

Tourism 2020 Vision

# Volume 1

# Africa

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# Introduction

The *Tourism 2020 Vision* programme of research and forecasting represents a continuation of WTO's work in the area of tourism forecasts initiated in 1990 with the general objective:

- to identify the key trends in tourism supply and demand world-wide, by region; and
- to determine their impact on the various sectors of the tourism trade; together with
- the implications for policy making and relevant strategies.

The first two phases produced a series of forecasting reports for the six WTO regions and a global volume (*Global Tourism Forecasts to the Year 2000 and Beyond*). These studies constituted part of the WTO's commitment to assist Members in developing the sophisticated tourism forecasting capabilities which are essential to support Governments and National Tourism Administrations (NTAs) role in tourism marketing and promotion, development planning and provision of infrastructure and services. WTO has continued its assistance in this area through inter alia a series of technical seminars and its regular *Tourism Market Trends* publications.

The response from Members to the first series of forecasting reports was strongly positive with a request for more detailed information such as: region-region (even country-country) flows, profiles of major outbound travel markets (both established tourism sources, and emergent origins), assessment of prospects for groupings of countries smaller than, or which constitute 'natural' groupings not in line with, the six WTO regions. Concise 'fact files' of a number of market segments (such as those that are already substantive, and those which have rapid-growth prospects) should also be included.

Phase 3 - *Tourism 2020 Vision* - was designed to take account of these expressed needs. An extensive programme of research and analysis was undertaken over a two-year period. The research included a new survey of NTA members of WTO with responses received from 85 countries. A follow-up response was also sought from 15 Asian countries in January and September 1998 as a consequence of the financial problems in the region. A survey was also carried out among 50 tourism 'visionaries' (i.e. tourism and travel companies, and their suppliers, researchers/writers/ publishers/academics specialising in tourism, economic and political specialists).

The results of the Phase 3 programme of work are presented in the following series of reports:

## 1 Executive Summary

A document entitled 'Executive Summary' was distributed at the General Assembly in Istanbul in October 1997 which contained: global tourism prospects and determinants; regional forecasts; the results of the NTA survey; and the 'Megatrends' which will need to be exploited (or taken into account) for success in the period to 2020. An updated version of the Executive Summary, distributed at the Ministerial Conference on Oceans and New Tourism Destinations in Lisbon in June 1998, was expanded to include key developmental and marketing factors; while a second revision was published in December 1999 taking the September 1998 Asian NTA survey results into account.

## 2 Global and Regional Forecasts

The detailed report on which the Executive Summary and its subsequent revisions are based.

## 3 Market Segments

This report contains a series of 'fact files' containing analysis of major and rapidly growing market segments/niches, presenting information on a comparable, action-oriented format for each subject segment on:

- Working definitions;
- Estimates of magnitude;
- Characteristics of demand and supply;
- Growth prospects; and
- Promotional guidelines for NTAs.

## 4 Six Regional Volumes

Examination of changes, performance and trends in the first half of the 1990s will preface detailed forecasts for each region, and special groupings of countries within these regions. Inbound and outbound tourism forecasts are presented, as well as principal origin-destination forecasts on a subregional and (in selected major cases) a country-country basis.

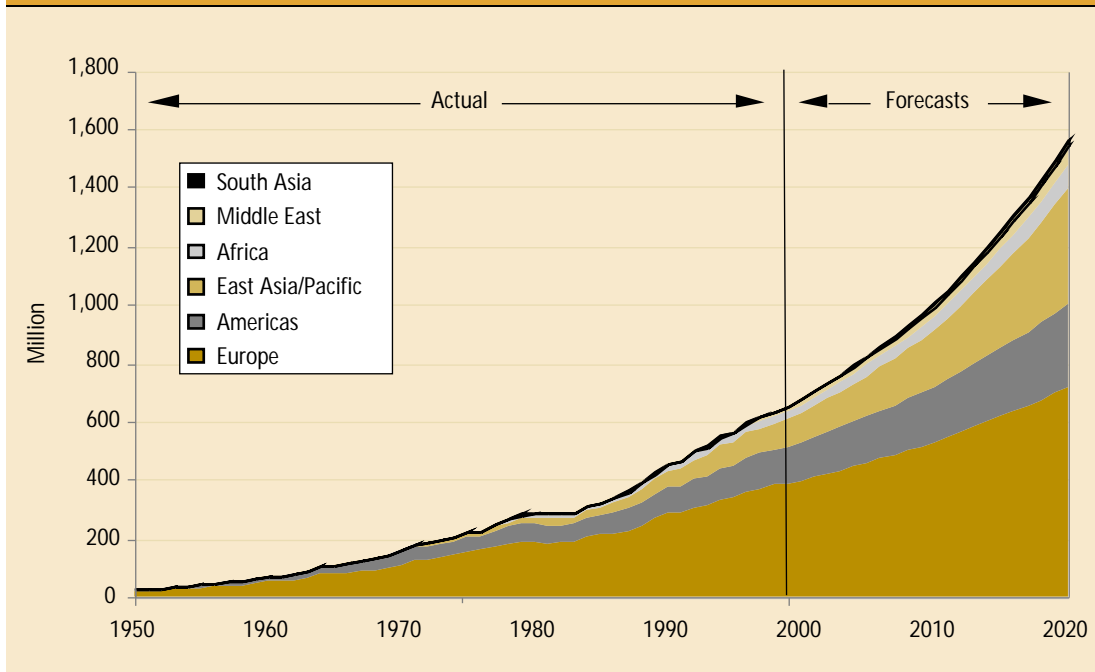
The present report constitutes *Tourism 2020 Vision: Volume 1 Africa*. It is structured in three parts (the first examining the development of tourism in Africa in the first half of the 1990s, the second dealing with the determinants governing the forecasts for the period to 2020, and the third presenting the forecasts themselves broken down by subregion).

There is also a summary of the main findings and conclusions, and this introduction. In addition, there are two appendices containing administrative, reference and technical information.

# Executive Summary

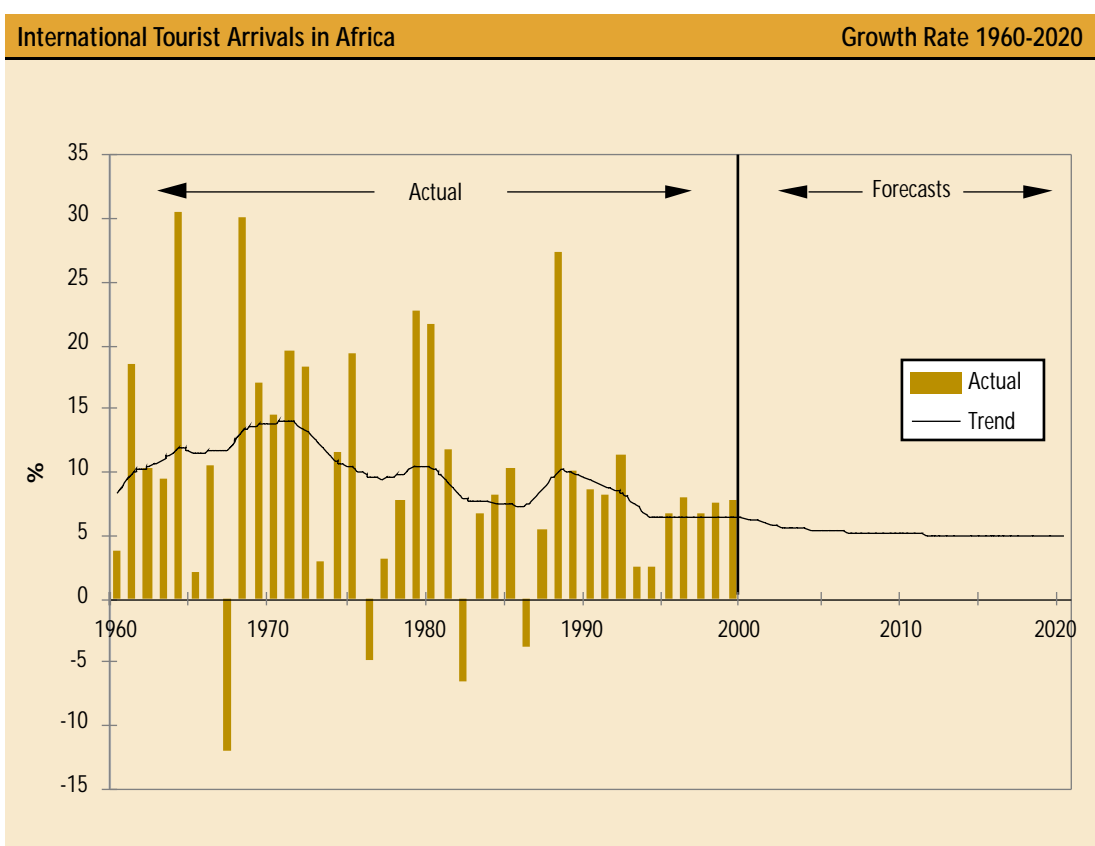
- Africa has consistently outperformed the world as a whole in terms of growth rate in international tourist arrivals, increasing its share from 1.5 per cent in 1970 to 3.9 per cent in 1998. Total arrivals in Africa reached 24.9 million in 1998, more than three times the level of 1980.
- A series of National Tourism Administration (NTA) surveys undertaken by WTO over the last two years shows that NTAs are intensifying their promotional activity and developing more aggressive strategies. In terms of geographic markets, three quarters of African NTAs are concentrating on key European, North American and intraregional markets. There is a change of focus away from coastal and safari tourism (though this is still the mainstay of tourism in many African countries) towards special interest (cultural, ecotourism) and adventure-based holidays. There is a significant growth in joint venture promotion with the local and overseas tourism private sector. Joint regional marketing is also on the rise. A number of countries are making use of the Internet, but progress in the use of electronic marketing technology is patchy.

International Tourist Arrivals, 1950-2020



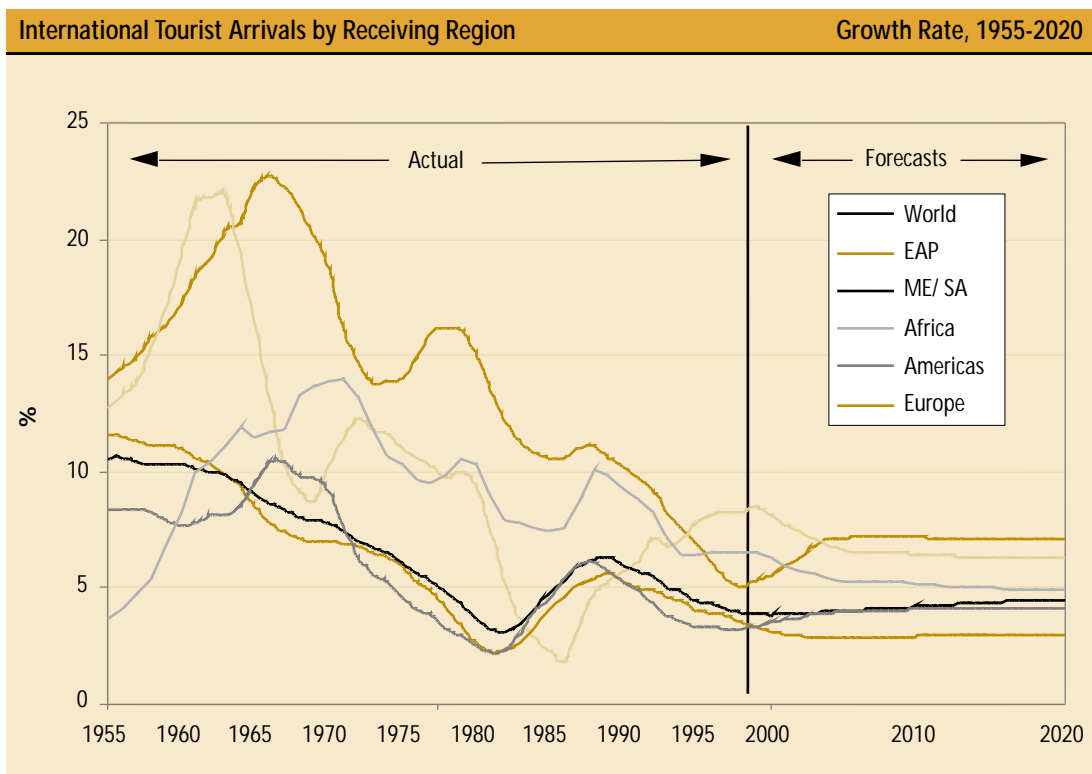
- Given widely prevailing perceptions overseas that Africa poses personal security risks for tourists, countries are concentrating on measures to reduce such problems allied to image correction marketing. Activities include: domestic education and awareness programmes on the value of tourism (e.g. South Africa) and on the dangers of infectious diseases such as AIDS, the introduction of special security measures (e.g. Kenya's tourist police force) and a regional branding strategic approach (e.g. the Regional Tourism Organisation of Southern Africa - RETOSA).

- All African countries have extensive, dynamic tourism product development programmes in place, seeing tourism as a key component of their economic development policies in coming decades. Boosted by the re-emergence of South Africa as a strong tourism destination (and generating market for intraregional tourism), the countries of the continent see their opportunity to break through the credibility barrier and are pursuing structured and integrated long term strategies (with many countries having recently completed long term plans e.g. Benin, Central African Republic, Côte d'Ivoire, Djibouti, Eritrea, Ghana, Guinea, Namibia, South Africa and Uganda).



- The *Tourism 2020 Vision* forecasts show that international tourist arrivals are expected to reach over 1.56 billion by the year 2020. This demonstrates an annual growth rate of 4.1 per cent over the period 1995-2020. Long-haul travel worldwide will grow faster than intraregional travel. In 1995, long-haul travel accounted for 18 per cent of all international trips; by 2020 this is expected to increase to 24 per cent.
- Forecasts for international tourist arrivals to Africa show that there will be 77.3 million in 2020. This represents an annual growth rate of 5.5 per cent over the period 1995-2020, which is above the global growth rate of 4.1 per cent. Consequently, the overall share of arrivals to Africa is expected to increase over the forecast period to 5 per cent in 2020. Long-haul travel to Africa will grow at a slower rate than intraregional travel, with the result that by 2020 there will be almost twice as many intraregional arrivals recorded than from long-haul source markets.

- The *Tourism 2020 Vision* study forecasts that there will be over 62 million outbound tourist arrivals generated by African residents in the year 2020. This represents an annual growth rate over the period 1995-2020 of 6.2 per cent, two percentage points above the global average of 4.1 per cent. This represents an increase in share of global tourism generated from 2.5 per cent in 1995 to 4.0 per cent by 2020. Though constituting a minor share of Africa's total travel in 2020 (one third), growth in demand for interregional destinations will be less than one percentage points below that for intraregional tourism between 1995 and 2020.
- By 2020, 346 million tourists will visit Mediterranean destinations, representing about 22 per cent of all arrivals worldwide. Despite an average annual growth of just 3 per cent, maintaining the Mediterranean as the world's largest tourist receiving region, the region's share of global tourism is expected to decrease over the period 1995-2020.



- The 22 countries of the Indian Ocean Region are forecast to receive 179 million international tourist arrivals in the year 2020, thus recording an annual growth rate of 6.3 per cent over the period 1995-2020. Consequently, the Indian Ocean region is gaining market share of worldwide tourist arrivals, and by 2020 one-in-every-nine (or around 11 per cent) of tourist arrivals will be to an Indian Ocean country.
- The individual inbound country forecasts for the main tourist destinations within Africa show that South Africa will increase its dominance as the continent's principal destination accounting for almost 40 per cent of all international tourist arrivals in 2020, i.e. over 30 million. The two North African countries of Tunisia and Morocco will be the next most important, each accounting for close to 9 million arrivals by 2020.

- South Africa is also set to increase its position as the major tourist generating country in Africa, with nearly 12 million arrivals worldwide in 2020.

