Achieving sustainable tourism growth and development in Sub-Saharan Africa: What is the missing link?

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ABSTRACT
International tourism is currently the largest and one of the rapidly expanding economic sectors in the world, growing at an average annual rate of 4%. However, Sub-Saharan Africa (SSA) remains the least travelled sub-region in the world, with the least share of the world tourism market. This is despite its rich endowment with a diversity of both natural and human-made attractions. Therefore, the major research question that the study sought to answer was: What is the missing link? In other words, what can Sub-Saharan Africa do to stimulate its tourism industry? To what extent are public sector bodies in SSA involved in facilitating sustainable tourism growth and development, and increase their global market share. Specifically, the study investigated the existence of tourism policies; the state of tourism infrastructure; and the existence of marketing strategies. The study was justified on the premise that tourism is one of the lucrative industries that could contribute towards generating government income, creating jobs; and alleviating poverty in SSA. Second, the study was deliberately timed to coincide with the hosting of the 2013 United Nations World Tourism Organization General Assembly by Zambia and Zimbabwe. The geographical scope of the study was confined to that part of Africa south of the Sahara Desert. The study was based on secondary data sources from the following organizations: United Nations World Tourism Organization (UNWTO), World Travel and Tourism Council (WTTC), World Tourism Barometer, Euro-monitor International, Regional Tourism Organization of Southern Africa (RETOSA), as well as relevant books and papers. The study found that, while the majority of SSA countries had tourism policies and strategies, the tourism industry suffered from inadequate policy implementation; poor or inadequate tourism infrastructure; and lack of aggressive marketing. The study also found that, in general, SSA suffered from a poor image. The study concluded that, while the tourism industry is predominantly in the hands of the private sector, the fledgling state of tourism in SSA necessitated direct intervention by the public sector. Thus, the study recommends that public sector bodies, the private sector, and local communities should work in partnership in formulating and implementing sustainable tourism policies; developing and maintaining tourism infrastructure, formulating and implementing comprehensive marketing strategies; and work towards improving the largely negative image of the sub-region.

Key words: tourism infrastructure, market share, policies, marketing strategies, image.

Background
According to the United Nations World Tourism Organization (UNWTO) (2008), tourism is currently the world’s largest industry and one of the most rapidly expanding economic sectors in the world, with annual revenues of over US$3 trillion. In 2008, for example, there were over 922 million international tourist arrivals, with a growth of 1.9% as compared to 2007, and was expecting this figure to reach 1.5 billion by 2020. It also gave the number of domestic tourist movements at several times more than international tourists, especially in the western countries. According to Tourism 2020 Vision, international tourism will continue to grow at the average annual rate of 4%.
In the first four months of 2013, international tourist arrivals grew by +4.3% to reach a total of 298 million (up by 12 million), despite a challenging global economic environment (UNWTO Barometer, 2013). Prospects for the current tourism peak season are positive, with 435 million tourists expected to travel abroad. This is primarily attributed to the advent of e-commerce in which tourism products have become one of the most traded items on the internet (UNWTO, 2013). International tourism receipts also grew to more than US$3 trillion in 2012, corresponding to an increase in real terms of 1.9% (UNWTO World Tourism Barometer, 2013).

The above results were positive in all regions of the world, with the strongest growth in Asia and the Pacific (+6%), Europe (+5%) and the Middle East (+5%). Growth was stronger in emerging economy destinations (+4.6%) compared to advanced economies (+3.3%), a trend which has marked the sector for many years now. By sub-region, South-East Asia (+12%), South Asia (+9%) and Central and Eastern Europe (+9%) were the star performers.

According to UNWTO (2013), Asia and the Pacific (+6%) saw the highest relative growth boosted by arrivals in South-East Asia (+12%) and South Asia (+9%). International tourist arrivals to Europe, the most visited region in the world, were up by +5%; described as “an excellent result” in view of the economic situation in the region. Central and Eastern Europe (+9%) continues to lead growth, while Southern and Mediterranean Europe (+5%) also turned in strong results. The weaker growth was in the Americas (+1%) and Africa (+2%). Africa (+2%) and the Americas (+1%) reported weak growth in the first four months of 2013, following the strong progress of 2012 (+6% and +5%, respectively). In Africa, the +3% growth in Sub-Saharan Africa contrasts with flat results in North Africa.

The +4.3% growth in the number of international tourists crossing borders in the first months of 2013 confirms that tourism is one of the fastest growing sectors of our times, contributing in a central manner to the economy of a growing number of countries. At macro level, tourism has increased national revenues and brought in foreign exchange. At micro level, it has created jobs, distributed revenue, contributed to rural development, alleviated poverty and improved the people’s general well-being (Bhatia, 2006). Opportunities for employment creation have been particularly impressive in service industries such as transportation as well as entertainment, particularly amusement parks, casinos, shopping malls, music venues and theatres. In the United States of America, for example, tourism has provided over six million jobs, making it the country’s largest employer (UNWTO, 2008).

However, international tourists have particular cities that they choose to visit. For example, Paris (France) usually receives most visitors, followed by London (United Kingdom), Singapore (Singapore), Antalya (Turkey), Kuala Lumpur (Malaysia), Hong Kong (China), New York (USA), Bangkok (Thailand), Istanbul (Turkey), and Dubai (United Arab Emirates) (UNWTO World Tourism Barometer, 2013).

**Research Problem**

Despite being endowed with a rich variety of both natural and socio-cultural attractions, Sub-Saharan Africa’s share of international tourist arrivals and receipts has largely remained very low compared with other regions of the world. For example, in 2006, international arrivals to the sub-region were only 5% of the world total (Mowforth and Munt, 2010). No Sub-Sahara African country featured among the top 20 most preferred tourist destinations. The only country from the sub-region that had a modest total of 9.5 million international tourist arrivals was South Africa (UNWTO, 2012). Similarly, during the
same year, only Cape Town featured among the top 150 city destinations of the world.

A number of strategies, including mass tourism, have been used to try and improve the performance of the tourism industry in the sub-region. However, SSA has remained the least travelled region in the world (Hudman and Jackson, 2012). It was this continued low performance of the tourism industry in SSA that prompted the researcher to investigate the missing link. What role are the governments of SSA playing?

Research Objectives

The main objective of the study was to investigate the extent to which public sector bodies in SSA were involved in facilitating sustainable tourism growth and development, and increasing their global market share in international tourist and revenue flows. Specifically, the study examined the existence of government tourism policies; the provision and state of tourism infrastructure; the existence of marketing strategies; and the areas that required additional attention to stimulate tourism in Sub-Saharan Africa.

Justification of the Study

The major justification of the study was that tourism has become one of the fastest growth industries of the world. Therefore, Sub-Saharan Africa was being encouraged to join the gravy train and enjoy the many benefits that continued to accrue from this lucrative industry, namely, its contribution to income generation and balance of payments, job creation, rural development, alleviation of poverty and improvement of the quality of life of citizens. Second, the study was deliberately intended to challenge African governments to begin to think beyond the 2013 United Nations World Tourism Organization Assembly. It is hoped that Sub-Saharan Africa will come up with strategies that would enable the sub-region to develop its potential, benefit from its many natural and human-made tourism attractions; and increase its market share.

Conceptual Framework

Need for public Sector Involvement

Although the tourism industry is mostly dominated by private sector enterprises, there are common but critical functions and responsibilities that must be performed by the public sector. According to Shaw and Williams (2002), in the field of tourism, the public sector, at its various levels, has an indispensable catalytic role to play in the sustainable growth and development of the tourism sector. Youell (2008) has been more specific by adding that the major functions of the public sector in the tourism industry include formulation of policies and enactment of legislation and regulations; provision and maintenance of tourism attractions, infrastructure, facilities, and related services; coordination of information services for destination promotion; and the creation of a favorable image of the tourism destination. Of course, these roles may vary from one country to another. Shaw and Williams (2002) also stated that a policy is the starting point for public sector involvement in any sector, including tourism.

What is the public sector?

According to Eliot (1997), the term public sector refers to a whole range of voluntary public organizations whose motives are not necessarily profit maximization, but the provision of services to the general public at affordable costs. Swarbrooke (1999) added that they are bodies that are intended to represent the whole citizenry; act on behalf
of the totality of the population; and spend the revenue from taxation to implement policies and projects that benefit the populations over which their jurisdictions have authority. Public sector bodies range from international organizations such as the United Nations World Tourism Organization (WTO), to full-fledged government ministries and departments, as well as bureaus at both national and sub-national levels.

**Why Involve the Public Sector?**

It was against the above functions or indicators that this study set out to assess the involvement of the public sector in sustainable tourism growth and development in Sub-Saharan Africa.

**Research Methodology**

The study was primarily based on secondary data sources as well as personal observations. Secondary data were sourced from the United Nations World Tourism Organization (UNWTO), World Travel and Tourism Council (WTTC), World Tourism Barometer, Euro-monitor International, as well as the Regional Tourism Organization of Southern Africa (RETOSA). Books, published and unpublished reports and periodicals, as well as the internet were also used as sources of information for this paper. Some observations were made after visits to Botswana, Ethiopia, Kenya and South Africa.

**Research Findings and Discussions**

**Tourism policies and legislation**

The study found that, while a number of governments in Sub-Saharan Africa, at both national and sub-national levels, were involved in tourism development. However, many countries did not have sub-national policies and, indeed, regulations. The study revealed that the majority of countries that had not yet formulated tourism policies were those in the Central African region, including Angola, Burundi, Chad, Central African Republic, Democratic Republic of Congo (DRC), Eritrea, Guinea Bissau, Mauritania, and Somalia.

The study also found that, instead of tourism policies, some countries had tourism strategies as well as sections on tourism development within their national development plans. In Ethiopia, for example, the study found that the Government blue print known as the *Plan for Accelerated and Sustained Development to End Poverty (PASDEP)*, had articulated a number of objectives and intentions for developing the country’s tourism industry. Thus, the study regarded this as an important starting point for public sector involvement in the tourism sector.

In reference to the critical need for a tourism policy, Shaw and Williams remarked that tourism does not just happen as if by magic. Somebody must make it to happen! Youell (2008) added that policy is the starting point for public sector involvement in any sector, including tourism. He went on to say that it is a pre-requisite that public sector bodies use to establish a framework within which the industry should be developed.

A policy also sets out the *objectives and priorities* for the development of the sector. According to Cooper et al (2008), tourism policy objectives were necessary to clearly indicate why a particular country was interested in developing its tourism industry, that is, whether economic, socio-cultural, environmental, etc. In the majority of cases, the objective is economic because tourism has become one of the major world growth industries that generate income; increase foreign currency earnings; help balance of payments; create employment; facilitate rural development; and have many multiplier effects.
Legislation and Regulations

The study found that, while several countries had tourism policies in place, they had not yet enacted laws and regulatory instruments to restrict some potentially destructive tourism activities, particularly in specific fragile ecosystems. Others such as Ethiopia, Kenya and Zimbabwe had difficulty in implementing their laws, particularly those to do with environmental impacts of tourism development projects.

According to Page (2005), to facilitate the implementation of tourism laws and regulations, the general public should be involved in the conception and enactment of laws and regulations. This is to facilitate the resolution of conflicts of interest that may arise, particularly where the private sector has been left unchecked. According to Bhatia (2006), among the laws that may be enacted are those that are concerned with consumer protection, registration of tourism operations, grading of attractions and accommodation, licensing of travel agencies and tour operators, training of tour guides, and restrictions on transport in certain fragile areas (Bhatia, 2006).

Types of Tourism

The study found that most existing policies in Sub-Saharan Africa, except in countries like Botswana and Ethiopia, were silent on the types of tourism preferred by respective countries. In emphasizing the significance of a tourism policy, Shaw and Williams (2002) stated that the policy is necessary in order to spell out the types of tourism a country prefers; the type of tourists it is seeking to attract or encourage; the types of tourism development that are likely to be frowned upon; as well as the extent to which domestic and international tourism, or both, can be developed. Thus, it is critical for tourism policies to indicate whether the country favours “high quality, high spending” tourists or mass tourism (Youell, 2008). Botswana and Ethiopia are among the countries of Sub-Saharan Africa that prefer “low-impact, high-value” tourism. This is primarily because both countries have climates that are predominantly semi-desert.

Rate of Tourism Growth

The study found that most Sub-Saharan African countries tended to develop their tourism industries without any effective planning controls. In fact, the study found that, since the 1970s, a critical challenge of many Sub-Saharan African countries has been the rapid growth and unplanned development due to the spread of mass tourism. For example, the study found that, in the fragile and sensitive landscapes of the coastal regions of East Africa, rapid development of tourism facilities, at too large a scale, was destroying the very ambience that promotes tourism in the first place. In Kenya in particular, because of mass tourism being promoted by the private sector, delicate ecologies were being destroyed through the illegal collection of shells and coral reefs. Similarly, raw sewage from coastal hotels was degrading Kenya’s coral reefs.

On this issue of unplanned development, Gilmour (2008), unplanned tourism growth and development is unsustainable as it often results in an unattractive sprawl of hotels and related facilities. Thus, the preferred rate of tourism growth is a critical objective because an excessive sprawl of unattractive tourist facilities can easily take away from the scenic qualities of a destination, resulting in tourism growth and development that is not in harmony with the physical environment. It should be realized that there is a symbiotic relationship and mutual dependency between tourism and its physical environment.

Social Objectives

The study also found that the influx of large numbers of tourists into some countries of Sub-
Saharan Africa was beginning to have negative social impact among the youth. The study found that, in the affluent parts of Addis Ababa, Cape Town, Gaborone and Nairobi, the youth were beginning to exhibit changes in their cultural values, not necessarily for the better. On the positive side, however, some countries, such as Nigeria, Swaziland and Zimbabwe, were found to be using tourism to encourage social and cultural contacts with outsiders. The study viewed this as an important aspect of any policy as it ensured that tourists respected local traditions and norms.

According to Mpofu (2009), international tourism may contribute greatly towards the broadening the limits of human knowledge and the sometimes more conservative stereotypes, thereby creating a better understanding and respect for one another’s values, cultures and traditional norms. Thus, by virtue of its basic element of movement, tourism is an important medium for interaction and communication between different civilizations, as well as for cultural exchange and goodwill.

**Provision and maintenance of tourism attractions and infrastructure**

The study found that one of the factors militating against sustainable tourism growth and development in Sub-Saharan Africa is the inadequately developed and maintained tourism infrastructure, especially national parks, roads, transport terminals, historical monuments, museums, historic buildings, art galleries and leisure centers. The study also revealed that there were limited numbers of tourist facilities that met international standards. These included the quality air network transport, hotels, and restaurants.

**Connectivity and Accessibility**

The study further noted that several government development plans contained a number of intentions to develop tourist destinations and facilities, including physical planning in the areas around attractions. However, the study found that there was very little evidence on the ground. The study specifically noted that transportation within Sub-Saharan Africa was generally poor and infrequent. In some cases, little or no air travel connections exist, thus making travel to and from the world tourist markets extremely difficult, non-existent or circuitous at best. The attention of the study team was drawn to a sad case of a certain Zimbabwe soccer team that had to fly out of Africa to Dubai in the Arab Emirates, in order to go to Algeria in Africa. Similarly, a tourist who wishes to drive to the Victoria Falls from Kariba, has to come down to Harare, continue to Bulawayo, and then drive up to the Falls.

According to Youell (2008), improvements in transport technology – by land, sea or air – are critical in speeding up travel and reducing costs, thereby encouraging and increasing tourism demand. According to Cooper et al. (2008), there can be very little travel if there were no links between continents, countries and within countries themselves. Thus, if tourist attractions are located at places where no regular and direct transport is available, the attractions may become of very little value. Thus, accessibility is the means by which a tourist can reach the area where attractions are located.

We can, therefore, say that it is important to recognize that adequate, direct and efficient links between countries, as well as comfortable and inexpensive means of connectivity are critical to the sustainable growth and development of a thriving tourism industry.

**Attractions**

The study found that most attractions in Sub-Saharan Africa did not offer a diverse package of products to the tourist. This means that, to be a viable tourism destination, there is need to establish and develop other related attractions and recreational activities within that vicinity to capture the interests of tourists.
In support of this concern, Youell (2008) remarked that a tourism destination is not just one place, but a combination of natural attractions such as sunshine, landforms, wildlife, and scenic beauty, as well as human-made attractions like historical monuments, museums, art galleries, sporting facilities, etc. This is because interests and tastes vary from one tourist to another.

**Marketing Strategy and Information Provision**

The study revealed that most countries of Sub-Saharan Africa had either no marketing strategies or they only existed on paper. The study found that the major limiting factors to tourism marketing were:

a) Lack of national tourism coordinating organizations (NTOs);

b) Shortage of skilled or trained manpower;

and,

c) Limited budgets for promotion.

The study also found that, while some governments had blue prints containing long and impressive wish lists of intentions, very little training or upgrading of the general quality of hotel management and service standards had been carried out.

Commenting on the need for a strong marketing approach, Bhatia (2006) warned that tourism was one of the world’s most competitive industries and that the competition was constantly growing as more companies and destinations seek to attract more tourists. Therefore, Sub-Saharan Africa should realize that, because a tourist has an immense variety of choices, they should make tourism marketing an established tourism management strategy.

Similarly, successful tourism marketing requires that there be a national tourism organization (NTO) whose primary role is to coordinate different bodies that are involved in the industry. According to Kotler (1999), the central responsibility of an NTO is carry out marketing research, develop and implement a tourism marketing strategy, produce tourist promotional material, promote the country as a viable tourist destination, arrange travel and trade activities, assess present and future human resources needs, and provide advisory and training services to raise standards within the industry. We can thus say, through such a coordinating body, the needs and wants of target markets can be constantly determined and the desired satisfactions delivered more efficiently and effectively than one’s competitors.

The study concludes this section by drawing the attention of Sub-Saharan Africa to the massive growth in travel agencies and tour operators. These can be roped in and encouraged to sell all-inclusive package holidays at relatively low costs.

**Image of the Sub-Region**

The study revealed that, despite the potential of Sub-Saharan Africa to attract international tourists, the sustainable growth and development of tourism in several Sub-Sahara African countries was constrained by the negative image of the sub-continent on the international scene. The study noted that international media, particularly in the major tourist source markets, tended to focus on the dark side of Sub-Saharan Africa, namely, drought, famine, and wars. Therefore, it is the view of this study that creating a favorable political image of any country is a direct role and responsibility of the public sector.

The significance of a tourism destination image is reflected in several literature concerned with the marketing of a place. According to Mpofu (2009), buying a holiday is a high-risk decision because the tourism industry is a highly sensitive sector that involves the movement of live humans, not goods or commodities. Shaw and Williams have added that it is an industry that does not only respond to the presence of unique attractions but, also, to relationships between tourists and destination areas; or consumers and producers of tourist experience.
According to the UN World Tourism Organization (1979), a positive image is a critical component in the development of a prosperous tourism industry. Murphy (1985: 25) stated that the phrase tourist destination image was so catholic and had assumed such wide currency within tourism literature that it was now taken to mean “the sum of beliefs, ideas and impressions that people, individually and collectively, had regarding each tourist destination”. This is regardless of whether tourists come from the west or east – they are all humans, influenced by images of and activities at each tourist destination area. Shaw and Williams (2002) have also added that an image embraces the ideas and conceptions held individually or collectively of a destination.

Conclusion and Recommendations

Conclusion

In view of the above findings and observations, the main conclusion of the study, therefore, is that there is ample justification for direct public sector intervention at both national and sub-national levels. However, to achieve sustainable tourism growth and development, it is imperative for public sector intervention to be preceded by a tourism policy framework. Thus, we conclude that, to a very large extent, lack of tourism policies, and their implementation, has been a major factor in stifling the sustainable development and growth of tourism in Sub-Saharan Africa. We, therefore, submit that a tourism policy is a pre-requisite that establishes a framework within which the development of a successful tourism industry can take place. Similarly, the existence of a tourism policy is critical in informing potential investors about the conditions governing their investments, including the need to respect the country’s social and physical environments.

Recommendations

On the basis of the above conclusion, the study recommends that there be direct involvement by the public sector bodies, at both national and sub-national levels. While the private sector should remain the engine of tourism growth, the involvement of the public sector is justified on the fact that the industry is still at its infancy in Sub-Saharan Africa, and, therefore, still needs careful nursing.

To realize the full benefits of this industry, the study further recommends that Sub-Sahara African governments should develop and maintain their tourist infrastructure and related facilities and services, and ensure that they meet international standards. This could be better done within the framework of partnerships with other stakeholders, particularly the private sector.

In some countries of Sub-Saharan Africa, the study recommends the urgent establishment and/or strengthening of national and sub-national tourism organizations (NTO). These are critical entities in tourism destination development as well as in coordinating and promoting tourist information services. They are critical also in ensuring that desired tourism products are delivered more effectively and efficiently, in the right place, at the right time and at the right price than by competitors.

Finally, the study calls upon the public sector bodies in Sub-Saharan Africa to ensure that their industries operate within the principles of sustainability. This calls for policies that ensure that local people have an equitable share in the economic benefits of tourism, and that the industry is developed in harmony with the physical environment.
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