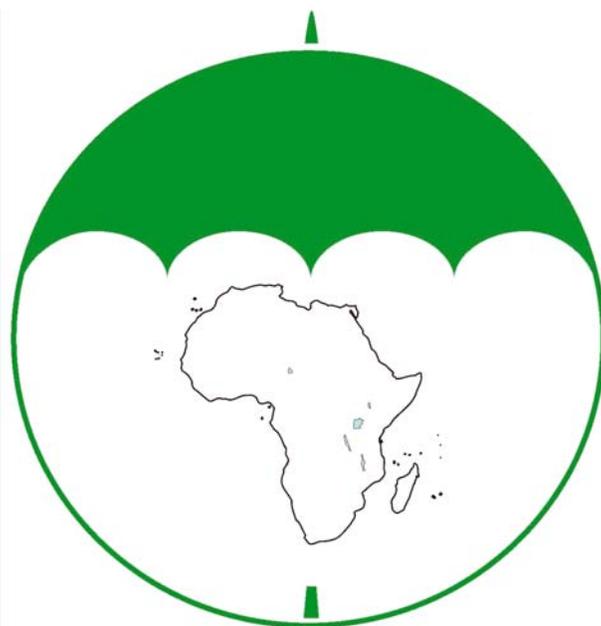


Sector Standardization Needs Review #9-3



Sustainable Tourism in Africa: Standards as Essential Catalysts

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Introduction

Tourism being the movement of people (residents) traveling outside their normal residential environment/area for the purposes of recreation, leisure, religious, family or business, etc., usually for a limited duration time for not less than 24 hours and not exceeding 365 days (1 consecutive year). It's one of the world's largest economic sectors and is especially well-placed to promote sustainable development.

Through consumption of local products such as accommodation, restaurants and food markets, attraction sites and additional expenditures outside the traditional tourist product, tourists stimulate demand for agriculture, fisheries, food processing, and light manufacturing products, such as the garment industry, as well as for handicrafts and the goods and services of the informal sector. Estimates of such expenditures vary according to the local circumstances but can range from half to nearly double expenditures in tourist accommodation. Similarly, tourism can act as a catalyst for the development of small businesses in related production and service sectors. Notably, tourism can provide an economic base for a region whose only development options are its cultural and natural resources, whether coastal, mountain, or wildlife or a combination of these (World Bank Tourism Report, 2013). This Note examines the role of tourism in ensuring economic, environmental, and cultural sustainability, poverty alleviation, and social inclusion (Iain et al, 2001).



Sustainable Tourism in Africa: Standards as Essential Catalysts

1. Tourism in African Economies

Tourism is a principal export for many African countries and a significant source of foreign exchange. Christie *et al.* (2014) report that tourism is a powerful vehicle for economic growth and job creation all over the world being directly and indirectly responsible for 9.4 percent of the world's jobs (277 million); 9.8 percent of the world's GDP (US\$7.6 trillion); 5.7 percent of the world's exports (US\$1.4 trillion); and 4.3 percent of the world's investment (US\$814.4 billion) (WTTC, 2015s). With respect to the contribution of tourism to Africa's economies, the World Travel & Tourism Council (WTTC) and the United Nations World Tourism Organization reports provide the data indicated in Table 1:

Table 1: Top 20 Tourism Earners (by Total Contribution to GDP) in Africa, 2014

Country	GDP contribution US\$ Billions			Employment contribution		Investments US\$ Billions	Arrivals
	Direct	Total	% Total	Direct	Total		
Africa	74.7504	170.7	8.5	8,352,801	19,698,000	26.73	65,311,000
Morocco	8.6	19.1	17.9	775,500	1,740,500	3.8	10,282,000
Egypt	16.5	36.0	12.8	1,322,700	2,944,100	4.3	9,628,000
South Africa	10.5	32.9	9.4	679,500	1,497,500	5.6	9,549,000
Tunisia	3.6	7.4	15.2	230,500	473,000	0.8	6,069,000
Algeria	7.9	15.2	6.7	332,500	660,000	2.0	3,116,400
Kenya	2.5	6.4	10.5	206,500	543,500	0.8	1,148,690
Tanzania	1.8	5.1	14.0	467,000	1,337,000	1.1	1,199,120
Ethiopia	2.1	4.7	9.3	979,000	2,291,500	0.6	676,598
Mauritius	1.4	3.3	25.5	60,200	134,000	0.2	1,039,000
Ghana	1.1	2.6	6.7	122,000	298,500	0.2	877,825
Uganda	1.1	2.5	9.9	247,100	592,700	0.3	1,174,428
Cameroon	0.9	1.9	6.2	124,000	281,000	0.2	574,128
Senegal	0.8	1.8	11.3	132,700	305,900	0.1	956,556
Botswana	0.7	1.8	8.5	32,000	69,500	0.2	2,585,280
Namibia	0.3	1.7	14.9	24,000	102,300	0.4	1,078,074
Zambia	0.7	1.5	6.1	29,300	83,300	0.1	975,611
Zimbabwe	0.7	1.4	10.4	181,000	426,200	0.1	1,880,000
Mozambique	0.5	1.1	7.0	262,500	710,500	0.2	2,052,361
Rwanda	0.3	0.7	9.1	66,000	176,200	0.2	964,264
Swaziland	0.1	0.1	4.1	5,200	12,300	0.0	1,111,334

Sources: UNWTO and WTTC country specific reports (UNWTO, 2015); (WTTC, 2015i); (WTTC, 2015d); (WTTC, 2015n); (WTTC, 2015q); (WTTC, 2015a); (WTTC, 2015g); (WTTC, 2015p); (WTTC, 2015e); (WTTC, 2015h); (WTTC, 2015f); (WTTC, 2015r); (WTTC, 2015c); (WTTC, 2015m); (WTTC, 2015b); (WTTC, 2015k); (WTTC, 2015t); (WTTC, 2015u); (WTTC, 2015j); (WTTC, 2015l); (WTTC, 2015o)

Africa accounted for about 5.8 % of the 1133 million international tourist arrivals and 3.5 of the US\$1245 billion international receipts in 2014 (UNWTO, 2015). Growth in tourism arrivals was characterized by weak increase, stagnation in popular destinations and decreases in countries affected by political uncertainties and incidences of terrorism. UNWTO (2015) makes particular mention on destinations in Africa which posted notable performance namely: Côte d'Ivoire (+24%), Madagascar (+13%), Mauritius (+5%), Zimbabwe (+3%) and the Seychelles (+1%).

If managed sustainably, tourism is an effective development tool. When tourism's environmental, social, and economic and other constraints are addressed, tourism energizes economies. With the full knowledge that tourism is a complex sector with tentacles into a myriad of other economic activities, all of which require careful management, countries with tourism assets are fully justified to be considered as sustainable development pillars that can facilitate development and empowerment in Africa (Christie *et al.*, 2014). Tourism's main comparative advantage over other

sectors is that visitor expenditures have a “flow-through” or catalytic effect across the economy in terms of production and employment creation.

Furthermore, tourism’s catalytic effect on an economy and its multi-sectorial nature is also a reason for its complexity. Tourism is dependent for its success on numerous actors, both domestic and international, with very different interests in the sector, including, in most cases, the international visitors that determine its success (Christie *et al.*, 2014). According to the UNWTO, tourism can play a role in creating a brighter future, where the world’s entire population has access to modern, efficient and affordable services.

2. Rationale for Developing Tourism in Africa

Christie *et al.* (2014) outline the reasons why developing tourism in Africa is important. They provide case studies from many parts of the world where the development of tourism has had positive impacts. While it is recommended to read the full report, the following is a summary of the rationale for developing tourism extracted from the report for purposes of this briefing.

2.1 Spur Economic Development: As well as its direct economic impact, the sector has significant indirect and induced impacts. The WTTC takes cognizance of Travel & Tourism's total contribution with broader view capturing its indirect and induced impacts through its annual research (WTTC, 2015s):

- (a) **The direct contribution** of Travel & Tourism to GDP reflects the ‘internal’ spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government ‘individual’ spending — spending by government on Travel & Tourism services directly linked to visitors, such as cultural (e.g., museums) or recreational (e.g., national parks). The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by ‘netting out’ the purchases made by the different tourism industries, consistent with the 2008 *Tourism Satellite Account: Recommended Methodological Framework* (UN, 2010).
- (b) **The total contribution** of Travel & Tourism includes its ‘wider impacts’ (i.e., the indirect and induced impacts) on the economy. The ‘indirect’ contribution includes the GDP and jobs supported by:
 - (i) Travel & Tourism investment spending — an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
 - (ii) Government ‘collective’ spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the ‘community at large’ — e.g. tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc.;
 - (iii) Domestic purchases of goods and services by the sectors dealing directly with tourists — including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.
 - (iv) The ‘induced’ contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism sector.

2.2 Create Good Jobs: UNGA (2012) emphasizes that well-designed and managed tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors and can create decent jobs and generate trade opportunities. More than 200 million people are underemployed in Sub-Saharan Africa, and 10 million more seek jobs every year. As tourism grows, the sector’s job creation and income-generating potential rises exponentially. Tourism compares well with other sectors regarding the opportunities for small and medium enterprise (SME) development, career advancement, and lifelong learning potential. In Sub-Saharan Africa 1 in 20 jobs is already in travel and tourism. Tourism is also a more efficient

job creator than many other sectors due to the multiple downstream effects. A study in Zambia by the Natural Resources Consultative Forum found that a \$250,000 investment in the tourism sector generates 182 full-time formal jobs. This is nearly 40 percent more than the same investment in agriculture and over 50 percent more than in mining.

2.3 Build Remote and Developing Regions: Tourism is growing faster in the world's emerging and developing regions than in the rest of the world. International arrivals in developing countries grew an average of 11 percent a year between 1990 and 2009 (UNDP, 2011). The market share of emerging economies increased from 30% in 1980 to 45% in 2014, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals (UNWTO, 2015).

2.4 Accelerate Reform: Tourism accelerates policy and economic reforms that can support SME development and stimulate foreign investment. In Cabo Verde, tourism took off when the banking sector was reformed, when the escudo was pegged to the euro, and when an attractive package of investment incentives was created. In Rwanda, significant improvements in Doing Business indicators were linked to the desire to increase gorilla tourism. Across Sub-Saharan Africa, destinations are finding that political stability, good governance, and an enabling business environment provide the foundation for tourism growth (UNCTAD & UNDP, 2008).

2.5 Improve Infrastructure: In an effort to attract visitors, governments and private sector business people often invest in infrastructure improvements that have positive impacts on the economy and on rural communities. For some years hotel managers worldwide have reached out to their surrounding communities to improve the health and welfare of their workers but also to ensure that local people prize the benefits that tourists can bring them, thus protecting tourists from potential resentment of the much poorer local people.

2.6 Increase Domestic Consumption and Diversify Exports: Tourists create demand for goods and services such as transport, petro-fuels, retailing, finance, real estate, agriculture, and communications. The WTTC expected tourism to generate twice as much from indirect spending on non-tourism goods and services and from induced supply chain benefits as from direct tourist spending in 2011 (WTTC 2011).

2.7 Empower Women, Young People, and Marginalized Populations: Globally, tourism is one of the few economic sectors in which women outnumber men in certain positions and are paid the same. In Africa, a 2010 study by the United Nations World Tourism Organization (UNWTO) and UN Women found that 31 percent of employers in the hotel and restaurant sector were women (UNWTO 2011), compared with 21 percent in other sectors. Young people also derive productive employment from tourism. By engaging young people in productive employment, tourism can provide an alternative to out-migration, urban poverty, and armed conflict.

2.8 Preserve Cultural Heritage and Conserve the Environment: Tourism creates additional value for historic buildings, heritage sites, and the fine and performing arts. Cultural heritage is under threat across Sub-Saharan Africa, but tourism provides a source of revenue for its protection. UNGA (2012) recognizes the need to support sustainable tourism activities and relevant capacity building that promote environmental awareness, conserve and protect the environment, respect wildlife, flora, biodiversity, ecosystems and cultural diversity, and improve the welfare and livelihoods of local communities by supporting their local economies and the human and natural environment as a whole.

2.9 Promote Public-Private Partnerships: Effective tourism planning requires collaboration and partnerships between public and private sectors. Consultation enables participants to take joint responsibility for policy choices, facilitates the collection of economic data, and has positive outcomes for national planning. Public-private partnerships in conservation, infrastructure development, and investment promotion have been used in Sub-Saharan Africa for many years.

2.10 Improve the National Image: Successful tourism can change external perceptions of a country, improve intercultural understanding, and create a positive internal frame of reference for a country. Once war-torn, Rwanda has changed its image because it features mountain gorilla conservation and tourism. With civil strife in the past, Mozambique is now known for its attractive beach resorts.

3. Pillars of Travel and Tourism Competitiveness Index

First compiled in 2007, the Travel & Tourism Competitiveness Index (TTCI) measures “the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and competitiveness of a country” (WEF, 2015). The TTCI framework is represented in Figure 1. The index has four sub-indexes with fourteen pillars. A summary of the index is presented here for ease of reference while readers are requested to access the full *Travel and Tourism Competitiveness Report 2015* for detailed review.

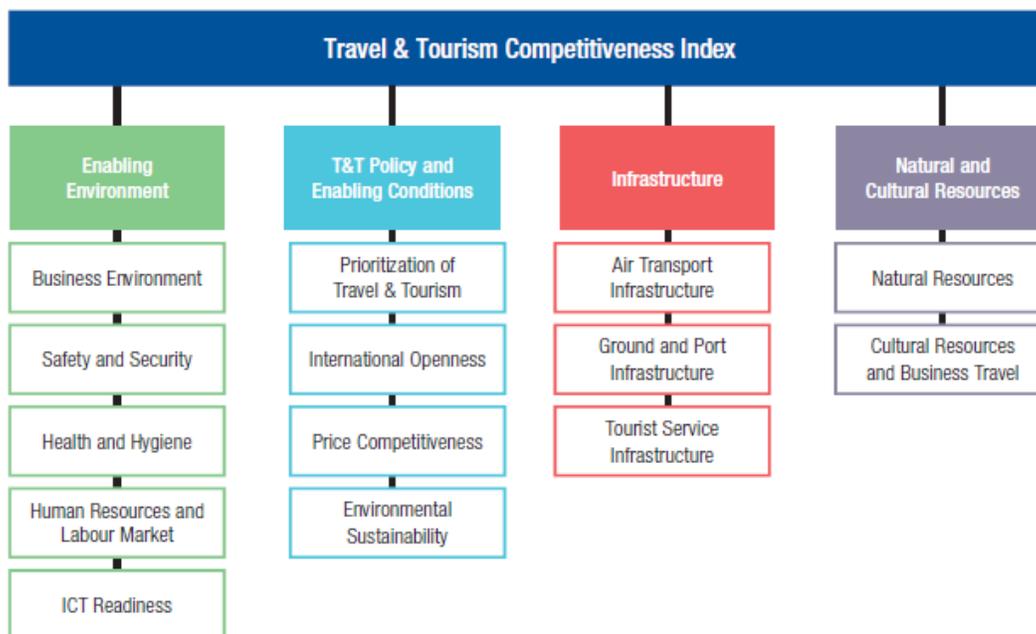


Figure 1: The T&T Competitiveness Index 2015 framework (WEF, 2015)

3.1 Sub-Index A: Enabling Environment

Pillar 1: Business Environment

- 1.01 Property rights
- 1.02 Impact of rules on FDI
- 1.03 Efficiency of legal framework in settling disputes
- 1.04 Efficiency of legal framework in challenging regulations
- 1.05 Time required to deal with construction permits
- 1.06 Cost to deal with construction permits
- 1.07 Extent of market dominance
- 1.08 Time required to start a business
- 1.09 Cost to start a business
- 1.10 Extent and effect of taxation on incentives to work
- 1.11 Extent and effect of taxation on incentives to invest
- 1.12 Total tax rate

Pillar 2: Safety and Security

- 2.01 Business costs of crime and violence
- 2.02 Reliability of police services
- 2.03 Business costs of terrorism
- 2.04 Index of terrorism incidence
- 2.05 Homicide rate

Pillar 3: Health and Hygiene

- 3.01 Physician density
- 3.02 Access to improved sanitation
- 3.03 Access to improved drinking water

- 3.04 Hospital beds
- 3.05 HIV prevalence
- 3.06 Malaria incidence

Pillar 4: Human Resources and Labour Market

Qualification of the labour force

- 4.01 Primary education enrolment rate
- 4.02 Secondary education enrolment rate
- 4.03 Extent of staff training
- 4.04 Treatment of customers

Labour market

- 4.05 Hiring and firing practices
- 4.06 Ease of finding skilled employees
- 4.07 Ease of hiring foreign labour
- 4.08 Pay and productivity
- 4.09 Female labour force participation

Pillar 5: ICT Readiness

- 5.01 ICT use for business-to-business transactions
- 5.02 Internet use for business-to-consumer transactions
- 5.03 Individuals using the internet
- 5.04 Broadband internet subscribers
- 5.05 Mobile telephone subscriptions
- 5.06 Mobile broadband subscriptions
- 5.07 Mobile network coverage
- 5.08 Quality of electricity supply

3.2 Sub-Index B: T&T Policy and Enabling Conditions

Pillar 6: Prioritization of Travel & Tourism

- 6.01 Government prioritization of the T&T industry
- 6.02 T&T government expenditure
- 6.03 Effectiveness of marketing to attract tourists
- 6.04 Comprehensiveness of annual T&T data
- 6.05 Timeliness of providing monthly/quarterly T&T data
- 6.06 Country Brand Strategy rating

Pillar 7: International Openness

- 7.01 Visa requirements
- 7.02 Openness of bilateral Air Service Agreements
- 7.03 Number of regional trade agreements in force

Pillar 8: Price Competitiveness

- 8.01 Ticket taxes and airport charges
- 8.02 Hotel price index
- 8.03 Purchasing power parity
- 8.04 Fuel price levels

Pillar 9: Environmental Sustainability

- 9.01 Stringency of environmental regulations
- 9.02 Enforcement of environmental regulations
- 9.03 Sustainability of travel and tourism industry development
- 9.04 Particulate matter (2.5) concentration
- 9.05 Number of environmental treaty ratifications

- 9.06 Baseline water stress
- 9.07 Threatened species
- 9.08 Forest cover change
- 9.09 Wastewater treatment
- 9.10 Coastal shelf fishing pressure

3.3 Sub-Index C: Infrastructure

Pillar 10: Air Transport Infrastructure

- 10.01 Quality of air transport infrastructure
- 10.02 Available seat kilometres, domestic
- 10.03 Available seat kilometres, international
- 10.04 Aircraft departures
- 10.05 Airport density
- 10.06 Number of operating airlines

Pillar 11: Ground and Port Infrastructure

- 11.01 Quality of roads
- 11.02 Quality of railroad infrastructure
- 11.03 Quality of port infrastructure
- 11.04 Quality of ground transport network
- 11.05 Railroad density
- 11.06 Road density
- 11.07 Paved road density

Pillar 12: Tourist Service Infrastructure

- 12.01 Hotel rooms
- 12.02 Extension of business trips recommended
- 12.03 Presence of major car rental companies
- 12.04 ATMs accepting Visa cards*

3.4 Sub-Index D: Natural and Cultural Resources

Pillar 13: Natural Resources

- 13.01 Number of World Heritage natural sites
- 13.02 Total known species
- 13.03 Total protected areas
- 13.04 Natural tourism digital demand
- 13.05 Quality of the natural environment

Pillar 14: Cultural Resources and Business Travel

- 14.01 Number of World Heritage cultural sites
- 14.02 Number of oral and intangible cultural heritage expressions
- 14.03 Number of sports stadiums
- 14.04 Number of international association meetings
- 14.05 Cultural and entertainment tourism digital demand

4. Tourism Performance in Africa

4.1 Tourists and Tourism Products in Africa

According to Christie *et al.* (2014) tourists to Sub-Saharan Africa can be divided into four main groups according to the purpose of their visit: leisure, business, visiting friends and relatives (VFR), or others. Leisure tourists make up approximately 36 percent of the market. Business travellers constitute about 25 percent of international arrivals. Data on tourists visiting friends and relatives is not collected by all countries but is likely to make up about 20 percent of arrivals.

The “other” category includes several important niches, such as sports tourism, visits for medical treatment, and attendance at meetings or conventions.

There are three main categories of leisure tourists:

- High-end tourists who book expensive once-in-a-lifetime trips to places such as Kenya, the Seychelles, South Africa, and Tanzania
- Niche tourists who arrange overland or cross-continental trips and adventure, cultural heritage, diving, and bird-watching tours
- Lower-end charter tourists who take holidays to beaches in The Gambia, Kenya, and Senegal.

The UNWTO forecasts that 75 percent of all tourists to Africa will be intraregional African travellers by 2021. The pattern of short-haul travel in Sub-Saharan Africa is closely related to trading partners, nearest neighbours, relative incomes, and ethnic similarities.

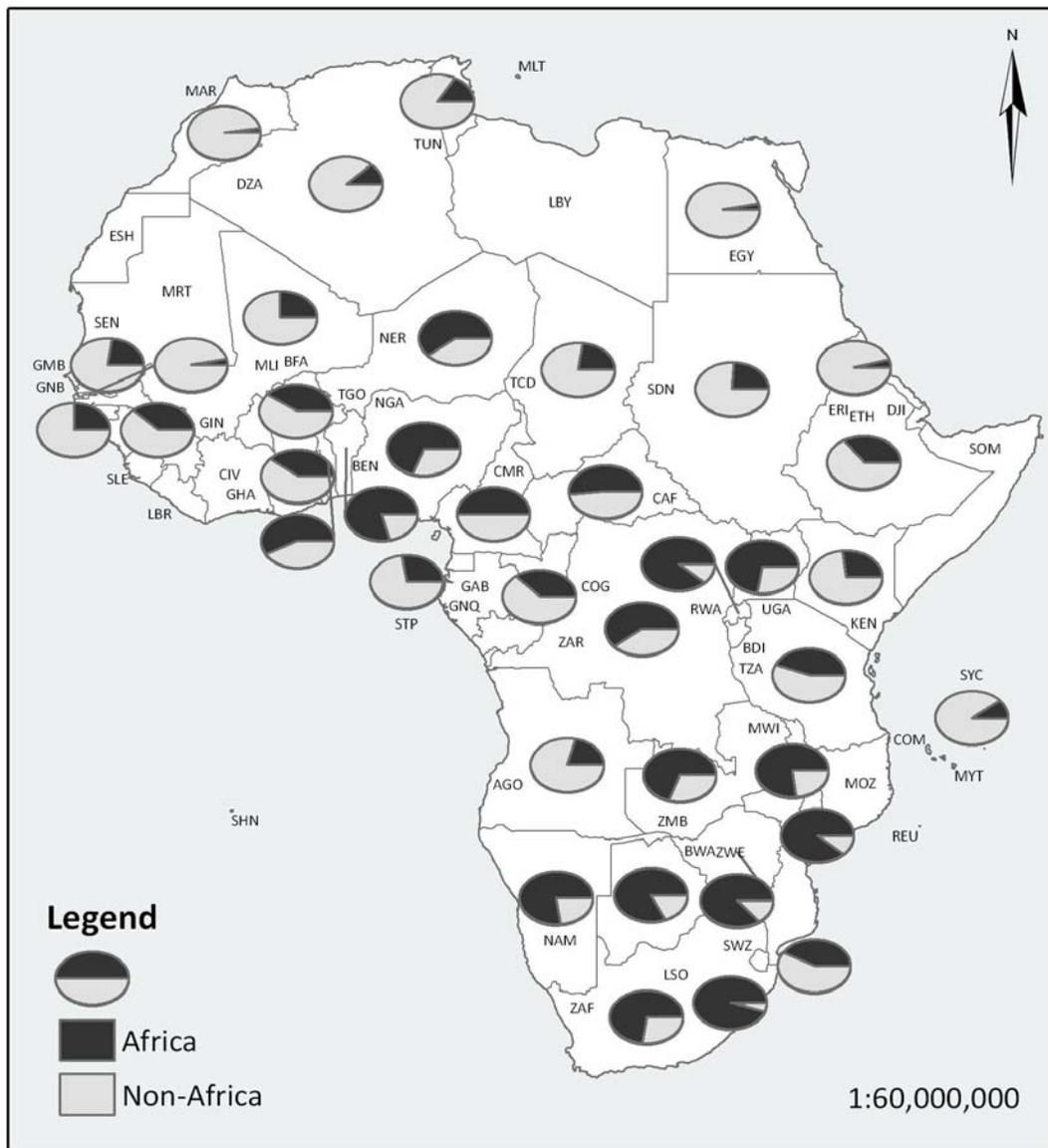


Figure 2: Percentage of tourist arrivals by continent of origin, 2005 (Fourie & Santana-Gallego, 2013)

With respect to tourism products, Africa demonstrates a growing mix that is closely matching those of mature markets like the USA and Europe.



Figure 3: Tourism Product Opportunities in Sub-Saharan Africa (Christie *et al.*, 2014)

Beach Tourism: Beaches are an important secondary product in East and West Africa but is losing appeal due to concerns about exposure to the sun.

Business Tourism: Business travel is a growth area for Sub-Saharan Africa. Unlike leisure travel, the flow of business travel depends on the dynamism of the economic activity in the destination. Business tourists, on average, tend to spend more daily than the other categories of tourists and are less seasonal than leisure tourists.

Diaspora Tourism: Predominantly composed of African American in addition to intra-Africa diaspora.

Nature and Adventure Tourism: Africa's varied terrain and remote locations make it an ideal location for many nature-based adventure sports. Dune boarding in Namibia, nature tourism in Zambia, camel expeditions in Mali, cultural heritage tours in Ethiopia, kayaking on the Zambezi River, and lemur tracking in Madagascar offer new adventure opportunities.

Cultural Heritage Tourism: Given Sub-Saharan Africa's rich traditions in music, art, and dance, cultural tourism presents a substantial opportunity for growth. Already, Ghana has marketed itself as a heritage destination by making its slave trade monuments into tourism destinations; Mali and Senegal have promoted their music festivals; Burkina Faso, through its film festival, which is attended by people from all over the world, has created a cultural product from a national passion. Tourists are particularly attracted to United Nations Educational, Scientific, and Cultural Organization (UNESCO) World Heritage sites. Developing cultural heritage opportunities in Sub-Saharan Africa will involve identifying potential sites, establishing preservation plans, and ensuring that existing sites are managed better.

Domestic Travel: Growth in gross domestic product per capita has led to the emergence of a new middle class of African consumers who have discretionary income to travel. Under the right conditions, the tourism sector can tap this wealth. Currently, domestic travel in South Africa is contributing to tourism growth; Kenya has already given priority to domestic travel, and Ghana and Zimbabwe are starting to do the same.

Intraregional Tourism: More than 10 million people are traveling across national borders every year within Sub-Saharan Africa for business meetings and conferences, medical reasons, religious journeys, shopping, sports events, and visiting friends and relatives. South Africa is the largest source of intraregional leisure travellers in Sub-Saharan Africa. Nigeria is a potential regional

tourism powerhouse, and Kenya also shows potential as a large source market for intraregional travel.

Wellness, Health, and Retirement: Opportunities for wellness, health, and retirement tourism in Sub-Saharan Africa are growing. South African hospitals are a draw for intraregional visitors, and Mauritius and the Seychelles leverage wellness opportunities in their marketing campaigns. Cabo Verde has attracted second-home buyers.

4.2 Tourism Performance

The tourism sector in the majority of African countries is not performing up to its potential. Nevertheless, 8 countries have highly successful tourism sectors and 10 others could be successful in the foreseeable future; another 15 are waiting in the wings. This suggests that opportunities exist to grow the tourism sector, especially if constraints on growth are simultaneously addressed. Because the market failures that constrain tourism also constrain other segments of the economy and because tourism has backward linkages to sectors like agriculture, construction, and light manufacturing as well as significant pro-poor benefits, such a strategy could have a truly transformative effect on the macroeconomies of African countries. To be truly transformative, the determining factor will be the scale of investment in tourism.

To understand better the highest performers in sub-Saharan Africa and why, the Tourism Team Region Financial and Private Sector Development (AFTFP) of the World Bank, developed a typology of SSA destinations, which ranked the 47 SSA countries by level of tourism development. The typology produced four distinct groups of countries in SSA. The characteristics of the four groups are:

4.2.1 Pre-emergent: These fourteen countries (see Table 2) have not yet developed their tourism sectors. The 14 SSA countries classified as having pre-emergent tourism sectors represent countries where market failure is almost complete. They have little governance or security, have shown low interest in tourism, and have poor short- to medium-term tourism growth prospects. This group also includes three countries with little or no tourism data: Equatorial Guinea, Liberia, and Somalia.

4.2.2 Potential: These fifteen countries (see Table 2) initiating tourism have shown some interest in tourism but lack adequate governance of the sector. They have some basic infrastructure for tourism but still face market failures, such as with regulation, resources, and institutions, which also affect the macro economy.

4.2.3 Emerging: These ten countries (see Table 2) are scaling-up tourism. They have solid institutions, are prioritizing tourism, and are performing reasonably well in terms of quality and competitiveness. The market failures that are evident (e.g., the high costs of access to the destination, financing, and hotel construction costs, together with continuing difficulties in land access) are mostly related to government market failures, though the small scale of tourism contributes to the high access costs.

Table 2: SSA Countries by Tourism Development Level and World Bank Income Ranking

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

4.2.4 Consolidating: These eight countries (see Table 2) are working on deepening and sustaining tourism success, have relatively mature tourism sectors, are committed to tourism, and have the highest economic and tourism performance in SSA. The management quality and capability of the private sector is reflected in the accolades that selected hotels receive.

5. Challenges and Constrain Facing Tourism in Africa

WEF (2015) takes cognizance that Africa has significant tourism potential, notably due to richness in natural resources and the potential to further develop cultural resources. However, it is still mostly in the early stages of development and strongly connected with more general and longstanding development challenges, including infrastructure as well as health and hygiene. While improvements have been achieved in these areas, especially at the local level, they remain important hurdles to attracting international tourists. Key areas of consideration for competitiveness include the following according to Christie *et al.* (2014):

- (i) Quality of tourism assets
- (ii) Standards of visitor accommodation
- (iii) Efficiency and safety of transport to, from, and within the country
- (iv) Adequacy of a variety of infrastructure components
- (v) Receptiveness of local populations to tourists
- (vi) Skills of the range of officials and employees with whom tourists interact
- (vii) Safety and security of the destinations.

Some of the constraints and challenges are highlighted below with particular reference to consult the quoted sources for details.

5.1 Administrative Barriers Hindering the Movement of People

The huge growth potential of travel and tourism is being held back by the outdated practices of visas and border controls. While in other areas great emphasis is placed on the benefits of globalization and free trade, often we forget to think of tourism as an export, and overlook restrictions on the movement of travellers. Research estimates that removing travel visas at the bilateral level would more than triple travel flows between countries. Christie *et al.* (2014) report that countries with more mature tourism sectors had removed visa requirements for their key source markets. In contrast, countries with complex visa requirements had less developed tourism sectors. Visas can be a particular constraint for small countries. If the visa is too expensive or too difficult to obtain, tour operators may opt not to include the country as part of a regional tour. When visas are expensive and passports must be sent for processing prior to travel, visitors are deterred. Independent travellers who may not have the time or access to an embassy or consulate to have their passport processed will be most adversely affected. Greater numbers of passengers can have a multiplier effect that compensates for the loss of visa revenues. Moreover, as foreigners spend across the economy, the effect is much broader than a fee that simply makes a small contribution to the overall national budget. The study indicates that operators in the United Kingdom and the United States indicate that a higher proportion of travellers to Sub-Saharan Africa use tour operators than travellers to other parts of the world because of the greater complexities of obtaining visas, booking accommodation, and making tour arrangements.

As tourism grows, planning, standards, and regulations become vital. But too much regulation and unpredictable behaviour by government can inhibit growth and ultimately make tourism less sustainable.

5.2 Lack of Security and Safety As Well As High Crime Rates

Perceptions of instability are increasingly influencing tourist flows. Despite its resilience to shocks, ultimately the travel and tourism industry's growth and survival is entirely dependent on people's ability to have a safe travel experience. Advances made in the last decade could be undone by factors including current geopolitical tensions, from the Middle East to Ukraine; the growing terrorism threat from ISIS; and the risk of pandemics, as exemplified by the Ebola outbreak. Whatever the root causes, the impact for the affected destination is the same: a

decrease in the number of tourists and amount in revenues, which may be temporary but are nonetheless significant. In high-risk times, the natural instinct of nation states is to re-evaluate their borders and immigration policies. But closing down borders is not a viable solution—it will not resolve security challenges, and will lead to further significant economic losses. To mitigate these risks, it is critical to implement technological advances and innovative processes that can increase both the efficiency and security of travel. There is a need to consider how to implement improvements in early warning systems, risk profiling and scenario planning, visa systems, data sharing and passenger profiling at airports. The key challenge is to generate the necessary levels of collaboration among international institutions, governments and the private sector. Travel advisories often make destinations unattractive to tourists.

Eighteen Sub-Saharan Africa countries are classified as “fragile states” on the fiscal 2011 rating list of the World Bank’s Country Policy and Institutional Assessment. These states are diverse and include countries that face severe development challenges, such as conflict, recovery from conflict, political instability, weak institutional capacity, and poor governance, as well as some island economies. Their common characteristics include the inability to mobilize domestic resources, dependence on external resources, poor levels of human development, low population density, weak infrastructure, concentration of exports in a few products, and high risk of conflict. Tourism development in fragile and post-conflict countries involves a unique set of challenges. When successful, as in The Gambia, tourism can be a tool for peace building, poverty alleviation, and infrastructure investment, as it improves the country’s image as an investment destination, among other benefits. News of security concerns can result in immediate cessation of tourism activities in a country. High crime rates have the same effect on visitors as internal conflict. Particularly in the early days of tourism in the Caribbean, hotels were gated and placed behind high walls, keeping tourists inside. Many luxury hotels in Sub-Saharan Africa follow the same practice. Today, however, numerous tourists visit a country to experience its culture and other attractions, such that they leave the hotel and mix with the local population.

5.3 Low Level of Tourism Skills

Sub-Saharan Africa has a large pool of young labour and more than 10 million new job seekers every year, but the average educational attainment is low and tourism employment requires mostly mid-level service sector skills. Having an educated, skilled labour force is at the core of tourism innovation and competitiveness. Service standards are a critical constraint on operations, particularly in high-cost destinations, such as Tanzania. The chief weaknesses are in business skills, understanding visitor needs and expectations, customer service, online communications, lack of foreign language skills. Low education levels, lack of prior experience, cultural differences, and poor health means that employees are less productive in many Sub-Saharan African countries. Some studies indicate that two to three foreign workers are usually employed at each full-service hotel to ensure international standards of operation; more are needed at luxury hotels (Ernst & Young, 2010).

Whereas tourism training institutes generally focus on hotel management, the current skills gap is often at the operational level. Keeping up with the level of demand for tourism education is a challenge for some African countries. Another challenge is to increase the share of local value added, with most hotel furniture imported and no trade link exists between local tourism enterprises and the local furniture industry.

5.4 Changes in Composition of Tourist Demand Will Define Business Strategies

The industry will need to deeply understand and cater their product offerings to the needs of new travellers (such as millennials and the new middle classes coming from emerging countries) and segments where demand is growing (such as senior travellers) to capitalize on shifting demographics. African destinations often lack diversified products to cater for changing trends.

5.5 Increasing Attention to Reduce Carbon Footprint

Passenger air traffic is forecast to increase by 31% by 2017, with environmental implications including a projected 20% increase in energy demand. Given targets to decrease carbon emissions, the industry is working to reduce oil dependency by improving aircraft and airport operations, aircraft design and material use and considering alternative sources of energy. The

increase in tourism may also impact local destinations through an increase in waste, water usage and the possible deterioration of cultural and world heritage sites. While global climate agreements are still a work in progress, the travel and tourism industry has taken active steps to reduce its environmental footprint and plans to continue to do so, including by implementing better measurement tools. International organizations and institutions—including ICAO, IATA, UNWTO, WTTC, ITP and the Forum—have brought leaders from the sector together to advance the dialogue on these issues and help set standards and targets for the industry.

5.6 Investments in Infrastructure Increasingly Lag Behind Industry Growth

While the tourism industry is growing strongly, infrastructure investments—airport development, road and rail, and communication technologies—are lagging behind, leading to significant bottlenecks. These will worsen if not addressed, given that cities are likely to triple in size in the next 20 years. There is a need for dialogue between the public and private sectors, including airlines and airports, to ensure an integrated infrastructure strategy and alignment on issues such as investment, regulation, sustainability, security, safety and corruption. Airports are not destinations in themselves—people do not go to airports to shop or dine, but to move quickly and seamlessly on to their destinations. They will choose alternative destinations when access is difficult.

5.7 New Technologies and Innovations are Revolutionizing the Industry

As described above, new technologies and innovations, such as GPS-enabled smartphones and growing trust in online transactions, are reshaping parts of the travel industry and requiring businesses to rethink how to deliver services. There is also a growing need for the public sector to redefine regulatory frameworks in response to the rise of the sharing economy—people are letting out their property as and when it suits them, acting as an ad hoc taxi service and even starting to crowd-source charter flights. The consumer peer-to-peer rental market is worth an estimated \$26 billion, with Airbnb alone having more than 600,000 listings across 160 countries.

5.8 Socio-Cultural Concerns Associated with Tourism in Africa

Like all industries, the tourism industry can have adverse environmental, economic and social effects and impacts. The impacts arise when tourism brings about changes in value systems and behaviour thereby threatening indigenous identity. Furthermore, changes often occur in community structure, family relationships, collective traditional life styles, ceremonies and morality. These impacts are mostly linked with the construction and management of infrastructures such as roads and airports, and of tourism facilities, including resorts, hotels, restaurants, shops, golf courses, and marinas.

Tourism has been associated with a variety of social and cultural ills, particularly prostitution. Markets for prostitution exist in all countries—demand for these services exists with or without tourism. Child prostitution and child pornography are entirely different from prostitution tourism. They are illegal activities such that those promoting and buying them can be prosecuted in the destination and their home country. Any foreigner traveling for the purpose of child prostitution or pornography is a criminal, not a tourist. The fear that foreign visitors might corrupt local cultures arose in the early days of mass tourism and package holidays. In today's globalized world, tourists are far less responsible for introducing local people to different cultures and preferences than are the Internet, movies, music, and so forth.

Crime levels are said to rise with tourism. Too often the discrepancy between the tourists' incomes and those of the local people breeds resentment toward the visitors. Again, where unemployment is high and poverty is endemic, crime is more likely to occur. One solution is to strengthen the police force in areas frequented by tourists; a related solution is to identify high-crime areas in the destination and warn tourists to stay away from them. A more effective and long-term solution is to extend the benefits of tourism to local communities living near tourist accommodation.

5.9 Wildlife Crime

The dramatic increase in poaching and illicit trade of wildlife products – often referred to as 'wildlife crime' – threatens to undermine and endanger some of the most iconic species to become

extinct within only a few decades – most prominently, elephants and rhinos, but also other big mammals such as lions and gorillas as well as smaller species. Furthermore, tourism is also threatened by the increasing loss of habitat and loss of wildlife range, human-wildlife conflicts, among other pressures. The increase in wildlife crime is as a result of widespread poverty, underfunding of wildlife conservation efforts, lack of law enforcement and political instability in the concerned countries, a rising demand for exotic animal products overseas; foremost in rapid growing economies of Asia due to increasing wealth and changes in consumer spending patterns. While in the past much of the poaching in Africa had been opportunistic, wildlife crime has become a serious criminal activity involving transnational networks of well-resourced and organized groups. Poaching and the illegal wildlife trade lead to detrimental environmental, economic and social consequences. Wildlife crime threatens the future existence of species and impacts the ecological integrity of whole ecosystems essential for the maintenance of biodiversity and ecosystem functions. Poaching deprives communities of their natural capital and cultural heritage and undermines sustainable economic development and poverty alleviation. Wildlife crime is also a security challenge that threatens national security, undermines government authority, breeds corruption and restricts the potential for sustainable investment, constraining a country's social and economic development.

5.10 Availability of Land

Ensuring that public and private land is available for tourism development is essential but often involves conflicting political, socioeconomic, technical, legal, and institutional vested interests. The existence of common land rights and “common pool resources” complicates the issue (Hardin, 1968). Serious opposition can come from local people with traditional rights to the land but no legal title. The questions of who owns land, who owns the resources on it, and how rights are transferred are central to business and tourism development. The land has to be available on a long-term basis, either through ownership or lease, and be clear of legal and other claims.

5.11 Lack of Appreciation of the Worth of Tourism

Countries scaling up their tourism industry, like Malawi and Zambia, often need to convince policy makers that tourism is of value. Despite the impressive multipliers and track record of tourism in Sub-Saharan Africa, the economic and social importance of the sector is widely underappreciated. Understanding how tourism works, what it is worth, and why it is important is crucial to achieving “destination readiness” for tourism. South Africa has poured resources into its tourism statistics unit and reaped significant results. Basic data include international and domestic arrivals and departures as well as tourist expenditures. Once the basics are in place, data are needed for subsectors of the industry: transportation (load factors and costs per passenger per kilometre, for instance), lodging (including capacity, occupancy, and room rates), small and medium enterprises, national parks (visitation and entry fees), and other areas. More market research, surveys, and systematic monitoring (including benchmark development) are needed to supply these data.

5.12 Price Competitiveness

Price competitiveness is particularly important for destinations wanting to scale up their tourism sectors. Tours to Sub-Saharan Africa cost 25–35 percent more than tours to other parts of the world and flights to Sub-Saharan Africa are almost 50 percent more expensive even where shorter distances are involved. For example, an average round-trip flight to Madagascar from New York costs \$2,975, while a flight to China from New York costs \$1,173. The reasons for the higher prices include lack of competition in the airline industry, the need for imported goods and services, and high import duties.

The cost of developing hotels and the cost of debt financing also affect tourism competitiveness in Sub-Saharan Africa. In Nigeria, the cost of developing hotels is upward of \$400,000 per room for a mid-market hotel; in Ghana the cost is \$250,000 per room. Median hotel development costs elsewhere in the world are \$200,000 per room for a full-service hotel (Ernst & Young, 2010). Higher room rates are the end result. The impression created by tourist facility operators is that the facilities are meant for foreign tourists and often by well-off people. Thus the pricing of most products is always designed to keep off local people, creating an overdependence on international tourists, often from rich countries.

5.13 Visitor Accommodation Standards

Calculations based on United Nations World Tourism Organization (UNWTO) data for 40 of the 47 countries in Sub-Saharan Africa suggest that there are about 390,000 hotel rooms in the region. Unbranded guesthouses and lodges dominate, and just 10 percent (35,200) of rooms meet international standards. South Africa has about half the region's stock of international standard accommodation. There is lack of harmonized classification, grading and rating scheme (system) for tourism and hospitality establishment and practitioners leading to the use of contradictory systems with mismatched service and product offers. Sometimes claims of eco-certified facilities are not supported by recognized best practice tourism standards with credible sustainability criteria.

5.14 Air Transport

WEF (2015) recognizes that air connectivity is essential for travellers' ease of access to and from countries, as well as movement within many countries. Measurements include the quantity of air transport, using indicators such as available seat kilometres, the number of departures, airport density, and the number of operating airlines, as well as the quality of air transport infrastructure for domestic and international flights.

Christie *et al.* (2014) report that Africa's distance from source markets creates an acute need for higher quality and more competitive air access. Air and road connections are the most commonly mentioned constraints on the growth of tourism in Sub-Saharan Africa. The high cost, irregularity, and routing of airlines around Sub-Saharan Africa reduce the competitiveness of its destinations. Despite comprising 15 percent of the world's population, the continent is served by only 4 percent of the world's scheduled air service seats. Less than 15 percent of intra-Africa seat capacity is devoted to flights between regions, and most African carriers do not fly daily due to a combination of regulations and lack of proper-size aircraft. Average one-way fares are twice as expensive in Africa as in Latin America and four times as expensive as domestic flights in the United States. Factors that contribute to the higher fares include higher airport taxes and charges, inefficiencies due to small market size, ineffective management of airlines and airports, and the power of a monopoly or duopoly to set artificially high rates. The seasonal nature of tourism in some areas further exacerbates the cost and routing issues. The route structure in Africa is focused on existing, proven traffic and does not facilitate new connectivity or stimulate Sub-Saharan African aviation. Air service, particularly in West and Central Africa, is expensive and provides infrequent and irregular schedules, often with multistop itineraries.

Charters provide some relief from the high fares on scheduled airlines and allows countries to maintain crucial business, tourism, and visiting friends and relatives (VFR) market links without the associated start-up and fixed costs of owning a national airline. Permission for charters in certain countries, however, is given only after arduous negotiation. Where an "open-skies" environment exists, such as in Kenya or Maldives, charters can be a useful solution, especially if there is high seasonality or an infrequent need for service.

Aviation has been slower to liberalize than other sectors in Sub-Saharan Africa, and further liberalization of internal, intraregional, and international flights will improve the accessibility of the region for tour operations.

Policy reforms are important to increase the number of flights and tourists, but, without efficient airports, tourism cannot even get under way. In the short term, addressing visa regimes through policy changes, enhancing cooperation between governments in specific African regions, and increasing the transfer of knowledge and best practices would strengthen the local airline industry.

5.15 Road Transport

In many destinations only seasonal access to some parts of the country is possible. Poor roads add to the cost of operating tours and increase operating costs because of vehicle and mechanical damage and pollution. Road quality and accessibility are a challenge for tour operators in The Gambia, Kenya, Senegal, and Zambia, among others. A survey conducted in 2007 in Kenya found

that traffic jams in Nairobi cost all drivers combined as much as \$746,000 a day through increased fuel consumption, mechanical damage, and pollution. Although improvements have been made, Nairobi's traffic is still congested. By contrast, Namibia and South Africa have overcome this problem through consistent investment and infrastructure development. As a result, both destinations now attract large numbers of self-drive tourists.

5.16 Taxes on Tourism Investments

Many private investors in tourism complain that the government taxes them beyond their capacity to pay. When the tourism sector appears to be profitable and yet continues to require government expenditures on infrastructure, training, and promotion, for example, governments are often tempted to look for more tax revenues from entities in the tourism sector. As an example, SMEs in Zanzibar are unable to achieve economies of scale because of high taxes and complex tax structures that favour larger hotels. Taxes and levies constitute 12.8 percent of the total value chain for meeting, incentives, conferences, and exhibitions (MICE) tourism in Nairobi, Kenya, undermining private sector reinvestment in the tourism sector.

5.17 Public Health

The public health situation in a destination is critical to a tourist's welfare. Many travellers are put off from undertaking a journey when, prior to leaving home, they must endure injections and then remember to take preventive medicine regularly during travel. Several Sub-Saharan African countries have malaria in at least some regions of the country. Other more serious diseases are prevalent or break out periodically in a few countries. High-class medical care may be available in the capital and other big cities, but not in less travelled regions. Clearly, improvements in public health are of primary value to the local population; without them, the number of foreign visitors will not expand, and visitors will be less willing to explore more remote parts of the destination.

Access to safe drinking water, functional sanitation, hygienic food and drink facilities remains a challenge for many African countries. The fact that bottling water is a flourishing industry rather than a public-wide accessible supply system is a clear indication of low investments in public utilities which should further attract tourists.

5.18 Negative Economic Impacts

Tourism can fuel higher prices for land in tourist areas. This is the equivalent of the gentrification or rebuilding of depressed urban areas in large cities throughout the world. When land is needed for economic activities that are more expensive than residential or small business can generate, land prices rise, but governments can help to mitigate these negative impacts through zoning and the construction of low-cost housing. Tourism can also lead to increased reliance by locals on imported goods and services, including food, but this can be countered by offering local cuisines to tourists, providing a more authentic experience while encouraging the continued production of local foodstuffs. Most hotels welcome a constant flow of high-quality local foodstuffs for their kitchens because they are almost always less expensive than the imported products.

If tourism growth goes unmanaged, the natural, cultural, and social assets on which tourism depends can deteriorate. Worrisome stories about the overuse of mountain slopes, coastal areas, small islands, and fragile cultural assets have been heard for years. Without question, some countries have not protected their assets as they should. With the growing realization of the fragility of these assets, the increased information about how to protect them, and the international technical and financial assistance that has followed, awareness about establishing limits on the number of visitors has helped to mitigate and stem some of the more grievous misuses of tourism assets. Bhutan controls access to the country as a whole; the Galapagos Islands limit the number of boats and occupants that can visit the site; India forbids the close proximity of vehicles to the Taj Mahal. As the discussion on economic rents in this report shows, countries have tools to acquire funds to protect and improve the assets that attract tourists. A well-balanced package of user fees and policies to protect the assets is essential for successful management of the tourism sector.

Managed sustainably, tourism is an effective development tool. When tourism's environmental, social, and economic constraints are addressed, tourism energizes economies. Costa Rica's eco-

country branding has had a positive effect on a multitude of goods and services, from the sale of coffee and furniture to manufacturing. Thailand has bounced back from military coups and a tsunami on the strength of its tourism industry. With the full knowledge that tourism is a complex sector with tentacles that reach into myriad other economic activities, all of which require careful management, countries with tourism assets should prioritize tourism as a development tool.

6. Need for African Standards on Tourism

Standards are sets of voluntary technical and quality criteria for products, services and production processes. Which help businesses work together and save money for consumers and provide practical, internationally harmonized solutions and best practice to help make set goals a reality. Furthermore, standards can be regarded as important for the proper and effective functioning of trade within a given market. Tourism standards development need to market-driven and consensus-based voluntary standards to be more effective and efficient.

6.1 Trend of Tourism Standards in Africa

Tourism in Africa can contribute effectively to economic development. Governments in Africa are showing increasing interest in tourism as a source of growth and diversification. The tourism industry throughout Africa often operates below international competitive standards, but several products already meet international standards of excellence. In most cases in Africa tourism standards have been proposed by career standardisation officers and have neither been market-driven nor consensus-based which is important in standards development. This should be enhanced to boost economic, environmental, and cultural sustainability, poverty alleviation and social inclusion.

6.2 Need for Harmonization

As tourism is service oriented, development of standards for tourism with broaden the dimension for the service sector as a whole as standards improve the economic, social and environmental management thus ensuring sustainable development. The need for harmonisation is directed towards:

- Support the integration of sustainability in tourism development policies
- Support to governments and other institutional stakeholders in the local regional and international level
- Promote sustainable production patterns in the tourism value chain
- Cooperation with the tourism industry (Hotels, tour operators, transportation industry, etc.)
- Encourage demand for "sustainable tourism services"
- Consumer based activities on sustainable tourism

7 Scope of Tourism Standards

7.1 Principles and Objectives of Standards Harmonization

The standardization of African Standards for tourism shall be based on the sustainability principles and criteria with the following broad objectives:

7.1.1 Institutional Framework

- (a) Policy guidelines for destination governance
- (b) Guest governance framework
- (c) Tourist safety framework
- (d) Policy guidelines for various forms of tourism
- (e) Capacity development in tourism

7.1.2 Economic Guidelines

- (a) Assess economic impacts before developing tourism.
- (b) Maximise local economic benefits by increasing linkages and reducing leakages.
- (c) Ensure communities are involved in and benefit from tourism.
- (d) Assist with local marketing and product development.
- (e) Promote equitable business and pay fair prices.

7.1.3 Social Guidelines

- (a) Involve local communities in planning and decision making.
- (b) Assess social impacts of tourism activities.
- (c) Respect social and cultural diversity.
- (d) Be sensitive to the host culture.

7.1.4 Environmental Guidelines

- (a) Reduce environmental impacts when developing tourism.
- (b) Use natural resources sustainably.
- (c) Conservation and protection of biodiversity.

7.2 Scope of Standards Harmonization

Standardization of the terminology and specifications of the services offered by tourism service providers, including related activities, touristic destinations and the requirements of facilities and equipment used by them, to provide tourism users, providers and consumers with criteria for making informed decisions on service aspects such as:

- (1) Tourism and related services — Tourism accommodation facilities and related establishments terminology
- (2) Tourist and hospitality facilities and destinations — Classification and rating principles and criteria
- (3) Tourism and related services — Criteria for grading restaurants and other places for entertainment places (Formal and Informal catering and drinking establishments)
- (4) Tourism and related services — Taxi Transport Services
- (5) Meetings, incentives, conferences, and exhibitions (MICE) tourism — Sustainable Event Management
- (6) Tourism and related services — Sustainable resource management (water, energy,)
- (7) Health tourism services
- (8) Sustainable cultural tourism
- (9) Tourist information and reception services at tourist information offices
- (10) Sports tourism — Tourism related sports
- (11) Sustainable tourism in fragile ecosystems — Islands, marinas, coastal areas and protected areas
- (12) Volcano and geothermal tourism - Sustainable geo-resources for leisure and recreation
- (13) Travel agency and tour operations related services
- (14) Tourism Service providers and personnel - Tour guiding services
- (15) Tourism Training and Education

- (16) Tourism and related services – fire safety in tourism related establishments
- (17) Recreational diving services
- (18) Beaches and beach operations
- (19) Destination governance and management guidelines
- (20) Natural protected areas and sustainable management of biodiversity
- (21) Adventure tourism
- (22) Safety and Security Management in Amusement and Recreational establishment/facilities
- (23) Ecotourism
- (24) Pro-poor tourism
- (25) Sustainable rural tourism (including agri-tourism)
- (26) Urban tourism
- (27) Conference centres
- (28) Industrial tourism
- (29) Management of safety and security in the tourism industry
- (30) Sustainable tourism in Africa — Ecolabelling criteria
- (31) Management of safety and security in the tourism industry
- (32) Tourist behavior – code of conduct
- (33) Sustainable Tourism marketing – criteria for marketing, brand visibility and destination recognition
- (34) Guidelines for sustainable Community based tourism
- (35) Sustainable Guidelines for cultural industries – cultural goods/products and handicrafts, film, music, art and dance
- (36) Certification schemes and systems:

8. Liaison Possibility

The Réseau Normalisation et Francophonie (RNF), a network of French-speaking standardization bodies established in 2007 is currently harmonizing sustainable tourism standards. The RNF covers 27 countries in 3 continents and almost 80 members in French-speaking Africa. Through the cooperation MOU signed between ARSO and RNF, there is a possibility of ARSO liaising with RNF in harmonizing the following sustainability standards in tourism which are of identical interest with ARSO:

- (1) Sustainable tourism in Africa — General principles to reinforce the sustainable tourism in Africa
- (2) Sustainable tourism in Africa — Orientations and good practices for the public authorities

- (3) Sustainable tourism in Africa — Good practices to be respected by the professional tourism operators
- (4) Sustainable tourism in Africa — Good practices of behaviour of a responsible tourist
- (5) Sustainable tourism in Africa — Capacity Building for Public and Private Stakeholders



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