



UNLOCKING  
OPPORTUNITIES FOR  
TRAVEL & TOURISM  
GROWTH IN AFRICA

In partnership with:



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# FOREWORD

**At the turn of the millennium, Africa's Travel & Tourism sector was worth US\$75 billion. In two decades, that number has more than doubled.** 84 million travellers made their way to the continent in 2019, adding around US\$186 billion to Africa's GDP – roughly 7% of the region's economy.

This remarkable growth has created not thousands, but millions of new jobs. In 2000, travel employed 12.3 million people across the continent. In 2019, prior to the COVID-19 pandemic, it was 25 million.

Africa's share of the global market has grown, too. In 2000, just 5% of the world's Travel & Tourism jobs were in Africa. Today, it's 7.4% and rising. Over the next decade, the sector is forecast to grow 5.1% every year – almost twice as fast as the wider economy. This activity will create 12.7 million more jobs on the continent by 2033, bringing employment to less developed and more remote areas.

This is the story of a continent transformed. The journey has not been smooth – the financial crisis of 2008 and the COVID-19 pandemic were catastrophic for Travel & Tourism. In some African countries these challenges have been combined with other challenges such as Ebola outbreaks, political instability, and natural disasters. Despite everything, years of investment are now paying dividends. Since 2000, capital flowing into Africa's Travel & Tourism sector has outpaced the global average and has more than tripled in two decades. City skylines brim with new hotels, restaurants, and offices. The arteries of travel – new roads, runways, and airports – are becoming the catalysts for enterprise, private investment, and growing supply chains.

The challenge, now, is to make sure this growth is sustainable. As well as being uniquely placed to expand Travel & Tourism, Africa is disproportionately vulnerable to resource scarcity, drought, and climate shocks. Millions come to see the continent's endangered wildlife each year and this wildlife must be protected. Wealth must be spread evenly, ensuring employment reaches the communities who need it most.

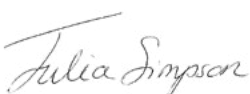
But if we get it right, the opportunity is historic. Africa has a demographic advantage – its population is young, working age, and rapidly expanding. With this growth comes a new middle class – more families who now have the freedom to travel, increasing the investment opportunity further still. If African countries implement policies to improve visa facilitation across the continent, its air infrastructure and auxiliary tourism marketing activity for Africa, the region's Travel & Tourism sector could contribute an extra US\$50 billion in GDP and 6 million new jobs.

Another big cause for optimism is the energy opportunity. Africa has an abundance of low-carbon resources, with pockets of solar and geothermal power. Kenya, in East Africa, has already doubled its share of low-carbon energy from 7.5% in 2010 to 19.8% in 2019 – the largest increase of any country, worldwide. This is a model to others, and perhaps the surest sign yet that the net zero transition and economic growth do not come at the expense of each another. Instead, they can work hand-in-hand.

Finally, to anyone reading this who has yet to visit Africa: do not miss out. This is a region blessed with breathtaking natural beauty and some of the most precious wildlife on earth. It is home to Victoria Falls, Mount Kilimanjaro, the dunes of the Sahara and the pyramids of Giza. You will also find the lush Congo forests, the white beaches of Cabo Verde or Madagascar and the bustling metropolises of Cape Town, Nairobi, Lagos, and Kigali. And what truly distinguishes the continent, above all, is its people.

I would like to acknowledge VFS Global for their collaborative input, along with all our contributors whose expertise has significantly enriched the content of this report.

I hope you enjoy the report, and that it inspires you to continue to explore this remarkable continent or perhaps visit it for the first time. I also hope it interests you in the massive investment opportunity the countries on the continent provide. It is truly a continent of promise.



**Julia Simpson**  
President & CEO  
World Travel & Tourism Council



# 1. EXECUTIVE SUMMARY

- In 2022, Travel & Tourism’s contribution to Africa’s GDP reached US\$168 billion, representing 5.9% of the regional economy. It remained 9.7% below its pre-pandemic level in 2019.
- In the same year, the sector supported nearly 22 million jobs across the continent and was short of its 2019 level by 12.7%.
- Seychelles was the country most reliant on Travel & Tourism, as the sector’s contribution accounted for nearly 53% of the country’s GDP in 2019. Seychelles was followed by Mauritius and Cabo Verde.
- These three countries also derived the highest shares of their Travel & Tourism revenues from international visitors.
- Between 2000 and 2019, investment into Africa’s Travel & Tourism increased by three and half times, compared to doubling at the global level.
- According to the current trajectory, in the next decade, 2023 to 2033, Travel & Tourism’s contribution to the African economy is set to rise at an annual rate of 5.1% - faster than the 3.1% annual increase projected for the wider regional economy. In the same period, the sector is forecast to create 12.7 million new jobs.
- The 1.3% annual increase in greenhouse gas emissions by Africa’s Travel & Tourism sector between 2010 and 2019 isn’t just slower than the global average rate of 2.5% per year but also slower than the 2.7% annual expansion in the sector’s contribution to the regional economy. This suggests a decoupling of the sector’s growth from its emissions.
- The sector’s greenhouse gas intensity in Africa, which measures its rate of emissions per unit of economic contribution, fell from 1.44 kg of CO<sub>2</sub> per dollar in 2010 to 1.28 kg of CO<sub>2</sub> per dollar in 2019.
- Although Africa’s Travel & Tourism sector only accounted for 0.6% of the total water used by the global sector in 2019, 57% of it was sourced from areas classified to be “high” or “extremely high” water stress.
- A scenario analysis of the implementation of a policy package aimed at improving enabling environment and air infrastructure, adopting best practice for visa facilitation, and increasing marketing for Africa as a destination revealed that by 2033, Travel & Tourism would benefit from an additional US\$50 billion over the current trajectory and 6 million additional new jobs would be created.

**2022**

**us\$168bn**  
Travel & Tourism  
total contribution to  
Africa GDP

**22mn**  
Travel & Tourism Jobs

**Top Performers**  
T&T contribution to GDP  
in Africa (2019)

<b>1. Egypt</b>	<b>US\$ 31.5 BN</b>
<b>2. South Africa</b>	<b>US\$ 31.3 BN</b>
<b>3. Nigeria</b>	<b>US\$ 20.4 BN</b>
<b>4. Morocco</b>	<b>US\$ 14.6 BN</b>



## 2. INTRODUCTION

**With a population of over 1.4 billion<sup>1</sup> people and countless breathtaking landscapes, Africa is home to some of the most inspiring Travel & Tourism experiences on Earth.** Across 54 diverse countries, African Travel & Tourism caters to every type of traveller, with destinations ranging from pristine beaches and awe-inspiring safaris to fascinating historical sites and dynamic cultures.

It's no wonder, then, that **84 million overnight international travellers** made their way to the world's second largest continent in 2019. Prior to the disruptions of COVID-19, the African Travel & Tourism sector supported **25 million jobs** and contributed over **US \$186 billion to GDP**, representing 7% of the regional economy.

This report from the World Travel & Tourism Council (WTTC) reveals the full economic impact that the sector brings, and is forecast to bring, to Africa, based on WTTC's Economic Impact Research (EIR). It also highlights the environmental and social impact of Travel & Tourism in the region, based on Environmental and Social Research (ESR), which is a joint project between WTTC and the Ministry of Tourism of Saudi Arabia-incubated Sustainable Tourism Global Center (STGC), produced in partnership with Oxford Economics.

The continent faces a number of challenges – some unique to the continent and others that are seen in other key regions. The public and private sectors have a number of opportunities and ways in which to address these challenges to ensure the African Travel & Tourism sector continues to grow sustainably and inclusively.

While this report outlines some key challenges, such as connectivity, social and environmental sustainability and misconceptions, it also highlights some possible solutions to address these challenges. These solutions include upgrades to infrastructure, investments in the development and exchange of skills and the implementation of strategic marketing initiatives. Should these challenges be addressed, the African Travel & Tourism sector could see a significant increase in its contribution to GDP and the creation of new jobs.

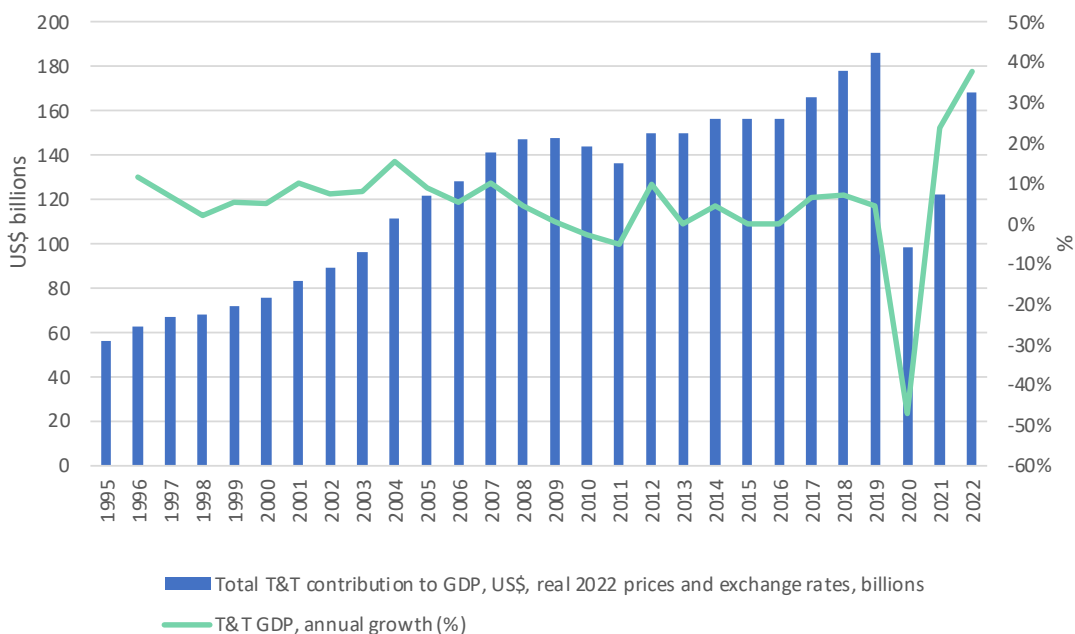
With the implementation of three key strategies around infrastructure, visas, and marketing, the African Travel & Tourism sector could see an increase of US\$50 billion in Travel & Tourism GDP over the baseline forecast and the creation of 6 million additional new jobs by 2033.



# 3. ECONOMIC OUTLOOK

In just 19 years, the sector’s total contribution to the African economy has more than doubled. In 2000, Travel & Tourism’s total contribution to Africa’s economy was US \$75.5 billion (6% of the regional economy) and the sector supported 12.3 million jobs (4.5% of all jobs) across the continent. The sector enjoyed a period of continuous growth until the global financial crisis hit in 2008/2009. Then in 2010 and 2011, it contracted by 2.6% and 5.2% respectively, before rebounding by 9.9% in 2012.

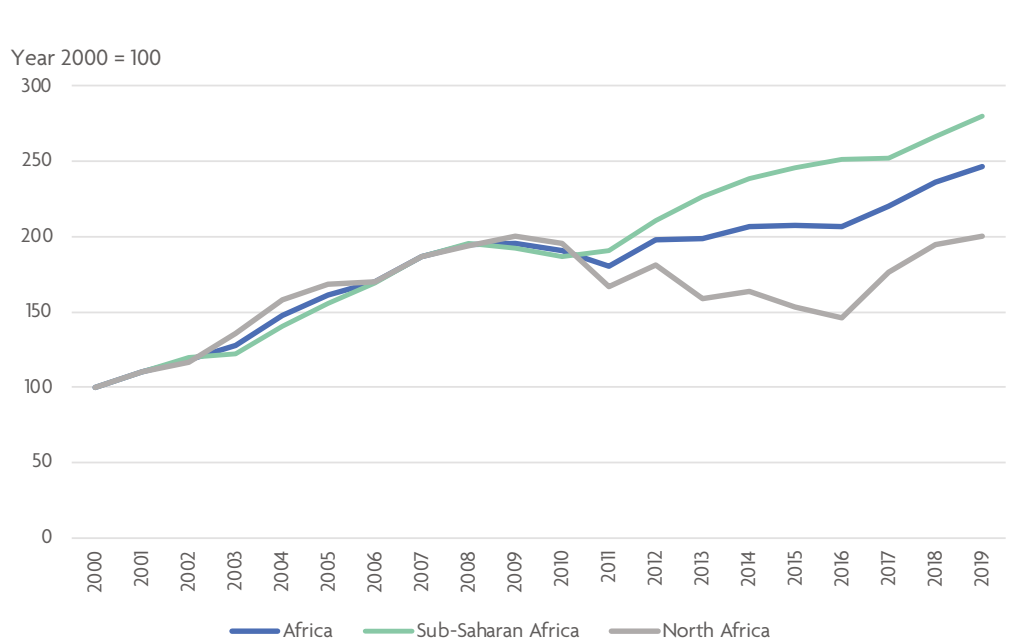
Figure 1: Africa - Total Travel & Tourism contribution to GDP, 1995 - 2022



Despite this bounce back in 2012, Travel & Tourism in Africa failed to maintain any sustained period of growth in the 2010s. Slow economic growth, disease outbreaks, political instability, and a lack of government support for Travel & Tourism all held the sector back from achieving the vast potential afforded by its magnificent natural environments and rich cultures. The deadly Ebola outbreak in Guinea, Sierra Leone, and Liberia between 2014 and 2016 was an especially damaging setback, while the adverse effects on bookings and spending spread to other West African countries and as far away as Kenya in East Africa.

Travel & Tourism's growth in North Africa and Sub-Saharan Africa followed a similar trend in the 2000s. In the first half of the 2010s, however, the sub-regions diverged, with Sub-Saharan Africa resuming its upward trajectory while the sector in North Africa entered a period of gradual downturn (see Figure 2). The political instability which followed the 2011 Arab Spring and ensuing civil wars across the Middle East and North Africa had a lasting negative effect on visitor numbers. Analysis of 90 different crisis events across the globe and their economic impact on Travel & Tourism revealed that the sector takes an average of 22.2 months to recover completely from crises related to political instability or civil unrest, compared with 11.5 months for terrorist incidents or 16.2 months for natural disasters<sup>2</sup>.

Figure 2: Total Travel & Tourism contribution to GDP, trend since 2000 (Year 2000 = 100)



Despite these setbacks, however, Travel & Tourism's total contribution to the African economy overall more than doubled between 2000 and 2019, and Africa's significance to the global sector grew in tandem. In 2000, Africa accounted for 1.3% of global Travel & Tourism contribution to the economy and 4.9% of global Travel & Tourism jobs. By 2019, these shares increased to 1.9% and 7.5% respectively. Of all regional Travel & Tourism sectors, Africa's had the most even distribution of spending by domestic and international visitors. Revenues from domestic tourists constituted 57% of total Travel & Tourism spending in Africa, with revenues from international tourists contributing the remaining 43% in 2019. The distribution of spending by leisure and business travellers was less even, with leisure travellers accounting for 70% of all spending.

Egypt's Travel & Tourism sector had the largest contribution to the national economy among all African countries in 2019, at US\$31.5 billion, followed by South Africa, then Nigeria (Figure 3).

The three most populous nations in Africa are Nigeria, Ethiopia, and Egypt, whose Travel & Tourism sectors also supported the three largest numbers of jobs on the continent in 2019: 3.36 million in Nigeria, 2.42 million in Egypt, and 1.9 million in Ethiopia.

The African country most reliant on Travel & Tourism in 2019 was Seychelles, where the sector's share of national GDP was nearly 53% in 2019 – placing it fifth globally. The second and third most reliant were Cabo Verde and Mauritius, respectively. As Figure 4 shows, these three countries were also the most dependent on spending by international visitors. Among the five countries with the largest Travel & Tourism sectors, the distribution between international visitor spending and domestic visitor spending varied considerably. Egypt and Morocco relied more on their international visitors whereas South Africa, Nigeria, and Algeria relied more on their domestic tourists. In fact, Algeria's sector was almost entirely supported by its domestic market.

Figure 3: 15 Largest total Travel & Tourism contribution to GDP in 2019, US\$ billions

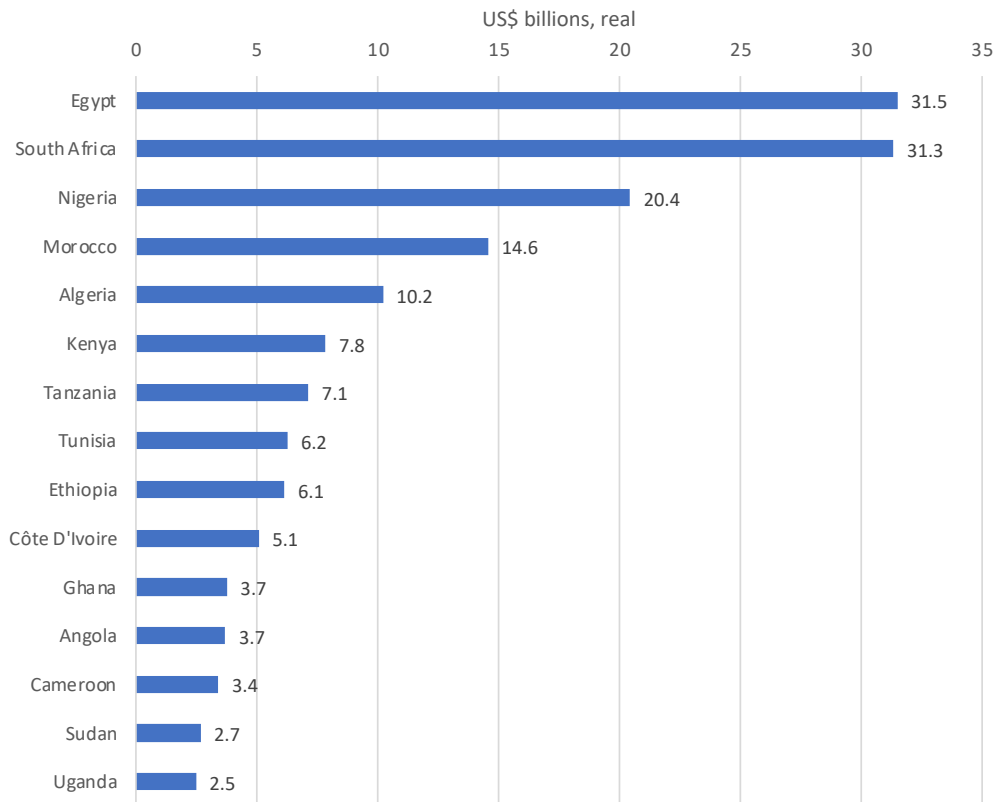
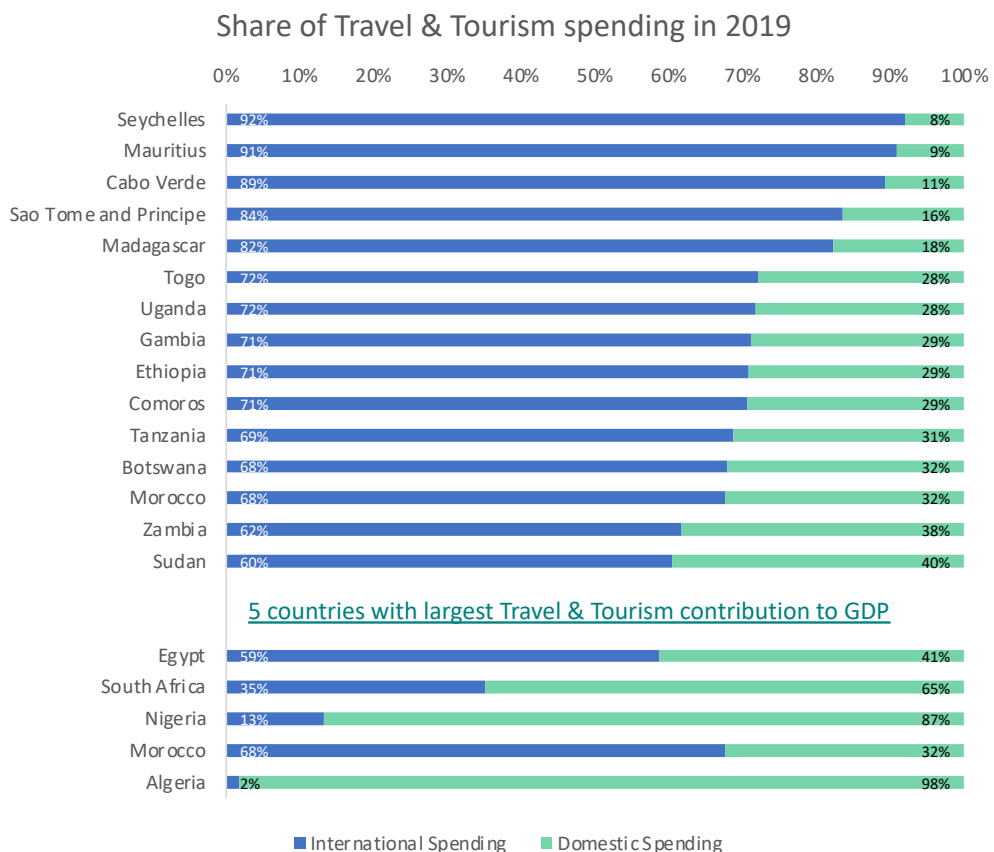


Figure 4: Share of Travel & Tourism spending in 2019, international visitor spending vs domestic visitor spending

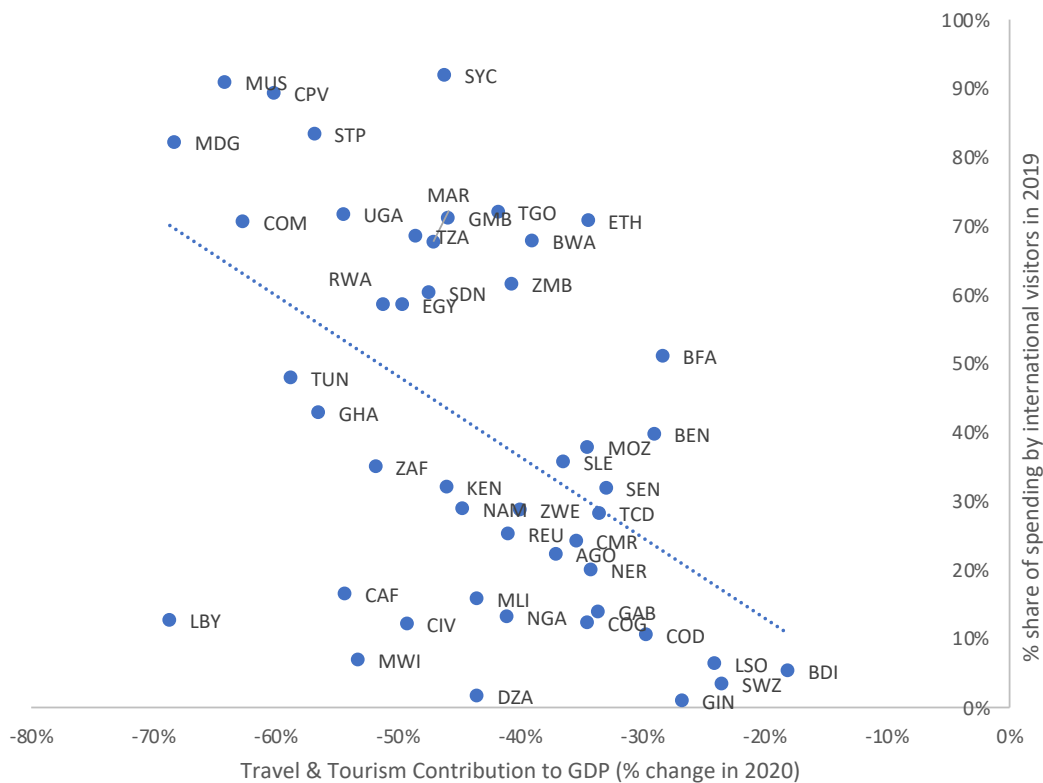


### 3.1 The Impact of the Pandemic

In 2020, the African Travel & Tourism sector experienced its most dramatic shock in history, with 6.7 million jobs lost across the continent and the sector's economic contribution nearly halving to reach levels not seen since 2003. Despite the 47% drop in Travel & Tourism's GDP contribution in Africa being slower than the global average decline of 49%, the region's relatively higher intensity of labour and the lack of job support schemes resulted in a higher rate of job loss than the global average. Few African states could afford job support schemes of the sort seen in other regions such as Europe.

Although the curbs on the movement of people in 2020 were imposed on both domestic and international travellers, they were longer and more severe for the latter. For this reason, there was a negative correlation all over the world between dependency on international visitors in 2019 and rate of downturn for the sector in 2020, as illustrated in Figure 5 below (see Appendix for more detail on the country codes used). With the notable exception of Libya, countries with higher reliance on international visitors in 2019 experienced larger decreases in Travel & Tourism contribution to GDP in 2020.

Figure 5: Correlation between the share of international visitor spending in 2019 and % change in Travel & Tourism GDP in 2020



Note: see Appendix for a description of 3-letter country codes.

### 3.2 Recovery

As travel restrictions were lowered in 2021, the African Travel & Tourism sector bounced back by 23.8%. Spending by domestic tourists saw a 32.9% increase, while spending by international visitors rebounded at the slower rate of 25.8%. The imposition of a blanket travel ban on South Africa and other neighbouring countries following the discovery of the new Omicron variant in November 2021 was one of the key reasons behind the weaker recovery in revenues from international visitors. In South Africa, according to IATA, total flight bookings dropped to 7% of pre-pandemic levels in the face of these travel bans<sup>3</sup>.

The sector continued its return to pre-pandemic levels in Africa in 2022 with an annual growth of 37.6% which was significantly faster than the global average of 22.0%. Travel & Tourism's total contribution to Africa's GDP rose to US\$168 billion – 5.9% of the regional economy – but remained 9.7% below the peak of 2019. The sector's contribution to employment also improved its rate of recovery in 2022, with 2.6 million new jobs created across Africa. Spending by domestic travellers on the continent recovered fully to its 2019 level, while spending by international visitors increased by 76.3% to reach 80% of its 2019 level. North Africa edged very close to a full recovery, with a 45.8% annual growth, placing its sector's contribution to the economy in 2022 only 1.5% behind where it was in 2019. Sub-Saharan Africa also experienced strong growth of 33.2% but remained 14% short of its pre-pandemic levels.

In 2023, Africa's Travel & Tourism sector is expected to make almost a full recovery from the losses of COVID-19, with forecasts projecting the sector's contribution to GDP to be just 1.9% short of 2019 figures and an additional 1.78 million jobs compared to 2022.

### 3.3 Future Forecast (2023 – 2033)

Over the next decade, i.e. between 2023 and 2033, the Travel & Tourism sector's contribution to Africa's economy is forecast to grow at 5.1% annually (under the baseline scenario). This is compared to a forecast annual growth rate of 3.1% for the African economy overall. Only the Asia-Pacific region is projected to grow at a faster rate. At the same time, the sector's contribution to jobs in Africa is forecast to increase by 12.7 million.

Among African countries, Madagascar is projected to have the strongest annualised Travel & Tourism growth rate (9.9%) in the next decade, followed by Libya (8.9%) and Mauritius (8.6%) See Table 1. Countries with a larger Travel & Tourism sector are also forecast to experience strong growth in the next decade. For example, the growth rates in Egypt and Morocco are projected to be 5.3% per year between 2023 and 2033. In the same period, Travel & Tourism in Kenya and South Africa is forecast to grow by 5.2% and 4.1%, respectively, each year.

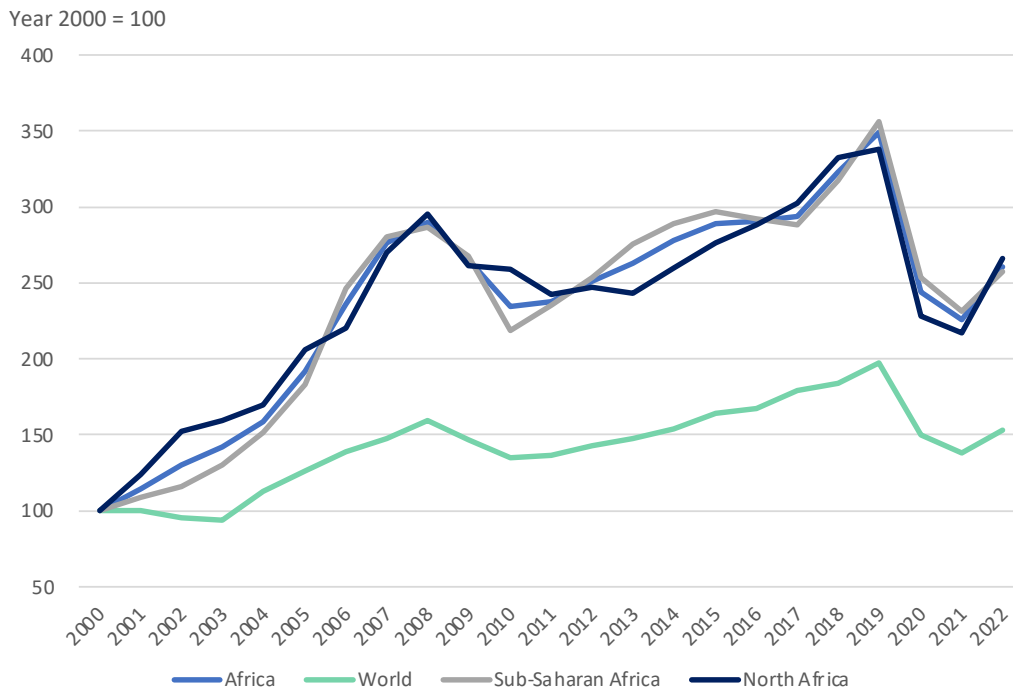
Table 1: **Total Travel & Tourism contribution to GDP, top 10 fastest CAGR (Compound Annual Growth Rate) between 2023 and 2033**

Rank	Country	2023-2033 (CAGR)
1	Madagascar	9.9%
2	Libya	8.9%
3	Mauritius	8.6%
4	Malawi	7.7%
5	Côte D'Ivoire	7.3%
6	Niger	6.9%
7	Gambia	6.9%
8	Togo	6.9%
9	Rwanda	6.6%
10	Sierra Leone	6.5%

### 3.4 Travel & Tourism Investment

Investment into Travel & Tourism in Africa has risen at a much stronger rate than the global average since 2000. Between 2000 and 2019, global Travel & Tourism investment approximately doubled in size. But in Africa, investment increased by around three and a half times, and at a broadly consistent rate across the continent (see Figure 6).

Figure 6: Travel & Tourism investment, trend between 2000 and 2022 (Year 2000 = 100)



The largest Travel & Tourism investment in 2019 was recorded in Nigeria (at US\$8.1 billion), followed by Egypt (US\$7 billion) and then South Africa (US\$5.4 billion). Africa as a whole experienced a 7.3% annual decline in Travel & Tourism investment in 2020, with the steepest decline in Libya (-72.2%) followed by Madagascar (-62.5%) and then Mauritius (-57.1%). However, investment levels began to recover to pre-pandemic levels in almost all African countries in 2022. Over the next ten years, Sudan is forecast to experience the highest rate of annual growth in Travel & Tourism investment in Africa (14.7%), followed by Togo (10.7%). Prominent markets such as South Africa and Kenya are projected to realise 5.8% annualised growth for investment into their sectors between 2023 and 2033, while the rate of growth is forecast to be stronger in Nigeria, at 6.4% per year. Comparatively, Travel & Tourism investment growth in Egypt is forecast to be lower, at 3.9% per annum.



## 4. ENVIRONMENTAL AND SOCIAL IMPACT OF TRAVEL & TOURISM IN AFRICA

**The damaging effects of climate change are already being felt in Africa, and actions to mitigate further impact on the environment are urgently needed.** Environmental and Social Research (ESR) – a joint project between WTTC and the Saudi Arabia-incubated Sustainable Tourism Global Center (STGC), produced in partnership with Oxford Economics<sup>4</sup> – aims to quantify the environmental footprint of Travel & Tourism so that action plans can be formulated to ensure that the sector continues to support livelihoods across the globe without harming the natural ecosystem upon which the sector depends.

The total greenhouse gas (GHG) emissions from Travel & Tourism in Africa reached 189.8 billion kg of CO<sub>2</sub> in 2019, accounting for 6.6% of all emissions in the region. This includes emissions from Scope 1 (direct), Scope 2, and Scope 3 of the Greenhouse Gas Protocol<sup>5</sup>, and from international transport.

Between 2010 and 2019, the sector's GHG emissions in Africa increased by an average of 1.3% per annum, which is slower than the global average annual rate of 2.5%. The pace of increase in the sector's emissions was also slower than the growth in the sector's contribution to the African economy, which rose by an average annual rate of 2.6% (only direct and indirect impacts). This suggests a relative decoupling of the sector's growth from its emissions.

Table 2 below compares the annualised growth rate of the sector's contribution to GDP and annualised growth rate of the sector's GHG emissions in ten African countries between the years 2010 and 2019. The last column captures the extent to which the increase in the sector's economic contribution outpaced the change in the sector's emissions. In Botswana, for instance, Travel & Tourism's contribution to GDP (direct and indirect impact) increased by 5.8% per annum between 2010 and 2019 while the sector's emissions fell by 1.9% per annum over the same period. This decoupling of growth from emissions is captured by the positive value (7.7%) in the last column of the table. A negative value would suggest that emissions by the sector had grown at a faster rate than its economic contribution. The region's average overall decoupling of economic growth from GHG emissions was accompanied by a fall in GHG intensity (the amount of GHG emissions per unit of GDP contribution). GHG intensity for the sector in Africa fell from 1.44kg of CO<sub>2</sub> per dollar in 2010 to 1.28kg of CO<sub>2</sub> per dollar in 2019.

The sector's GHG emissions in the region halved in 2020 due to COVID-19 and the subsequent halt in activity, before rebounding by 20% in 2021 with the resumption of travel.

Table 2: Top ten African countries with highest difference between Travel &amp; Tourism GDP growth and Travel &amp; Tourism greenhouse gas emissions growth, 2010 - 2019 CAGR

Country	Travel & Tourism GHGs: 2010-2019 (CAGR)	Direct + Indirect Travel & Tourism GDP: 2010-2019 (CAGR)	Difference between Travel & Tourism GDP CAGR and Travel & Tourism GHG CAGR
1. Botswana	-1.9%	5.8%	7.7%
2. Tanzania	4.9%	9.3%	4.4%
3. Cameroon	5.0%	8.9%	3.9%
4. Ethiopia	0.3%	4.1%	3.8%
5. Rwanda	9.9%	13.5%	3.7%
6. Nigeria	2.5%	6.1%	3.6%
7. Namibia	-0.1%	3.5%	3.5%
8. Gabon	-2.4%	0.8%	3.2%
9. Uganda	3.9%	7.0%	3.2%
10. Madagascar	3.3%	6.4%	3.1%

Another important aspect of ESR is the quantification of the sector's energy usage. In 2019, Travel & Tourism's contribution to Africa's economy was supported by energy usage totalling 2.73 million terajoules (TJ). Fossil fuels accounted for 88.5% of this energy, while 8.8% was sourced from biofuels and waste, and 2.7% from low-carbon energy (which includes renewables such as solar, wind, wave, geothermal, and hydropower, as well as nuclear energy). African Travel & Tourism is less reliant on fossil fuels than at a global level, where the sector derives 89.6% of its energy from fossil fuels. It also uses a higher proportion of its energy from biofuels and waste energy than the sector in any other region, especially in Sub-Saharan Africa, where the share is 13.8%. African Travel & Tourism's energy intensity (the energy used to contribute US\$1 to the economy) decreased by 1.6% each year between 2010 and 2019, which was the second fastest regional decrease after Asia-Pacific, where energy intensity fell by 2.8% per year. Côte d'Ivoire and Togo's annual drops in energy intensity were the 9<sup>th</sup> and 10<sup>th</sup> largest in the world during this period.

Table 3: Share of non-fossil fuel sources of energy in Travel &amp; Tourism's total energy use, 2019

Rank	Country	2019
1	Zambia	69.4%
2	Madagascar	63.5%
3	Uganda	61.7%
4	Congo, Dem. Rep.	46.4%
5	Rwanda	46.3%
6	Gabon	44.3%
7	Tanzania	40.5%
8	Togo	39.5%
9	Mozambique	39.4%
10	Sudan	39.0%

Another critical resource that the Travel & Tourism sector relies on is water. As a share of the region's total water withdrawal from renewable freshwater resources, the sector only accounted for 0.6% in 2019. The share dropped even further to 0.3% and 0.4% in 2020 and 2021 respectively, as the pandemic limited activities in the sector. In absolute terms, Travel & Tourism in Africa used nearly 1.5 billion m<sup>3</sup> of fresh water in 2019, and compared to water usage in 2010, this represents a drop of 6.7%. Only in Africa and Europe did the sector reduce its water usage between 2010 and 2019 while simultaneously increasing its economic contribution to the regional economies. In 2019, 57% of the water usage was sourced from areas determined to be under “high” or “extremely high” water stress<sup>6</sup>. Only the Middle East had a higher reliance on such highly water-stressed areas. However, the water intensity of African Travel & Tourism declined by 3.3% per year between 2010 and 2019, which was faster than the 2.1% global average annual rate of decline.

Travel & Tourism is a highly inclusive and diverse sector, enriching local communities and employing individuals from all walks of life. Of the workers in Africa who were directly employed by Travel & Tourism in 2019, almost 33% were female, which is below the global average share of 40%. However, the number of female workers in the sector grew more quickly during the 2010s than the number of male workers (the difference in the annual growth rates being 1.2 percentage points), signalling growing female participation in the sector. Young workers (those aged between 15 and 24 years) accounted for 17% of the workforce directly employed by Travel & Tourism in 2019. This was the second highest share of all global regions, behind America's 21.2%.





# 5. CHALLENGES AND OPPORTUNITIES

**From pioneering climate-friendly solutions to innovative support for small and medium-sized enterprises (SMEs), Travel & Tourism has a bright future in Africa, but the sector is also faced with challenges.** This section of the report seeks to outline some of these challenges and highlight some opportunities to support the future growth of a sustainable and inclusive Travel & Tourism sector for Africa.

## 5.1 Challenges: Connectivity and Infrastructure

Investment in infrastructure and connectivity is a critical driver of future growth in Travel & Tourism. Between 2000 and 2019, capital investment into the sector in Africa rose at an annual rate (CAGR) of 6.8%, which was significantly higher than the global annual rate of 3.6%. Despite such promising growth, sectoral investment in Africa was still the lowest among all global regions in 2019, at just US\$39.6 billion. And when the pandemic hit in 2020, investment into Africa's Travel & Tourism sector dropped by 30.2%, which was larger than in any other region. Investment fell by a further 7.3% in 2021. Although investment in the continent started to recover as travel resumed in 2022, it is not expected to reach pre-pandemic levels until 2025, based on its current trajectory.

Lack of connectivity, both into and within the continent, poses a significant regional challenge. According to IATA, despite experiencing a 24.8% annual growth, total air traffic in Africa in August 2023 (as measured in revenue passenger kilometres or RPKs) was still 8.3% below its pre-pandemic level and accounted for only 2.1% of the overall global share – the lowest of any region<sup>7</sup>.

The total number of scheduled seats into Africa grew by 6.1% between 2022 and 2023, placing them at almost 1% above pre-pandemic levels<sup>8</sup>. However, the scale of recovery varies by departing region. While seats from Western Europe and the Middle East – the two key international source markets for Africa – as well as North America are all above pre-pandemic levels, seats from Eastern and Southeastern Asia and from Latin America and the Caribbean are still below where they were in 2019. Most dramatically, seats from Eastern and Southeastern Asia into Sub-Saharan Africa are at nearly 30% and 33% below their pre-pandemic levels respectively. The number of seats from Eastern Asia is likely to be much improved in 2024, with a continued increase in travellers from China following its reopening at the start of 2023.

Air connectivity is a crucial factor in determining the success of cities as tourism destinations play a significant role in enhancing connectivity in surrounding regions. The presence of a major airport often drives infrastructure development in surrounding areas, including improved road networks and the construction of hotels and other amenities. Table 4 below shows the top 10 inbound air hubs in Africa by the number of seats in 2023 and how this compares with 2019. The busiest city in 2023 was Cairo, which saw a 34% increase compared with 2019, followed by Johannesburg (22% decrease) and Addis Ababa (19% increase). Restoring air capacity to the levels seen in 2019 and establishing effective strategies for future growth are vital for the recovery of the African Travel & Tourism sector and for ensuring the economic prosperity of cities and their surrounding regions.

Table 4: Top 10 inbound African air hubs (by the number of inbound seats)

Rank	Top African air hubs	Change % 2019-2023
1	Cairo	34%
2	Johannesburg	-22%
3	Addis Ababa	19%
4	Casablanca	-11%
5	Cape Town	-6%
6	Nairobi	-11%
7	Algiers	-2%
8	Tunis	4%
9	Marrakech	9%
10	Lagos	-13%

Source: Mabrian Travel Intelligence, September 2023

Overall, while there have been encouraging developments in capital investment, air traffic, and capacity following the COVID-19 pandemic in Africa, additional steps are evidently necessary to achieve a complete recovery and to fully leverage the continent's potential.

Connectivity between African states also poses a key challenge for inbound visitors who often ask Destination Management Companies and travel advisors which African state they should visit. As the continent is a long-haul destination for many of its inbound source markets such as France, the United Kingdom, the USA, and China, travellers request itineraries to make the most of their time in one country. Cross-country itineraries would eliminate the perception that travellers only need to visit one African country and pose opportunities for collaboration and even repeat visitors. To facilitate these cross-regional itineraries, there exists an opportunity for a 'single African sky', thus opening up air routes between states and making travel between these states simpler and easier.

A lack of effective visa facilitation processes in some countries is another key challenge to the region's future growth. Travellers increasingly value convenience and simplicity in their travel journey; 37% of surveyed global travellers recently said that immigration requirements have discouraged them from travelling to a particular destination. Around two thirds of travellers reported process complexity as the main deterrent, while 12% cited visa costs, and 8% cited the additional time<sup>9</sup> that meeting immigration requirements can take. Some African nations still handle visas manually which eats up additional traveller time and increases the risk of human error or even fraud. Clearer and simpler procurement processes for staff could translate into simpler and quicker processes for travellers, and therefore increased visitor numbers.

## 5.2 Opportunities: Strategic Investments

Strategic investments would help address some of these connectivity challenges. While the Yamoussoukro Declaration opened African skies between the signatories, over 30 years later, its full potential has yet to be realised. This is in part due to a range of factors including protectionism and a lack of infrastructure. While state investments into national carriers are an option, opening up routes for more established international airlines – and channelling state investments into infrastructure such as airports and new technologies – instead may prove more fruitful. For those states that wish to maintain flag carriers, it is nonetheless possible to permit foreign investments into those carriers. This model has proven particularly beneficial for Ghana, whose new national carrier Ghana Airlines is funded by a UK-based investment fund.

**In Focus: Ghana Airlines**

Central to the success of Ghana Airlines was a recognition of the need for extensive investment in aviation infrastructure. Kotoka International Airport in Accra, the country's primary international gateway, underwent a metamorphosis. Expansions and renovations were undertaken to ensure the airport would be able to accommodate the anticipated surge in passenger traffic and aircraft movements comfortably. Investments and infrastructure changes included a new air traffic control tower, new airport hotels, new terminals and runways, and new eco-friendly and green initiatives to reduce energy consumption and environmental impact<sup>10</sup>. International overnight arrivals were steadily increasing in the years leading up to the pandemic. In 2019, Ghana welcomed nearly 1.2 million international visitors.

**Establishment of a new national carrier**

In 2018, Ghana's Ministry of Aviation unveiled plans to resurrect a national airline to fill a void left by the previous national carrier, Ghana International Airlines, which had suspended operations in 2010.

This strategic endeavour aimed to reestablish Ghana's presence in the aviation arena. In addition, "Ghana Airlines" would be both a symbol of national pride and a catalyst for economic growth.

**Strategic partnerships**

The Ghanaian government sought to align with international airlines and investors who could contribute their expertise, route networks, and financial resources to bolster Ghana Airlines' potential for success<sup>11</sup>. As of 2023, the airline has been funded by UK-based investment fund Zotus Group<sup>12</sup>.

**Job creation and economic impact**

The establishment of Ghana Airlines promised job creation on a significant scale. The airline is set to generate employment both directly, through its operational activities, and indirectly, by stimulating the growth of Ghana's tourism and hospitality sectors.

Beyond job creation, Ghana Airlines also has the potential to boost tourism, to facilitate trade, to attract foreign investment, and to position Ghana as regional aviation hub.

Relevant lessons about cross-regional itineraries can be taken from the Schengen Zone. While Africa is much larger than Europe, visa agreements could be made within existing regional structures such as the Southern African Development Community (SADC) and Economic Community of West African States (ECOWAS). The East African Tourist Visa between Kenya, Rwanda, and Uganda is an instructive example of how collaboration between neighbouring states can help to ease traveller visa processes and to make travel simpler. Such agreements would also enable neighbouring states to benefit from regional connectivity hubs such as Johannesburg, Addis Ababa, and Cairo.

Addis Ababa, for example, functions as a continental hub with the support of a world-class airline and airport. Ethiopia's success in airline connectivity demonstrates the transformative power of a well-managed national carrier. Ethiopian Airlines not only contributes to the country's economic growth, but also enhances regional and global connectivity, fostering cultural exchange, trade, and tourism.

**In Focus: Ethiopia, a regional hub**

Ethiopia's aviation sector should serve as a model for countries looking to leverage their geographic location and resources to build a strong and globally competitive airline industry. Ethiopia's remarkable success in establishing and growing an award-winning, world-class national airline is well known. Ethiopian Airlines has played a pivotal role in enhancing global and regional connectivity, in fostering economic development, and in promoting tourism in Ethiopia and in Africa more broadly.

**Hub and spoke model**

Ethiopian Airlines has adopted a hub-and-spoke model<sup>13</sup> centred around its hub, Addis Ababa Bole International Airport. This model efficiently connects passengers from various global destinations to multiple African cities through the hub of Addis Ababa, facilitating easy travel around the continent. The airline boasts an extensive route network, serving over 120 international destinations across five continents. This widespread coverage enhances Ethiopia's global connectivity and positions it as a crucial transit point for travellers<sup>14</sup>.

**Infrastructure development**

Ethiopian Airlines maintains a modern fleet of aircraft, including the latest Boeing and Airbus models, and significant investment has been channelled into airport infrastructure. Addis Ababa Bole International Airport has undergone significant infrastructure development to accommodate the growing number of passengers and cargo shipments.

**Effective training**

This development has been supported by effective training<sup>15</sup> for Ethiopian Airlines pilots, cabin crew and maintenance technicians. In the same spirit of cooperation, the airline actively supports the African Union's goal to establish a Single African Air Transport Market (SAATM) which would liberalise air travel across the continent<sup>16</sup>.

To address cumbersome and lengthy visa processes, a range of potential solutions exist. Effective visa processing models have been developed by service providers like VFS Global, encompassing end-to-end visa application solutions, both with and without biometric enrolment. These solutions allow outsourcing of the non-judgemental and administrative burden of visa processing, and ensure that the decision-making authority remains with the immigration office or visa officer at the embassy or consulate. Such solutions have been developed for the US, UK, Schengen countries, and others by VFS Global.

In scenarios where there is no embassy or consulate in the country, or to better manage application loads, location independent document processing solutions can be implemented. For these models, VFS Global facilitates the secure collection and transfer of visa applications globally, irrespective of time zone differences. Countries like Finland and the UK have adopted these solutions in certain geographies.

Yet another solution is an e-visa – an online application system where a visa can be applied for from the comfort of traveller's home or office at any given time of day. This includes submitting all required documents and payment of fees from a desktop, laptop, or mobile phone. The e-visa can be accessed using an email address and can be used digitally during the travel. E-visa solutions are working well in countries like Malaysia and Thailand and could have applications for African countries, too.

Where budget and other constraints do not allow for these types of solutions, more models exist. These include digital "lockers" which securely save user information and can be verified by governments through encrypted links. Digital document checking solutions are working particularly well in Ghana and South Africa and could have applications for other countries on the continent.

The Visa At Your Doorstep solution (VAYD), developed by VFS Global, is yet another visa model that has applications for MICE tourism. It offers a convenient, customised and secure solution where applications can be submitted at the applicant's choice of location (home / office) significantly expanding the application submission channel. Use of the VAYD solution is especially beneficial at ports where, upon arrival, biometrics of cruise ship passengers or staff can be captured by governments for immediate visa issuance.

## 5.3 Challenge: Supporting Social Sustainability

Travel & Tourism has a tremendous social impact on the lives and livelihoods of people touched by it; not only by driving economic growth, but also by enhancing social progress. Through the revenues and jobs that it provides (especially for women and young people), the trickle-down effects include poverty reduction and improvements to infrastructure, health, and education. But there are currently significant obstacles to these potential benefits in Africa.

There are still large gaps in knowledge, skills, education and health between Africa and the rest of the world. Human capital levels also differ widely within the continent, tending to be higher in Southern African countries such as Botswana, South Africa, and Zimbabwe, and in North African countries such as Egypt and Tunisia<sup>17</sup>.

One cause is Africa's 'brain drain'. In 2018, the African Union estimated that 70,000 skilled professionals were emigrating from the continent every year to seek better career opportunities<sup>18</sup> elsewhere. As emigrants tend to be better qualified than the general population, this means that Africa loses out on their skills and expertise, exacerbating the notable skills shortage, which is particularly acute in sub-Saharan Africa. More than 30% of people aged 15+ in this region lack basic literacy, and while the global average enrolment in tertiary education institutions is 35% of the adult population, in sub-Saharan Africa it is just 8.6%. Most African countries are expected to continue seeing below average levels of post-secondary education over the next three decades, so there is an urgent need for interventions to develop skills and increase formal education levels<sup>19</sup>. Unemployment in Africa in 2022 was also estimated at 7.1%, higher than the world average of 5.7%.

Africa has the youngest population of any major region: 60% were aged under 25 in 2021<sup>20</sup> compared with a world average of 41%. Yet in 2021, Travel & Tourism directly contributed just 1.3% of all jobs for young people (aged 15-24) in Africa, compared to a global average of 3.8%, which was lower than in any other region<sup>21</sup>. And while the youth share of overall jobs in Africa was 21.9% in 2021, young people only accounted for 16.8% of all direct Travel & Tourism employment. This is partly due to the importance of the agriculture sector in Africa and to the fact that in developing nations, jobs in Travel & Tourism are seen as relatively more valuable and skilful than in developed countries, which results in them being more sought-after, held longer and by more senior workers. In addition, more than a quarter of young people in Africa – around 72 million – are not in employment, formal education or training<sup>22</sup>. Although direct youth employment in African Travel & Tourism grew from 1.31 million in 2010 to 1.57 million in 2019, the COVID-19 pandemic took this back below 2010 levels during 2020 and 2021.

Women have also been underrepresented in African Travel & Tourism. In 2021, the sector accounted for only 3.9% of all female employment in Africa, compared to the global average of 8.0%, which is lower than in any other region. Although the proportion of women directly working in Travel & Tourism in Africa rose from 30.5% in 2010 to 33.5% in 2021, this is still lower than the global average of 39.3% and notably less than the 43.5% female share of jobs in Africa's overall economy. This discrepancy – the starkest in the world – is primarily due to the fact that in North Africa, only 15.2% of direct Travel & Tourism jobs were carried out by women in 2021, pulling down the overall Africa average.

As technology advances, employers increasingly struggle to recruit people with the necessary digital skills. Many African countries face challenges in providing access to quality formal education and digital literacy training which is crucial for taking advantage of new technologies<sup>23</sup>. Less than one-third of the African population has broadband access, and approximately 300 million people live more than 50km away from a fibre or cable connection<sup>24</sup>. Rural communities are particularly hampered. Where broadband connectivity does exist, the cost of devices, data plans, and electricity are a significant barrier to digital inclusion, especially for people on lower incomes.

Another key challenge, globally, is safety and security. In Africa, as with other continents, levels of safety and security vary by country. However, the issues are more acute in certain countries with these issues making media headlines in source markets acting as a deterrent to travel.

**In Focus: VFS Global's Hospitality Training Programmes**

In addressing the burgeoning potential of Africa's Travel & Tourism sector, a structured approach towards skills development and global exposure is paramount. VFS Global, with its extensive global network and proven expertise, emerges as a potential collaborative partner for African nations in this endeavour. The company's established framework for Training Programmes offers a scalable model that can be customised to align with the distinct requirements and aspirations of each nation within the African continent. These programmes aim at enriching the industry-specific skills of the workforce, enhancing their global acumen, and subsequently elevating the global standing of the region's tourism landscape.

VFS Global's Global Resource Pool Programme initiated in Saudi Arabia provides an example of a model that could have applications in Africa. This programme entailed a comprehensive training regimen for Saudi nationals within the realms of tourism, travel, and customer service, followed by a year-long international assignment across various countries. This dual-pronged approach not only fortified the participants with industry-relevant skills but also provided a platform for global exposure, thereby serving the broader objective of promoting Saudi Arabia as a desirable travel destination. Through such collaborations, African nations can significantly accelerate the evolution of their Travel & Tourism sector, aligning with global best practices while fostering a culture of continuous learning and improvement.

## 5.4 Opportunities: Addressing Skills Shortages and Supporting Local Communities

As a major provider of jobs in Africa, Travel & Tourism has the potential to transform many lives. In 2021, 36.2% of direct Travel & Tourism workers in Africa were in high-wage sectors, which is higher than both the global average of 33.9% and the 2010 figure of 34.7%. It is also higher than in the overall African economy where 26% of all workers were in high-wage sectors<sup>25</sup>. Of the four countries globally with the highest proportion of direct Travel & Tourism jobs classed as "high-wage" in 2021, three are in Africa: Rwanda (97.6%), Burundi (93.8%), and Kenya (84.8%).

This is a good foundation for encouraging more young Africans to consider careers in Travel & Tourism, and some African nations have seen significant progress on this front in recent years. Rwanda saw an annual growth rate (CAGR) of 11.1% in direct youth employment in the sector<sup>26</sup> between 2010 and 2019. Governments can help more young people get into long-term Travel & Tourism jobs by giving them greater access to high-quality training, such as through programmes to enhance digital literacy and technology skills among underserved populations.

Education technology solutions such as online learning platforms, mobile apps, and interactive digital content have already been developed across Africa with a view towards addressing the challenge of providing quality education, especially in areas with limited infrastructure.

The Rwandan government is currently implementing its 2017-2024 National Strategy for Transformation (NST), which aims to ensure digital literacy for all 16- to 30-year-olds and at least 60% of all adults by 2024 through a national digital literacy programme<sup>27</sup>. This will be supplemented by initiatives to help all citizens access digital devices and use online services, including accommodations for people with disabilities. The government's Digital Ambassador Programme (DAP) has recruited young social innovators to provide digital literacy training to members of their own communities, in local languages and focusing on locally relevant digital content and services, with support from the e-learning platform Atingi. By 2022, approximately 68,000 individuals had been trained under the initiative<sup>28</sup>.

**In Focus: Digital Egypt Builders Initiative**

The Digital Egypt Builders Initiative (DEBI) launched in 2018, with a clear vision to position Egypt as a leading digital hub in the Middle East and North Africa (MENA) region.

DEBI encompasses several key objectives to this end. First, it aims to enhance Egypt's digital infrastructure, focussing on improving broadband access, expanding data centres, and optimising e-governance platforms, in order to facilitate the seamless flow of information and services. Second, DEBI seeks to nurture a skilled workforce capable of driving digital innovation and entrepreneurship by investing in education and training programmes. Third, it works to diversify Egypt's economy by promoting the growth of digital startups and by attracting foreign investment in the technology sector; in 2021, for example, Microsoft partnered with DEBI<sup>29</sup> to provide technology awareness courses and training in cybersecurity mitigation. Lastly, DEBI aims to extend digital inclusion to all segments of Egyptian society, bridging the digital divide and ensuring that essential digital services are accessible to everyone<sup>30</sup>.

**Results of the DEBI**

DEBI has already yielded positive results, including training over 1,000 university students, and increasing their capital in advanced technical areas. The initiative also led to the creation of the Digital Egypt Cubs Initiative (DECI) to equip primary and secondary school students with invaluable IT skills, including courses on specialised technology areas such as AI, software development and digital arts. Since its inception in 2022, it has already upskilled 3,000 primary and secondary school students.

There is a gendered digital divide in Africa, where access to digital technologies is often easier for men than for women. In part, this reflects unequal educational and work opportunities and gendered cultural norms: women generally have less access to digital literacy training. Helping women in Africa to benefit from Travel & Tourism jobs by developing their digital skills could contribute to alleviating their poverty and economic exclusion. Governments and businesses should adopt family-friendly policies and conditions, increase the representation of women in decision-making positions and eliminate discriminatory wage gaps. Within the workplace, this generally requires setting company-wide goals against which to measure and monitor progress.

In Tanzania, women account for more than 60% of all people directly working in Travel & Tourism. Examples of high female participation in the Tanzanian Travel & Tourism workforce include the Dunia Camp, a safari lodge in the central Serengeti staffed entirely by women<sup>31</sup>, and the Tanzania Women Guides Foundation, an NGO which provides training programs to promote female guides on Mt Kilimanjaro. In 2023, women in the country's tourism sector launched the Tanzania Association of Women Tour Operators (TAWTO) to promote gender equality alongside the Association of Women in Tourism Tanzania<sup>32</sup>.

Young people and women must have access to the internet in order to acquire the digital skills they need for a career in the sector. Governments that invest in widespread broadband connectivity infrastructure will see ample rewards in long-term productivity.

Kenya is one of Africa's pioneers in this regard, having already built around 9000km of connectivity fibre since 2008 through the National Optic Fibre Backbone Infrastructure Project. Its current National Digital Master Plan includes a commitment to install 100,000km of high-speed fibre optics<sup>33</sup>. With US\$390 million of funding acquired from the World Bank in 2023<sup>34</sup>, the Kenyan government will be able to boost broadband network coverage for over 70% of its population that live in rural and underserved areas.

Micro, small and medium-sized enterprises (MSMEs) – which make up the majority of Travel & Tourism businesses globally – typically face high costs for internet speed and data allowances. Their ability to use digital technologies can therefore depend on their access to loans. MSMEs that are enabled to access funding more easily will then have more opportunity to invest and thrive.

### **In Focus: Kenya’s Hustler Fund**

Kenya’s “Hustler Fund”, introduced in late 2022, represents an innovative approach to empowering grassroots entrepreneurs, often referred to as “hustlers.” It provides financial support, training, and resources to individuals engaged in small-scale businesses and in informal sector activities. The fund is designed to be inclusive and targets individuals from diverse backgrounds, including small traders, artisans, and micro-entrepreneurs. It recognises that economic empowerment should reach the grassroots level, fostering financial independence and reducing income inequality. The fund collaborates with government agencies, non-governmental organisations, and private sector partners by tapping into the expertise and resources of various stakeholders to maximise support for “hustlers.”

#### **Access to Capital:**

One of the Hustler Fund’s central features is providing access to capital for “hustlers” who may otherwise struggle to secure loans from traditional financial institutions. It offers microloans and grants to support small business development and expansion, in addition to entrepreneurship training programmes which equip “hustlers” with essential business skills such as financial literacy, marketing, and business management. This holistic approach enhances the businesses’ chances of success.

The application process for the Hustler Fund is designed to be straightforward and accessible, reducing administrative barriers to ensure that those who need support can easily apply and access those resources.

A robust monitoring and evaluation system is in place to track the impact of the fund. This includes assessing the growth of supported businesses, the creation of jobs, and the overall improvement in the quality of life for “hustlers” and their families.

#### **Local and Community Engagement:**

The Hustler Fund actively engages with local communities to identify beneficiaries and understand their unique needs, leveraging community networks to reach “hustlers” who may not be well-connected in formal business circles.

Beyond financial support and training, the fund promotes mentorship and networking opportunities. It connects “hustlers” with experienced entrepreneurs who can provide guidance and support to help them navigate the challenges of business ownership.

The African countries which provide their citizens with widespread access to the internet, with robust education and with opportunities for digital skills training are the most likely to see a growth in high-skilled workers. Nevertheless, many of those workers will still be tempted to emigrate, so it is also important for governments to counteract a potential ‘brain drain’ by easing labour mobility across borders in order to encourage skilled workers from neighbouring countries to enter. In 2018, the African Union Assembly adopted the Protocol on the Free Movement of Persons<sup>35</sup> which would enable all Africans to work freely in all other African countries. To date, however, only four countries have ratified the Protocol: Mali, Niger, Rwanda, and São Tomé and Príncipe. This is below the threshold of 15 countries needed for the Protocol to enter into force. ECOWAS, however, shows what can be accomplished at a regional level. The 15 member states – Benin, Burkina-Faso, Cabo Verde, Côte d’Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, and Togo – adopted

their own ECOWAS Free Movement Protocol in 1979, which also includes the right to work in other members states. By 2022, 97% of travel by nationals between them was visa-free<sup>36</sup>.

Addressing issues of safety and security benefits both residents and visitors, thus enhancing a destination's competitiveness. While each African country has its own set of challenges in these arenas, specific solutions must be determined by those countries or even local municipalities. In order to effectively address these concerns public-private-community partnerships can be leveraged to address specific issues and find ongoing solutions.

## 5.5 Challenge: Environmental Sustainability

The health of the natural environment is essential to Travel & Tourism. The scenic beauty of natural landscapes, the richness of biodiversity, and the opportunities for outdoor adventures are some of the primary motivations for tourism globally. The natural environment also provides resources, such as food and water, which sustain the sector's supply chain. Furthermore, Travel & Tourism is one of six economic sectors with over 80% of its output highly reliant on nature<sup>37</sup>.

Nowhere are the natural environment and biodiversity more critical to the Travel & Tourism sector than in Africa which has nine biodiversity hotspots<sup>38</sup>. The continent is renowned for its diverse natural landscapes, ranging from vast deserts to lush rainforests, and from rugged mountains to expansive savannas. This geographical diversity is mirrored in the variety of Africa's fauna, and wildlife tourism is a crucial component of Africa's tourism offerings.

But Africa's rich natural ecosystem is under increasing threats from multiple sources. More land for agriculture and housing are needed to support the rapid pace of population growth on the continent. The resulting rise in urbanisation and deforestation has destroyed the natural habitats of much of the continent's wildlife. Increases in temperatures and changing weather patterns are having damaging effects, too. In fact, the World Wildlife Fund (WWF) reports that Africa has experienced a 65% loss in its biodiversity since 1970<sup>39</sup>. Only Latin America and the Caribbean have experienced a larger biodiversity decline than Africa over the past fifty years. The deterioration of the continent's natural ecosystem is bound to impede the potential growth of the Travel & Tourism sector, so it is imperative for the sector to adopt a Nature Positive<sup>40</sup> approach that prioritises economic growth that is also environmentally sustainable.

## 5.6 Opportunity: Nature Positive Tourism

In 2018, wildlife tourism (tourism for which wildlife sighting or wildlife interaction is an important motivator) in Africa directly contributed US\$29.3 billion to the economy and directly supported 3.6 million jobs<sup>41</sup>. Put another way, wildlife tourism was responsible for 37.9% of Travel & Tourism's direct contribution to Africa's economy in 2018: a far larger share than the global average of 4.4%. Accounting for the indirect impacts and the wage-induced impacts, the total contribution of wildlife tourism in Africa totalled US\$70.6 billion in 2018 and supported 8.8 million jobs.

### **In Focus: Protecting Rwanda's Endangered Mountain Gorillas**

Mountain gorillas live in the volcanic mountains of the Democratic Republic of the Congo, Rwanda, and Uganda. In the late 1970s and early 1980s, they were in danger of becoming extinct due to the loss of their habitat, poaching, and nearby human conflicts. But conservation efforts by the governments, wildlife organisations, and local communities have since successfully reversed the downward trend in their numbers, and the gorilla population is now on the rise, with recent estimates north of 1000 individuals.

Nature-based tourism has played an important role in the conservation of mountain gorillas. Revenue from the sale of permits to see the gorillas, as well as guided tours, accommodation and transportation, has been used to fund conservation activities such as anti-poaching patrols and habitat preservation. The experience of seeing gorillas often leaves tourists with a deeper understanding of the need to protect them and thus represents an important medium for raising awareness. Nature-based tourism has also provided economic benefits to local communities and incentivised them to participate in the conservation of the mountain gorilla. The government also compensates local farmers whose crops are destroyed by wildlife, thus dissuading any retribution seeking if crops are affected by local wildlife.

In 2019, Rwanda's gorilla tourism generated US\$107.3 million in revenue, with the sale of permits (at US\$1,500 each) representing 22% of this revenue<sup>42</sup>. After a decline during the pandemic, revenue from gorilla tourism in 2022 surpassed its pre-pandemic level to reach US\$113 million<sup>43</sup>. Gorilla tourism sits on the higher end of the country's tourism offerings and is an important component of its nature-based tourism through its national parks. Rwanda operates a revenue-sharing scheme, whereby 10%<sup>44</sup> of revenue from tourism is distributed to the communities living around the national parks. This gives local communities a vested interest in ensuring the successful growth of tourism, which in turn aids conservation efforts.

Another area where Africa can leverage its Travel & Tourism potential is its abundant low-carbon energy sources, which could support the growth of Travel & Tourism while simultaneously minimising GHG emissions. According to the ESR<sup>45</sup>, in 2019, fossil fuels accounted for 88.5% of the African sector's energy use, while low-carbon energy and biofuels accounted for 2.7% and 8.8% respectively. The wider African economy, in comparison, only sourced 53.1% of its energy from fossil fuels, with 43.9% of its energy derived from biofuels and waste. It is therefore evident that the African Travel & Tourism sector has significant room for growth in terms of reducing its dependence on fossil fuels. Kenya has already more than doubled the share of its use of low-carbon energy (which includes renewable energy such as solar, wind, wave, geothermal, and hydroelectricity, as well as nuclear energy) from 7.5% in 2010 to 19.8% in 2019. This is the largest percentage point increase among 185 countries. It has achieved this through a combination of increasing investment, adopting environmental commitments, and implementing renewable-friendly policies. For instance, the introduction of a feed-in tariff (FiT) system in 2008 and the subsequent inclusion of geothermal and solar energy in 2010 both provided incentives for investment into renewable energy projects in the country. FiT guarantees a fixed rate of payment (tariff) for a specified period and thus protects energy producers from risks that come with the production of renewable energy. As a direct consequence, Kenya's Travel & Tourism sector increased its renewable energy usage (hydro and renewables) by 247% between 2010 and 2019.

Improving the efficiency of water use by the sector in Africa – and especially in North Africa – is another important way for Travel & Tourism to reduce its impact on the environment. In 2019, 57% of the water Travel & Tourism used in Africa was sourced from highly water-stressed regions (where water withdrawals represent more than 40% of available renewable water supplies). This is significantly higher than the global average of 36%. A deeper analysis reveals that this high African average is driven by North Africa, where 96% of the water used in Travel & Tourism was withdrawn from highly water-stressed regions, as opposed to 7% in Sub-Saharan Africa.

Overall, total water usage by the sector fell in absolute terms between 2010 and 2019 in Africa. The only other region where this happened was Europe. Since the sector continued to grow its economic contribution to the African economy at the same time, its water intensity (thousand cubic meter of withdrawals per million USD of GDP) fell by 3.3% per year. Investments into improved water distribution systems and wastewater treatment facilities would ensure further progress in this regard.

## 5.7 Challenge: Perceptions

The African Travel & Tourism sector also faces the challenges of stark seasonality and negative perceptions. African holidays are often seen as once-in-a-lifetime experiences. The perception many travellers have – that they only need to enjoy trips such as safaris once – can concentrate tourism into the peak safari season, discourage the return of visitors and lower the number of visitors for activities beyond safaris and wildlife excursions. A large number of tourists to southern Africa come from Europe, making this a long-haul destination. The distance of the trip, and associated costs, further contribute to the continent being seen as a place to visit only once.

There are also negative perceptions about levels of development and a lack of understanding of the geography of the continent among travellers from other parts of the world. When South Africa hosted the 2010 FIFA World Cup, for example, tour operators and accommodation providers reported receiving questions about whether there would be road infrastructure, internet, and even protection from dangerous wildlife. Even 13 years on, there are still incorrect perceptions that Africa does not have the infrastructure to support its own populations, let alone tourism. Indeed, some countries are less developed, but this is not true for the entire continent.

## 5.8 Opportunity: Diversification and Collaboration

There are many great opportunities available to address the challenges outlined above. The first is to diversify the tourism offering: destinations that have managed to maintain visitor numbers through low and shoulder seasons are those that have mastered diversification. By providing travellers with a plethora of options for each season, destinations can effectively market different offerings throughout the year. For instance, South Africa – through its tourism marketing arm South African Tourism – has created “traveller types” and segmented the country’s offerings to meet the needs of different travellers. Adventure seekers, for example, are invited to bungee jump over 200m at Bloukrans Bungee in the Western Cape or at the Soweto Towers in Gauteng. Wildlife lovers are advised to visit the expansive Kruger National Park. Culture lovers are encouraged to visit the many cultural villages across the country and to explore vibrant cities. Beachgoers are taught about the meeting of the two oceans – Atlantic and Indian – at Cape Point in the Western Cape and are invited to explore Durban for the warm Indian Ocean waters or Cape Town for the Atlantic.

Collaboration across countries and even between regions in Africa has the potential to create unique tourism opportunities. Multi-country itineraries diversify travellers’ holidays, while ensuring that visitors to Africa can spend most – if not all – of their vacation on the continent. They can also eliminate the pressure some travellers feel – that they must choose one African country to visit for their holiday – by enabling them to visit several.

Our research reveals that tour operators are often questioned about cross-country itineraries and are willing to create them, provided the requisite infrastructure exists. Such itineraries would require good transport connectivity between African states and be further facilitated by visa solutions that allowed one visa to be used for entry to multiple countries. Resolving larger connectivity issues in the region would also facilitate multi-destination itineraries, as chartering jets currently makes some itineraries far too expensive. Tour operators say that a route between Victoria Falls and Nairobi, for example, would make a significantly positive impact on their client itineraries.

These collaborations must be supported by effective and strategic marketing efforts that leverage digital solutions and help dispel negative perceptions and stereotypes about the region. The lack of international understanding of Africa forces African destinations to educate travellers on African geography and infrastructure in order to market their offering.

These cross-country connections and collaborations would also benefit African travellers who already have an understanding of the continent and its geography. Immense opportunities exist in the intra-African market. Travellers from within Africa and the diaspora are more likely to be repeat visitors and to travel beyond tourism hotspots, thus extending the value Travel & Tourism offers into lesser-known locations and rural communities.

MICE tourism also creates great opportunities for international travellers to explore Africa and increases the likelihood that they will return for a leisure trip. The rise of blended travel (which combines business and leisure travel) provides exciting opportunities for destinations with the infrastructure to host conferences. Sports tourism is also a vehicle through which destinations can promote themselves internationally and to highlight their infrastructure. The industry was valued at US\$587.9 billion in 2022<sup>46</sup> and is anticipated to expand at annual rate of 17.5% (CAGR) from 2023 to 2030. The Basketball Africa League (BAL)<sup>47</sup> is a good example of this growth. A collaboration between the NBA and the International Basketball Federation (FIBA) comprising 12 teams from all over Africa, the BAL has drawn crowds of basketball lovers into African destinations they may not otherwise have explored. Most recently, the league was hosted in Rwanda in May 2023.





## 6. UNLOCKING THE OPPORTUNITY

If the aforementioned challenges are tackled head on and the opportunities identified are seized, Travel & Tourism in Africa is likely to outperform its current trajectory. To capture the possible impact of such a conducive environment to growth, WTTC carried out a scenario analysis which estimated the impact of a policy package on the sector.

The policy package adopted in the model focused on three key pillars:

- Investing to improve Africa's enabling environment and air infrastructure.
- Implementing best practice for visa facilitation across Africa.
- Implementing auxiliary tourism marketing activity for Africa as a destination over a defined period.

The implementation of the policy package is estimated to improve the future spending of both domestic and international visitors. Under the new scenario, domestic visitor spending by 2033 is expected to be US\$14 billion higher than the current trajectory and the uplift in international visitor spending is predicted to be US\$25 billion higher.

This will, in turn, boost the sector's total contribution to Africa's GDP and employment, as shown in Figure 8 and Figure 9 below. By 2033, adopting the policy package will raise the forecast annualised growth rate for Travel & Tourism contribution to GDP in Africa from 5.1% under the current trajectory to 6.5%. The absolute increase in the sector's contribution to GDP by 2033 as a result of the policy package is estimated to be US\$50 billion, leading to a total of US\$350 billion. Much of this increase is likely to be in Sub-Saharan Africa as it is expected to benefit from an uplift of around US\$31 billion as opposed to an uplift of around US\$19 billion in North Africa. The same is true for the sector's contribution to jobs. The number of new jobs created by the sector by 2033 in Africa is estimated to increase by 6 million due to the policy package for the total of 42.4 million. The upward revision of roughly 4.9 million jobs in Sub-Saharan Africa is higher than the increase of 1.2 million jobs in North Africa.

**US\$50bn**

Increase to Real GDP by 2033, as a result of the policy package specified. Most of this increase comes from Sub-Saharan Africa (+\$31 billion), compared to North Africa (+US\$ 19 billion)

**6mn jobs**

Generated in Travel & Tourism by 2033. Most of this increase comes from Sub-Saharan Africa (+4.9 million), compared to North Africa (+1.2 million).

Figure 7: Total Travel & Tourism contribution to GDP, baseline vs upside forecast scenario

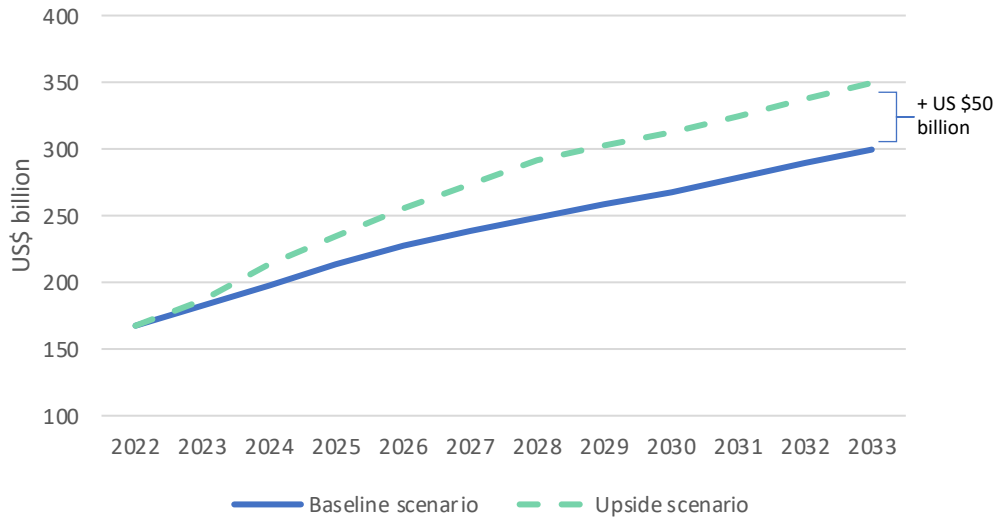
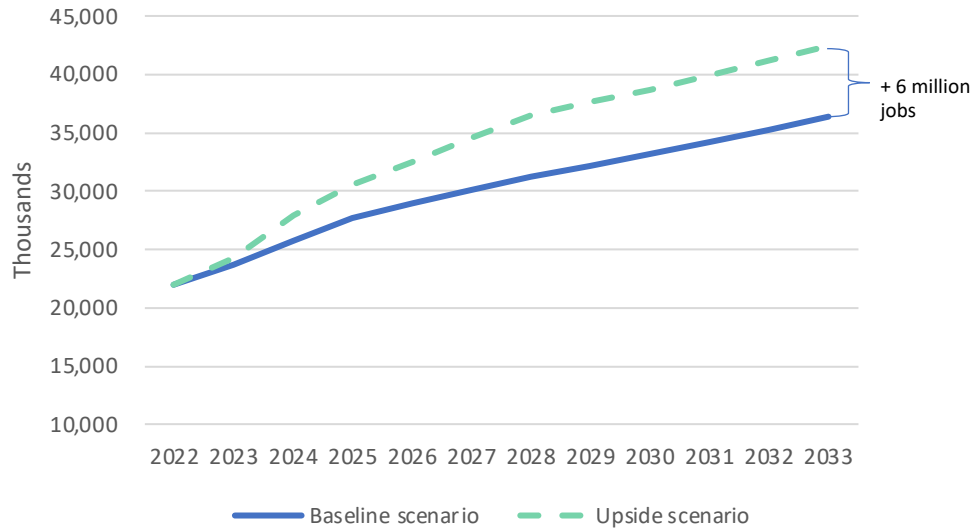


Figure 8: Total Travel & Tourism contribution to employment, baseline vs upside forecast scenario



# CONCLUSION

**Like most regions, challenges exist in the African Travel & Tourism landscape.** But through effective investments, collaborations, and implementation of best practice, the sector could see immense future growth.

Indeed, some solutions such as improved infrastructure and connectivity will require significant investment and time to implement, other solutions can be actioned in the short-term. This includes harnessing the power of collaboration with neighbouring states to support skills transfer and more varied itineraries.

**Africa's potential is immense.** Not only can investors benefit from a growing Travel & Tourism economy, local people can benefit from tourism in the form of work and the protection of their natural environment. Moreover, tourism can positively contribute to the conservation of wildlife and biodiversity.

## APPENDIX

Country Code	Country
AGO	Angola
BDI	Burundi
BEN	Benin
BFA	Burkina Faso
BWA	Botswana
CAF	Central African Republic
CIV	Côte D'Ivoire
CMR	Cameroon
COD	Democratic Republic of Congo
COG	Congo
COM	Comoros
CPV	Cabo Verde
DZA	Algeria
EGY	Egypt
ETH	Ethiopia
GAB	Gabon
GHA	Ghana
GIN	Guinea
GMB	Gambia
KEN	Kenya
LBY	Libya
LSO	Lesotho
MAR	Morocco
MDG	Madagascar

Country Code	Country
MLI	Mali
MOZ	Mozambique
MUS	Mauritius
MWI	Malawi
NAM	Namibia
NER	Niger
NGA	Nigeria
REU	Reunion
RWA	Rwanda
SDN	Sudan
SEN	Senegal
SLE	Sierra Leone
STP	Sao Tome and Principe
SWZ	Eswatini
SYC	Seychelles
TCD	Chad
TGO	Togo
TUN	Tunisia
TZA	Tanzania
UGA	Uganda
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

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