttga.or.tz

Travel Agent Associations

- **Tanzania Society of Travel Agents (TASOTA)**

P.O.Box 1947 + 2485
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2115381
Fax: (+255-22) 2112786
E-Mail: chairman@tasota.org
Internet: http://www.tasota.org

Tour Operator Associations

- **Tanzania Association of Tour Operators (TATO)**

AICC, Serengeti Block, Room 435
P.O.Box 6162
Arusha
Tanzania
Tel: (+255-27) 2504188, 2506430

Tel: (+255-713) 512308 cell.
Fax: (+255-27) 2504188, 2506430
E-Mail: tato@cybernet.co.tz
Internet: http://www.tatotz.org

- **Tanzania Air Operators Association (TAOA)**

Dar-es-Salaam
Tanzania
Tel: (+255-713) 320812 cell.

- **Tanzania Hunting Operators Association (TAHOA)**

P.O.Box 33407
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2666174

Hotel Associations

- **Hotel Association of Tanzania (HAT)**

P.O.Box 32052
Red Cross Building
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2125022
Tel: (+255-750) 316866 cell.
Fax
E-Mail: hatezsecretary@gmail.com
Internet: http://www.hotelstanzania.com

- **Hotel Keepers' Association of Tanzania (HKAT)**

P.O.Box 70201
Dar-es-Salaam
Tanzania
Tel: (+255-741) 323163

- **Tanzania Hotels Investment Ltd**

Moshi Road
P.O.Box 877
Arusha
Tanzania
Tel: (+255-27) 2502711/2
Fax: (+255-27) 2508221

Youth Hostel Associations

- **YMCA-Hostels of Tanzania**

P.O.Box 4299
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2135457

- **YWCA Hostels of Tanzania**

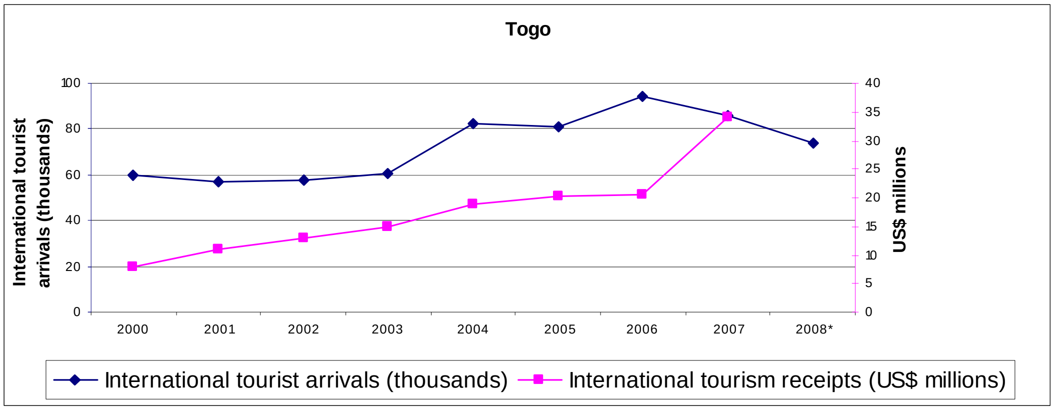
P.O.Box 2086
Dar-es-Salaam
Tanzania
Tel: (+255-22) 2122439

- **For more information/links see**

http://www.bernard-krief.com/espaceinformation/documentation/tourism/Tanzania_Country_Profile.pdf

49. Togo

Capital: Lomé	
Surface (sq. Kilometres)	56,790
Population (millions), 2007	6.46
Gross domestic product, current prices (USD billions), 2007	2.50
Gross domestic product, constant prices, annual percent change, 2007	2.10
Gross domestic product per capita, current prices, (USD), 2007	386.52
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	806.02
International tourist arrivals, 2007 (thousands)	86.00
International tourism receipts, 2007 (US$ millions)	34.15

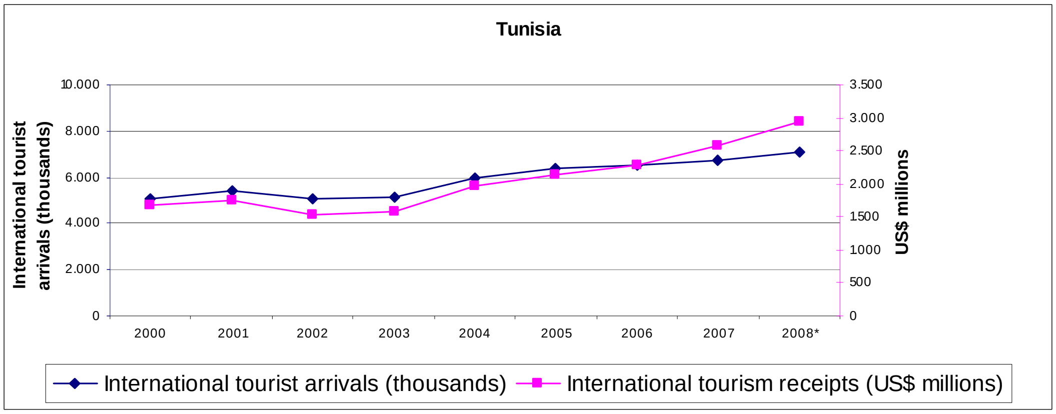


Hotel Associations

- ASHORESTO Association des Hôteliers et Restaurateurs du Togo
Boîte Postale 2206
Lomé
Togo
Tel: (+228) 2265169
Fax
E-Mail: cabe@togoimet.com

50. Tunisia

Capital: Tunis	
Surface (sq. Kilometres)	163,600
Population (millions), 2007	10.30
Gross domestic product, current prices (USD billions), 2007	35.01
Gross domestic product, constant prices, annual percent change, 2007	6.33
Gross domestic product per capita, current prices, (USD), 2007	3,397.63
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	7,472.56
International tourist arrivals, 2007 (thousands)	6,761.91
International tourism receipts, 2007 (US$ millions)	2,575.08



Tourism Associations

- **Société de Développement Touristique**

21 Avenue Bourguiba
1001 Tunis
Tunisia
Tel: (+216) 71259477, 71249393

- **Société tunisienne de promotion et d'animation touristique ST-PAT**

10, rue Pierre de Coubertin
1000 Tunis
Tunisia
Tel: (+216) 71331526
Fax: (+216) -71332659
E-Mail: discover@st-pat.com
Internet: http://www.st-pat.com

Youth Hostel Associations

- **Association Tunisienne des Auberges de Jeunesse (ATAJ)**

Boîte Postale 320
10 Rue Ali Bach Hamba
1015 Tunis
Tunisia
Tel: (+216) 71353277
Fax: (+216) 71352172

Travel Agent Associations

- **FTAV / Fédération Tunisiénne des Agences de Voyages**

3/5 Rue de la Monnaie
1001 Tunis
Tunisia
Tel: (+216) 71340499
Fax: (+216) 71341818

Hotel Associations

- **FTH / Fédération Tunesiénne de l'Hôtellerie**

62, Rue d'Iran
1001 Tunis
Tunisia
Tel: (+216) 71847200
Fax: (+216) 71791281
E-Mail: info@fth.com.tn
Internet: http://www.fth.com.tn

- **Fédération Régionale de l'Hôtellerie du Sud-Est 'Ile de Djerba'**

6, Rue Safriel Side Youssef
4180 Jerba
Tunisia
Tel: (+216) 75758736, 75758737
Fax: (+216) 75757821, 75758743

-

- **Fédération Régionale de l'Hôtellerie du Monastir**

Hôtel Ruspina
5000 Monastir
Tunisia
Tel: (+216) 73521360/1, 73520360/3
Fax: (+216) 73521364

- **Fédération Régionale de l'Hôtellerie du Cap Bon**

Hotel Shalimar
8050 Hammamet

Tunisia
Tel: (+216) 72226960
Fax: (+216) 72227251, 72227560

- **Fédération Régionale de l'Hôtellerie du Centre**

Hotel International Marhaba
4039 Sousse
Tunisia
Tel: (+216) 73243633/-9
Fax: (+216) 73243639

- **Fédération Régionale de l'Hôtellerie du Nefta**

Hotel Sahara Palace
2240 Nefta
Tunisia
Tel: (+216) 7657046/7

- **Fédération Régionale de l'Hôtellerie du Sud-Ouest**

c/o Mehari Voyages
8, Rue Imam Sahnoun
1002 Tunis-Belvédère
Tunisia
Tel: (+216) 71289347, 71285316, 71785228
Fax: (+216) 71783060

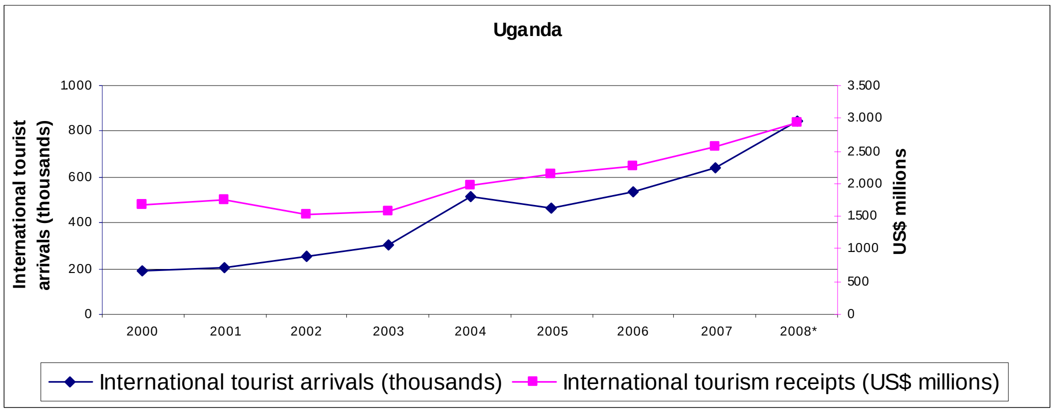
- **Fédération Régionale de l'Hôtellerie du Nord**

Hotel Rihana
8130 Ain Draham
Tunisia
Tel: (+216) 78647391/-4
Fax: (+216) 78647396

- **UNWTO Affiliate Member**
- FÉDÉRATION TUNISIENNE HÔTELLERIE

51. Uganda

Capital: Kampala	
Surface (sq. Kilometres)	241,040
Population (millions), 2007	30.93
Gross domestic product, current prices (USD billions), 2007	11.23
Gross domestic product, constant prices, annual percent change, 2007	6.50
Gross domestic product per capita, current prices, (USD), 2007	363.01
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	938.83
International tourist arrivals, 2007 (thousands)	642.00
International tourism receipts, 2007 (US$ millions)	398.26



Tourism Associations

- **Skal International**

Kampala Chapter, No 611
P.O.Box 7734
Kampala
Tel: (+256-78) 2807779
Fax: (+256-41) 2510856
E-Mail: ecgoossens@hotmail.com

- **The Travel Group**

P.O.Box 7743/7711
Kampala
Uganda
Tel: (+256-71) 2717000
Fax: (+256-41) 2266398
E-Mail: ttg@imul.com
E-Mail: thetravelgroup@gmail.com
(consulting, representations, project developments)

- **The Uganda Community Tourism Association (UCOTA)**

P.O.Box 27159
Kampala
Uganda
Tel: (+256-41) 2230805
Fax
E-Mail: ucota@swiftuganda.com
E-Mail: ucota@africaonline.co.ug
Internet: http://www.ucota.or.ug

- **Uganda Sustainable Tourism Development Programme**

P.O.Box 21957
Kampala
Uganda
Tel: (+256-41) 2252966
Fax: (+256-41) 2252966
E-Mail: stanley@ugstdp.or.ug

- **Uganda Tourism Association (UTA)**

P.O.Box 24503
Kampala
Uganda
Tel: (+256-78) 2807779
Fax: (+256-41) 2510856
E-Mail: ugandatourismassociation@gmail.com
Internet: http://www.uta.or.ug
(Plot 31, Kanjokya Street, Kamwokya, Kampala)

Travel Agent Associations

- **The Uganda Association of Travel Agents (TUGATA)**

P.O.Box 5619
Kampala
Uganda
Tel: (+256-41) 2230151, 2232555, 2232666, 2232777
Fax: (+256-41) 2236998
E-Mail: utbtours@starcom.co.ug

Tour Operator Associations

- **Association of Uganda Tour Operators (AUTO)**

P.O.Box 11060
Kampala
Uganda
Tel: (+256-41) 2321552, 2320152
Fax: (+256-41) 2321552, 2320152
E-Mail: mantana@infocom.co.ug

E-Mail: auto@utlonline.co.ug

Hotel Associations

- **Hotels and Catering Association of Uganda**

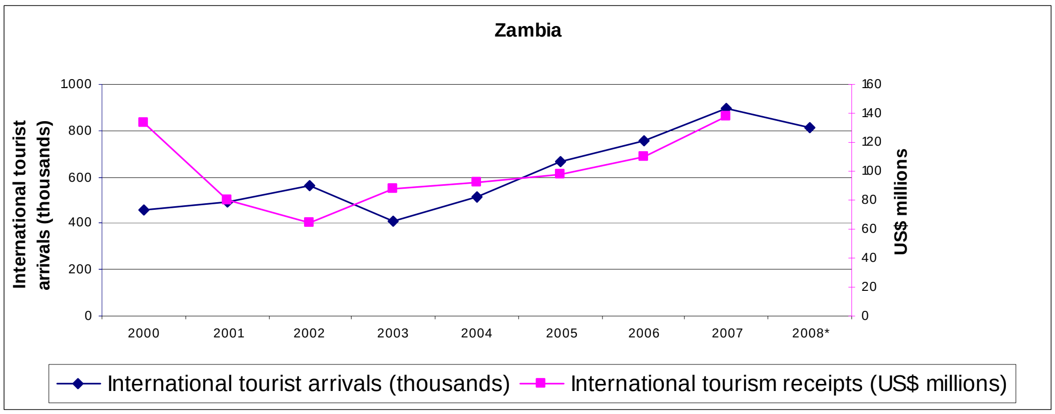
c/o Sheraton Kampala Hotel
Ternan Avenue
P.O.Box 7041
Kampala
Uganda
Tel: (+256-41) 2344591/6, 2344590
Fax: (+256-41) 2256696
E-Mail: sales_kampala@sheraton.com

Relevant and relatively recent information on the tourism sector in Uganda can be found at the following link:

http://www.bernard-krief.com/espaceinformation/documentation/tourism/Uganda_Country_Profile.pdf

52. Zambia

Capital: Lusaka	
Surface (sq. Kilometres)	752,610
Population (millions), 2007	12.16
Gross domestic product, current prices (USD billions), 2007	11.16
Gross domestic product, constant prices, annual percent change, 2007	5.26
Gross domestic product per capita, current prices, (USD), 2007	917.60
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	1,309.21
International tourist arrivals, 2007 (thousands)	897.00
International tourism receipts, 2007 (US$ millions)	138.00



Tourism Associations

- **Africa Travel Association (ATA) Zambian Branch**
P.O.Box 30815
Lusaka
Zambia
Tel: (+260-211) 251734
Fax: (+260-211) 252779

- **Airline Owners & Operators Association (AOOA)**
Lusaka
Zambia
Tel: (+260-211) 229261

- **Board of Airlines Representatives (BAR)**
P.O.Box 34150
Lusaka
Zambia
Tel: (+260-211) 264357
Tel: (+260) 97794506
Fax: (+260-211) 254064
E-Mail: gm.proflightconnect.zm

- **Car Hire Association of Zambia (CHAZ)**
Lusaka
Zambia
Tel

Hotel Associations

- **Hotel and Catering Association of Zambia (HCAZ)**
P.O.Box 30815
Lusaka
Zambia
Tel: (+260-211) 251734
Fax: (+260-211) 252779

- **Zambia Hotels Board**
P.O.Box 30575
Lusaka
Zambia
Tel: (+260-211) 227645
Fax: (+260-211) 222189

Farm Holiday Information

Zambia National Farmers Union
P.O.Box 30395
Lusaka
Zambia
Tel: (+260-211) 223222, 222797, 254035
Fax: (+260-211) 222736

Travel Agent Associations

- **The Travel Agents Association of Zambia (TAAZ)**
c/o Voyagers Travel & Tours
Show Grounds
Great East Road
P.O.Box 37609
Lusaka
Zambia
Tel: (+260-211) 220647
Fax
E-Mail: bimm@microlink.zm

Tour Operator Associations

- **Tour Operators Association of Zambia (TOAZ)**

P.O.Box 30946
Lusaka
Zambia
Tel: (+260-211) 751302
Fax
E-Mail: rshenton@zamnet.zm

- **Lower Zambezi Operator's Association (LZOA)**

P.O.Box 50299
Lusaka
Zambia
Tel: (+260-211) 212597
Fax
E-Mail: clzinfo@iwayafrica.com

- **Luangwa Safari Association**

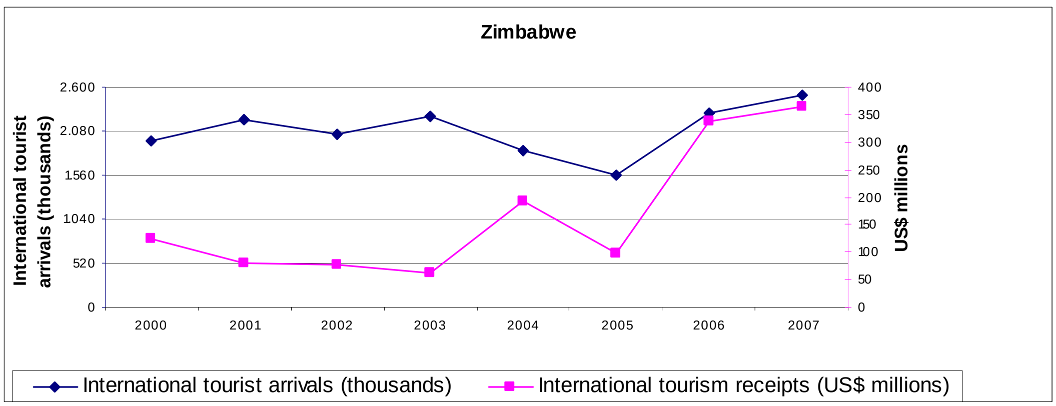
c/o Flatdogs Camp
P.O.Box 125
Mfuwe
Zambia
Tel: (+260-216) 246038
Fax
E-Mail: ade@flatdogscamp.com

- **Safari Hunters Outfitters Association of Zambia (SHOAZ)**

c/o Ashys Service Stadion
Cairo Road
Lusaka
Zambia
Tel: (+260-211) 224672
Fax
E-Mail: hunters@zamnet.zm

53. Zimbabwe

Capital: Harare	
Surface (sq. Kilometres)	390,370
Population (millions), 2007	11.73
Gross domestic product, current prices (USD billions), 2007	0.64
Gross domestic product, constant prices, annual percent change, 2007	-6.09
Gross domestic product per capita, current prices, (USD), 2007	54.62
Gross domestic product based on purchasing-power-parity (PPP) per capita GDP, (USD), 2007	188.43
International tourist arrivals, 2007 (thousands)	2,508.00
International tourism receipts, 2007 (US$ millions)	365.00



Tourism Associations

- **Zimbabwe Council for Tourism (ZCT)**

P.O.Box HG 306 + 7240
9th Floor, Travel Center
Kwame Nkrumah Avenue
Harare
Zimbabwe
Tel: (+263-4) 794016, 708822, 708836, 708878/9, 700521
Fax: (+263-4) 794015
E-Mail: chiefexec@zct.co.zw

- **Board of Airline Representatives (BAR)**

P.O.Box 7240
Harare
Zimbabwe
Tel: (+263-4) 708822
Fax: (+263-4) 702484

- **Boat Owners Association of Zimbabwe (BOAZ)**

Private Bag 649 E
Harare
Zimbabwe
Tel: (+263-4) 614162/7
Fax: (+263-4) 614161

- **Zimbabwe Vehicle Renting Association (ZIVRA)**

P.O.Box 7240
Harare
Zimbabwe
Tel: (+263-4) 701849, 701858
Fax: (+263-4) 701880/1

Hotel Associations

- **Hospitality Association of Zimbabwe (HAZ)**

P.O.Box CY 398
Causeway
Harare
Zimbabwe
Tel: (+263-4) 733211, 708872
Fax: (+263-4) 708872
E-Mail: hazceaz@internet.co.zw

Travel Agent Associations

- **AZTA / Association of Zimbabwe Travel Agents**

P.O.Box 7240
Harare
Zimbabwe
Tel: (+263-4) 708822, 708836, 708878/9
Fax: (+263-4) 702484
E-Mail: letwin@zct.co.zw

Tour Operator Associations

- **ZATSO / Zimbabwe Association of Tour and Safari Operators**

P.O.Box 7240
Harare
Zimbabwe
Tel: (+263-4) 708878/9
Fax: (+263-4) 702484
E-Mail: pangeti@zct.co.zw
E-Mail: bown@zct.co.zw

- **Inbound Tour Operators of Zimbabwe**

Association (ITOZA)
P.O.Box 7240
Harare
Zimbabwe
Tel: (+263-4) 708878/9
Fax: (+263-4) 794015, 702484
E-Mail: pangeti@zct.co.zw

Youth Hostel Associations

- **Youth Hostel Association of Zimbabwe**

P.O.Box 8521
Causeway
Harare
Zimbabwe
Tel: (+263-4) 796436

- **UNWTO Affiliates Members**

- FÉDÉRATION INTER-ETATS DES SYNDICATS DES AGENCES DE VOYAGES ET DE TOURISME DE L'AFRIQUE DE L'OUEST ET DU CENTRE

FIELDS OF ACTIVITIES Professional associations
REGION Africa
COUNTRY Cameroon
Type of Business / Activity: Privé / A but lucratif / Conseil du tourisme / Régional
UNWTO Membership since: 2007
Telephone: 237342 20 62
Fax: 237342 65 20
Email: emmanuel_ngassa@yahoo.fr
Web:

- FÉDÉRATION NATIONALE DES AGENCES DE VOYAGES DU MAROC

FIELDS OF ACTIVITIES Travel agencies
REGION Africa
COUNTRY Morocco
UNWTO Membership since: 1995
Address
10, Rue Eloraibi Jilali (ex Rue de Foucauld)
,Casablanca
Telephone: 212-2226 03 00
Fax: 212-2227 79 63

- FEDERATION OF **TOURISM ASSOCIATIONS** OF NIGERIA

FIELDS OF ACTIVITIES Professional associations
REGION Africa
COUNTRY Nigeria
COUNCIL Business Council
Type of Business / Activity: Private / Non-profit / National
UNWTO Membership since: 2007
Address
Eunibrown House, 3rd floor, 195 Ikorodu Road
,Palm Grove, Lagos
Telephone: 234-1803 532 1111
Fax: 234-1555

- FÉDÉRATION TUNISIENNE D'HÔTELLERIE

FIELDS OF ACTIVITIES Accommodation
REGION Africa
COUNTRY Tunisia
COUNCIL Business Council
Type of Business / Activity: Privé / A but non lucratif / National
UNWTO Membership since: 2008
Address
62, rue d'Iran 1002
BP61,Tunis Belvédère
Telephone: 216-71847 200
Fax: 216-71785 379

- WEST AFRICA TOURISM UNION (WATU)

FIELDS OF ACTIVITIES Destination Management Organization
REGION Africa
COUNTRY Ghana
COUNCIL Destination Council
Type of Business / Activity: Private / for-profit / international
UNWTO Membership since: 2007
Address
P.O. Box 7702
Accra North
Telephone: 233-21244 261 435
Fax: 233-21248 709
Email: nabonsu@africaonline.com.gh
Web: