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## Enhancing Hospitality and Tourism Industry Competitiveness in Sub-Saharan Africa

### Emerging Trends, Challenges and Strategies

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#### Introduction

Tourism involves unique and fulfilling experiences, and there has been a shift in the types of demand from the traditional relaxation tourism experiences towards more niche, special interest and customized experiences. Tourists have an increasing desire for adventure, to interact with locals and to understand more about the lived experiences of others. The modern tourist is also interested in sustainable and authentic experiences, which are as close to nature as possible. Africa can offer tourists all of the above, and the continent can actualize its tourism potential and position itself to meet the new forms of tourist demand.

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The “Africa Rising” narrative of the late 2000s (*The Economist*, 2011) has resulted in a deeper interrogation of what type of growth Africa needs and how this growth will occur, together with the industries that will contribute to the growth of the African economy. Coupled with this, is the realization that development in terms of GDP growth alone will not result in sustainable and equitable development but will rather create and propagate inequality as evidenced in other rapidly developing economies such as China and India (*The Economist*, 2011). In addition, there is the question of what Africa can contribute to the world economy, what makes Africa different and how this difference can be translated into sustainable development on the continent. The United Nations designated 2017 as the international year of sustainable tourism for development, a timely recognition of the importance of tourism and how the industry can contribute to economic and social value for developing economies.

Tourism has been purported to be a vehicle for economic growth and social integration (Heath, 2002; Muangasame & Khunon, 2013). Despite the economic downturn in some economies and geopolitical conflicts in some regions, the global travel and tourism industry is the world’s largest employer and one of the fastest growing industries in the world (Cucculelli & Goffi, 2016; World Economic Forum, 2017). The industry contributed 10.2 per cent to global GDP in 2016, which is higher than the growth in the other industries: financial sector, manufacturing, and retail and transport sectors (World Economic Forum, 2017). This is an indicator that the major GDP growth contribution has shifted from goods and products toward the service industry, with the tourism industry comprising a significant portion of this (Ministry of Tourism: Republic of South Africa, 2016).

In Africa, the tourism industry contributed 3.1 per cent of GDP in 2016 and is forecast to rise by 4.5 per cent per annum to 2027 (World Economic Forum, 2017). The industry supported 8.35 million jobs, 2.6 per cent of total employment in 2016 and more people are set to join the industry as it grows and comes to be seen in a more appealing light on the continent (World Economic Forum, 2017).

Tourism provides a means for nations to diversify their economies, and increase their revenue (World Economic Forum, 2015). It enhances development by contributing to economic growth employment, female

empowerment and cultural and heritage preservation, as well as creating an appreciation of cultures. The industry is resilient, adaptable and dynamic, which means it can be tailored to suit the needs of tourists, and therefore requires a deep and concerted effort to understand in detail how the industry works. This is because tourism is a multifaceted sector with its political, economic, social and environmental aspects typified by diversity and the number of organizations within the tourism industry (Elliot, 1987).

The potential for tourism in Africa, with its 54 diverse countries and a broad range of tourist attractions from cultural and historical sites, beaches, hills, wildlife and flora, amongst others, is immense. According to the World Travel & Tourism Council (WTTC), Angola, Uganda and Mozambique are forecast to be among the 10 fastest growing destinations for leisure travel between 2016 and 2026. As such, looking at tourism as an industry for sustainable development may be an important “silver bullet” the African continent has underappreciated.

International tourism has grown and will continue to grow, particularly with travellers looking for new destinations to travel to, where their money can travel; this positions the continent to attract domestic, regional and international tourism demand. It presents the rationale for a focus on Africa and the tourism opportunities that can be realized on the continent. Conversely, Africa is a heterogeneous continent. While the continent as a whole has not realized its tourism potential, some countries, like South Africa, Gambia, Tanzania, Cape Verde and Kenya, have to a large extent understood and appreciated the contributions of tourism to their development trajectory. Other countries, such as Uganda, are embracing tourism as a potential income earner, while many African countries lag in their appreciation and realization of tourism’s potential to contribute to their economic and social growth.

The potential and contributions of the tourism industry presented, the growth of the industry in Africa needs to be effectively managed to ensure that the continent can harness the potential from the industry. Indices, such as competitiveness, provide a useful matrix by which to understand the factors that influence the attractiveness of destinations.

This chapter explores the meaning of tourism competitiveness as a measurement tool with which to analyse the performance of the tourism

industry in sub-Saharan Africa (in this chapter, references to the continent refer to sub-Saharan Africa). We provide a summary of the challenges to the tourism industry and proffer some solutions that can enhance the tourism competitiveness on the continent.

## Tourism Competitiveness

Competitiveness, a concept adapted from economic theory, refers how an organization can be better compared to another (Porter, 1990). Porter's (1990) definition is useful to examine and analysis current levels of competitiveness. However, a more comprehensive definition of competitiveness is required to understand how competitiveness may be understood within the tourism industry, comprising several interconnected parts, to include attractions, transportation, services, marketing and promotion (Gunn & Var, 2002); which contributes to the complexity inherent in the tourism industry, being connected to and comprising of, several other sub-sectors: destinations, transportation, leisure activities, and hospitality (Hassan, 2000).

In this regard, competitiveness as it relates to tourism, can mean the relative attractiveness of a destination in terms of its economic and qualitative factors, including tourist products, when compared to other destinations. Destination attractiveness includes considerations for price, value and experiences. Competitiveness can be viewed from the demand-side, for tourists, and also the supply-side, to include productivity levels, price and costs of capital and labour (Perles Ribes, Rodríguez, & Jiménez, 2011). The demand and supply-side aspects of tourism are dyadic in nature seeing as investors are more likely to invest in destinations perceived to have good tourism products, and investing in a tourist destination improves its appeal to tourists.

Introducing sustainability into the equation, Hassan (2000, p. 240) posits that competitiveness is a "destination's ability to create and integrate value-added products that sustain its resources while maintaining market position." As such, competitiveness requires the destination to satisfy and exceed expectations of customers and other stakeholders, while in the same vein ensuring that future opportunities are harnessed and threats

are mitigated within the destination (Mostafa, Sadegh, & Zainab, 2010), to ensure it continues to remain competitive. Tourism competitiveness is, therefore, an important concept to understand the economic and social value that a destination can contribute to the country (Ritchie & Crouch, 2000).

Traditionally, the competitiveness literature focuses at the level of the firm, to understand competitiveness between firms, in the same industry. Tourism competitiveness, on the other hand, is an industry-level analysis of competitiveness between nations. This means that within a country, the focus needs to be on understanding what works best for the destinations in the country. Consequently, competitiveness requires a destination-level analysis that feeds into the country-level analysis. Global indexes attempt to provide this information, looking at the country-level analysis to assess competitiveness.

Indexes are prepared from data that provide empirical evidence that can aid timely policy and investment decisions (World Economic Forum, 2017). They provide a way to understand what is happening in a destination, and a basis for comparing the performance of various destinations. The concept of tourism competitiveness has been largely successful because indexes are based on an aggregate of several factors rather than a single determinant. The indexes also allow for comparisons to be made within and between countries, for benchmarking, prioritization and making investment decisions for academic, public and private sector users. Various indexes have been developed that attempt to appraise the competitiveness of destinations into a number, ranked on a scale using various methodologies (Pulido & Sanchez-Rivero, 2009).

The Travel and Tourism Competitiveness Index (TTCI), developed by the World Economic Forum (WEF), is one of the most recognized and reputable for academic and practitioner audiences, given that it covers several components of tourism competitiveness. The report incorporates complementary information about key economic indicators from the World Bank, and country indicators from the World Travel and Tourism Council.

The TTCI provides a useful set of indicators that can be used to analyse the strengths and weaknesses of destinations, and understand their comparative performance and ranking. It is based on an extensive

framework that examines and analyses the components of a destination's competitiveness. It is a useful tool to understand what is needed to enhance the tourism competitiveness of destinations in Africa (World Economic Forum, 2015). Published biannually, it measures the performance of a given country in each of its specific sub-index and provides them with scores from 1 to 6, with 1 being the lowest and 6 being the highest.

This requires the ability to see things holistically at the country level of focus, and then the destination level (for countries with more than one tourist destination) of focus and specifically, being able to drill down into the state of the components of the tourism system, and how they can be made more attractive.

Indexes can be used as a measurement tool with which to compare the drivers of competitiveness and evaluate performance to determine the areas for government intervention. Nevertheless, appraising competitiveness, and the use of indexes are not without criticism. Competitiveness is a relative value and not an absolute value seeing as it is gathered in relation to other destinations (Cucculelli & Goffi, 2016). We have used the TTCI as the basis for our analysis in this chapter as it is the most respected tourism competitiveness measurement tool.

The appendix details the categories that comprise the sub-indexes and pillars of the TTCI.

## **Tourism Competitiveness in Sub-Saharan Africa**

The first edition of the Travel and Tourism Competitiveness Report was published in 2007 by the World Economic Forum. The Report comes out every two years and it is prepared using economic indicators obtained from the World Bank and the World Travel and Tourism Council (WTTC). The number of countries covered by the report has risen, from 124 in 2007 to 141 economies in 2015, although the number of countries decreased to 136 in 2017, when the latest report was published, due to the non-availability of data from some countries.

The tourism and competitiveness report of 2017 highlighted that the tourism industry in Africa has significant potential, with some improvement in the continent's 2015 performance (World Economic Forum, 2017). The continent has a richness in cultural and natural resources, which can be further developed to appeal to tourists. However, Africa has longstanding development challenges such as infrastructure and health and hygiene that continue to limit growth in the tourism industry as well as other industries too.

In this section, we provide an overview of the current state of tourism competitiveness in sub-Saharan Africa highlighting the TTCI results of eight countries selected from East, West, Central and South Africa, to give a sense of the nature of the tourism industry in Africa. Burundi, Cameroon, The Gambia, Kenya, Nigeria, South Africa, Uganda and Zimbabwe were selected to present a representative sample of the sub-regions in sub-Saharan Africa. Although these countries are at various points in their tourism development trajectories, they provide a useful sample and means by which to understand the state of travel and tourism in sub-Saharan Africa, and the opportunities for enhancing competitiveness. North Africa is not represented in this analysis as it has been grouped together with the Middle East in the TTCI. As such, references to Africa and the continent refer to sub-Saharan Africa.

From the 2017 TTCI, sub-Saharan Africa lags other continents in the world. No sub-Saharan African country is ranked within the top 50 destinations in the world. The region just slightly gets past the 3-score mark (on a scale of 7), representing a 0.5 per cent improvement from 2015. This pales in comparison to top performers like Europe, Eurasia and Asia-Pacific with scores over 4; evidence that Africa has some way to go (World Economic Forum, 2017).

Table 6.1 below shows the rankings of the eight countries together with the scores for the respective TTCI pillars, in brackets.

Below, we present an overview of the performance of the countries in the TTCI and their demographics (obtained from CIA Factbook and TTCI report 2017) to show how they rank on their bid to be more competitive.

Table 6.1 Ranking and scores—2017 TTCI report

| Pillars 2017                           | Burundi   | Cameroon  | The Gambia | Kenya     | Nigeria   | South Africa | Uganda    | Zimbabwe  |
|--|-----------|-----------|------------|-----------|-----------|--------------|-----------|-----------|
| Business environment                   | 122 (3.9) | 117 (4.0) | 90 (4.2)   | 70 (4.4)  | 84 (4.3)  | 21 (5.3)     | 87 (4.3)  | 134 (3.0) |
| Safety and security                    | 111 (4.2) | 110 (4.3) | 52 (5.6)   | 129 (3.4) | 132 (3.1) | 120 (3.9)    | 104 (4.6) | 60 (5.5)  |
| Health and hygiene                     | 111 (3.8) | 121 (3.1) | 116 (3.6)  | 120 (3.2) | 132 (2.7) | 113 (3.8)    | 130 (2.8) | 128 (2.9) |
| Human resources and labor market       | 119 (3.9) | 88 (4.4)  | 114 (4.0)  | 76 (4.5)  | 126 (3.6) | 63 (4.6)     | 115 (4.0) | 127 (3.6) |
| ICT readiness                          | 136 (1.6) | 122 (2.7) | 110 (3.3)  | 106 (3.4) | 114 (3.2) | 68 (4.4)     | 119 (2.8) | 117 (2.9) |
| Prioritization of travel & tourism     | 134 (2.5) | 132 (2.8) | 46 (4.8)   | 21 (5.3)  | 126 (3.2) | 59 (4.7)     | 99 (4.1)  | 105 (3.9) |
| International openness                 | 128 (1.8) | 127 (1.8) | 120 (2.1)  | 70 (3.0)  | 124 (1.9) | 110 (2.4)    | 69 (3.0)  | 82 (2.9)  |
| Price competitiveness                  | 95 (4.7)  | 58 (5.0)  | 36 (5.3)   | 74 (4.8)  | 68 (4.9)  | 43 (5.2)     | 60 (5.0)  | 53 (5.1)  |
| Environmental sustainability           | 74 (4.1)  | 70 (4.1)  | 83 (4.0)   | 26 (4.7)  | 96 (3.9)  | 117 (3.6)    | 46 (4.3)  | 68 (4.1)  |
| Air transport infrastructure           | 130 (1.6) | 127 (1.6) | 119 (1.8)  | 72 (2.5)  | 108 (2.0) | 46 (3.4)     | 121 (1.8) | 116 (1.9) |
| Ground and port infrastructure         | 115 (2.3) | 120 (2.2) | 84 (3.0)   | 70 (3.1)  | 126 (2.1) | 59 (3.4)     | 117 (2.3) | 110 (2.4) |
| Tourist service infrastructure         | 136 (1.8) | 119 (2.4) | 107 (2.8)  | 95 (3.2)  | 108 (2.7) | 108 (4.4)    | 100 (3.0) | 106 (2.8) |
| Natural resources                      | 129 (2.0) | 80 (3.3)  | 111 (2.3)  | 15 (4.7)  | 105 (2.4) | 23 (4.4)     | 44 (3.7)  | 48 (3.6)  |
| Cultural resources and business travel | 130 (1.1) | 114 (1.3) | 128 (1.2)  | 77 (1.6)  | 61 (1.9)  | 19 (3.4)     | 79 (1.6)  | 93 (1.5)  |

Source: WEF: Travel &amp; Tourism Competitiveness Report 2017



## Burundi

Burundi is ranked 134th out of the 136 countries in the 2017 report, moving one place higher from 135 in 2015. This is a gradual but continual progress that started in 2013, when it was ranked 138th. Burundi is ranked strongly for its environmental sustainability and price competitiveness, ranking within the top 100 in the two pillars. However, travel and tourism does not appear to be important to the government as the country is ranked poorly (134th) for its prioritization of the tourism industry. Highlighted challenges include the lack of infrastructure, ICT readiness, human resources and business environment (Table 6.2).

## Cameroon

Cameroon is the 126th country in the ranking, dropping from 122nd in 2015 and 121st in 2013. However, the country performs strongly for its natural resources and price competitiveness and environmental sustainability. Key areas for intervention are infrastructure, safety and security, human resources, health and hygiene, ICT readiness, international openness and the prioritization of travel and tourism in the national agenda (Table 6.3).

**Table 6.2** Relevant tourism indices—Burundi

|   |   |
|---|---|
| Burundi                                 |   |
| Population                              | 11,099,298  |
| GDP per capita                          | \$800 (2016 est.)   |
| Resources                               | Agriculture accounts for over 40% of GDP and employs more than 90% of the population. Burundi's primary exports are coffee and tea. |
| Revenue                                 | \$525.1 million (2016 est.)   |
| Expenditure                             | \$656.9 million (2016 est.)   |
| International tourist arrivals          | 131,000   |
| International tourism receipts          | \$2.2 million   |
| T&T industry employment<br>(% of total) | 37,829 jobs (1.9%)  |
| T&T industry GDP (% of total)           | \$68.9 million (2.3%)   |
| TCCI ranking                            | 134/136 (2017), 135/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

## The Gambia

The Gambia attains 112th position overall, dropping 3 places from 109 in 2015 and 20 places from 92nd in the 2013 ranking. The country finishes in the top 50 in prioritization of travel and tourism (46th) and price competitiveness (36th). The country also scores 5.2 to finish 52nd in safety and security, doing better than many of its regional counterparts. However poor performances in infrastructure, natural resources and cultural resources continue to hold back the country (Table 6.4).

**Table 6.3** Relevant tourism indices—Cameroon

|                                      |   |
|--------------------------------------|---|
| Cameroon                             |   |
| Population                           | 24,360,803  |
| GDP per capita                       | \$3300 (2016 est.)  |
| Resources                            | Modest oil resources and favorable agricultural conditions. |
| Revenue                              | \$4.765 billion (2016 est.)                                 |
| Expenditure                          | \$6.497 billion (2016 est.)                                 |
| International tourist arrivals       | 812,000   |
| International tourism receipts       | US \$450.0 million  |
| T&T industry employment (% of total) | 141,724 jobs (2.7%)   |
| T&T industry GDP (% of total)        | \$899.1 million (3.1%)                                      |
| TCCI ranking                         | 126/136 (2017), 122/141 (2015)                              |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

**Table 6.4** Relevant tourism indices—The Gambia

|                                      |  |
|--------------------------------------|--|
| The Gambia                           |  |
| Population                           | 2,009,648                                  |
| GDP per capita                       | \$1700 (2016 est.)                         |
| Resources                            | Agriculture provides for one-fifth of GDP. |
| Revenue                              | \$231.5 million (2016 est.)                |
| Expenditure                          | \$323.6 million (2016 est.)                |
| International tourist arrivals       | 135,000                                    |
| International tourism receipts       | \$120.0 million                            |
| T&T industry employment (% of total) | 49,063 jobs (6.9%)                         |
| T&T industry GDP (% of total)        | \$69.2 million (8.4%)                      |
| TCCI ranking                         | 112/136 (2017), 109/141 (2015)             |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

## Kenya

Kenya ranks 80th in 2017, dropping 2 places from 78th in 2015. This is in contrast to 2 years ago when the country moved up 18 places from 96 in the 2013 ranking. Natural Resources (15th) are the country's strength. The wildlife and UNESCO heritage sites that dominate the Kenyan landscape continue to attract visitors. The importance attached to travel and tourism is also evident in its 21st place ranking for its prioritization of the sector. However, fundamental regional issues of safety and security (129th), and health and hygiene (120th) are clear obstacles. Efforts are also still required to develop the country's ICT readiness (106th) (Table 6.5).

## Nigeria

Nigeria is ranked 126th overall in 2017, moving up 5 places from 131st in 2015 and one position higher than its 127th ranking in 2013. At a time when the country is experiencing an unprecedented economic

**Table 6.5** Relevant tourism indices—Kenya

|   |   |
|---|---|
| Kenya                                   |   |
| Population                              | 46,790,758  |
| GDP per capita                          | \$3400 (2016 est.)  |
| Resources                               | Agriculture remains the backbone of the Kenyan economy, contributing 25% of GDP. About 80% of Kenya's population of roughly 42 million work at least part-time in the agricultural sector, including livestock and pastoral activities. |
| Revenue                                 | \$12.89 billion (2016 est.)   |
| Expenditure                             | \$17.85 billion (2016 est.)   |
| International tourist arrivals          | 1,114,100   |
| International tourism receipts          | \$723.0 million   |
| T&T industry employment<br>(% of total) | 592,300 jobs (3.5%)   |
| T&T industry GDP (% of total)           | \$2296.0 million (3.8%)   |
| TCCI ranking                            | 112/136 (2017), 109/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

**Table 6.6** Relevant tourism indices—Nigeria

|                                      |   |
|--------------------------------------|---|
| Nigeria                              |   |
| Population                           | 186,053,386   |
| GDP per capita                       | \$5900 (2016 est.)  |
| Resources                            | Oil has been a dominant source of income and government revenues since the 1970s. |
| Revenue                              | \$11.4 billion (2016 est.)  |
| Expenditure                          | \$21.21 billion (2016 est.)   |
| International tourist arrivals       | 1,255,000   |
| International tourism receipts       | \$403.9 million   |
| T&T industry employment (% of total) | 650,836 jobs (1.6%)   |
| T&T industry GDP (% of total)        | \$8282.8 million (1.7%)   |
| TCCI ranking                         | 126/136 (2017), 131/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

challenge, failure to exploit the abundant natural resources (61st) is an opportunity missed. The tourism sector in the country requires a holistic makeover as the country finishes outside the top 100 in 10 of 14 pillars. Government prioritization of the sector is very low (Table 6.6).

## Uganda

Uganda is the 106th nation on the standings, a significant improvement from 2015 when it was ranked 114th globally. However in 2015, the country still moved up 2 places from 116th in 2013, meaning the country has moved up 10 places in the last four years. These forward strides are backed by strong performances in price competitiveness (60th) and environmental sustainability (46th). Infrastructure is one of the main drawbacks with air transport (121st), ground and port (117th), and tourist service infrastructure (100th) still posing strong challenges (Table 6.7).

## South Africa

South Africa drops 5 places in 2017 to 53rd from 48th in 2015. However, this is still better than 2013 when it was 64th. South Africa remains on top of the sub-Saharan African log and this can be traced to

**Table 6.7** Relevant tourism indices—Uganda

|   |   |
|---|---|
| Uganda                                  |   |
| Population                              | 38,319,241  |
| GDP per capita                          | \$2100 (2016 est.)  |
| Resources                               | Uganda has substantial natural resources, including fertile soils, regular rainfall, small deposits of copper, gold, and other minerals, and recently discovered oil. |
| Revenue                                 | \$3.748 billion (2016 est.)   |
| Expenditure                             | \$5.41 billion (2016 est.)  |
| International tourist arrivals          | 1,303,000   |
| International tourism receipts          | \$1149.0 million  |
| T&T industry employment<br>(% of total) | 464,305 jobs (3.1%)   |
| T&T industry GDP (% of total)           | \$920.0 million (3.7%)  |
| TCCI ranking                            | 106/136 (2017), 114/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

strong performances in cultural resources (19th), business environment (21st), and abundant natural resources (23rd). However, concerns remain over longstanding issues of safety and security (120th) and environmental sustainability (117th), areas where the country is making little or no improvement (Table 6.8).

## Zimbabwe

Zimbabwe is ranked 114th out of the 136 countries moving up one place from 115 in 2015. The country also moved up 3 places in 2015 from 118th in 2013. The country is ranked relatively safe and secure (60th) and price competitive (53rd). Challenges include business environment generally (134th) and health and hygiene (128th) (Table 6.9).

From the above, sub-Saharan Africa is lagging in terms of competitiveness, with similarities across the components, highlighting the main challenges to be those of leadership, infrastructural provision, and destination development as well as human capital development; key challenges that need to be addressed to develop its tourism industry, harness its tourism potential and enhance its competitiveness.

**Table 6.8** Relevant tourism indices—South Africa

|   |   |
|---|---|
| South Africa                            |   |
| Population                              | 54,300,704  |
| GDP per capita                          | 13,200 (2016 est.)  |
| Resources                               | Exports include gold, diamonds, platinum, other metals and minerals, machinery and equipment. |
| Revenue                                 | \$76.62 billion (2016 est.)   |
| Expenditure                             | \$86.45 billion (2016 est.)   |
| International tourist arrivals          | 8,903,773   |
| International tourism receipts          | \$8234.7 million  |
| T&T industry employment<br>(% of total) | 702,824 jobs (4.5%)   |
| T&T industry GDP (% of total)           | \$9339.9 million (3.0%)   |
| TCCI ranking                            | 53/136 (2017), 48/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

**Table 6.9** Relevant tourism indices—Zimbabwe

|   |   |
|---|---|
| Zimbabwe                                |   |
| Population                              | 14,546,961  |
| GDP per capita                          | \$2000 (2016 est.)  |
| Resources                               | Zimbabwe's economy depends heavily on its mining and agriculture sectors. |
| Revenue                                 | \$3.4 billion (2016 est.)   |
| Expenditure                             | \$3.9 billion (2016 est.)   |
| International tourist arrivals          | 2,056,588   |
| International tourism receipts          | \$886.0 million   |
| T&T industry employment<br>(% of total) | 180,028 jobs (3.1%)   |
| T&T industry GDP (% of total)           | \$703.0 million (5.2%)  |
| TCCI ranking                            | 114/136 (2017), 115/141 (2015)  |

Sources: CIA Factbook and WEF: Travel & Tourism Competitiveness Report 2017

## Key Challenges and Strategies to Enhance Tourism Competitiveness

In this section, we focus on the key priority challenges together with recommendations to enhance tourism competitiveness in Africa. These are not all the challenges, but rather, addressing these challenges will galvanize the tourism industry and signal national commitment to the tourism industry, which will stimulate investment in the sector, and catalyze the growth of the industry.

## Leadership

The main impediment to tourism development in Africa is the lack of political will to prioritize the industry and actualize the implementation of tourism master plans. Leadership from the public as well as private sectors is required to catalyze the industry to what it can be (Heath, 2002). The potential role of tourism for economic development is known to most countries in the region but a lack of implementation of strategic and master plans continue to limit the progress in this sector. This can be traced to a lack of understanding of how to go about implementing and a lack of political will, which is made more challenging as a result of the fragmented nature of the tourism industry.

Enhancing the competitiveness of the tourism industry in Africa first and foremost requires the right type of leadership at all levels, but it needs to start at the highest level. Individuals in the highest positions of power need to be positive about the sector, and strategically decide and actualize the vision and objectives for the industry in their countries. These strata of leaders exist in both public and private sector organizations, and precipitates the need for collaboration between both private and public sector, to articulate and define what the tourism industry in their countries can look like. While the focus of this chapter is on competitiveness, at a destination and country level, there will be the need for cooperation between sub-regions to jointly innovate, develop and promote their destinations (Centre for Strategy and Evaluation Services, 2013).

Leadership is required to make decisions based on the availability of data, with which to set the vision for tourism and develop the requisite infrastructure needed to position the industry for success.

The right type of leader, individuals with a passion for, and understanding of, the nuances of the tourism industry, and the ability to see the tourism system holistically, given its multiple and somewhat fragmented nature in Africa. This requires a level of dynamism, innovation and adaptability to be able to set the vision for the industry/destination within the country. Government at the various levels needs to work together. Leaders also need to identify and work with various stakeholders to actualize the set objectives. Leadership is required to activate multi-level coordination and cooperation amongst the various tourism providers in a destination, and a country (where the country has several

destinations). Tourism associations and bodies have members who operate within the industry in the country. In many cases, these remain active, although they feel they are fighting a losing battle because of the fragmented nature of the industry. The tourism bodies can act as clusters, and amplify the voice of their members, as well as gain synergies from their shared interests, and utilize these to refine the objectives of the associations further.

Government intervention and extensive conversations with members of tourism associations and bodies can provide a useful way for learning, obtaining information, and multi-level engagement with private sector tourism providers. In this way, development plans will be developed with the contribution of existing tourism associations, with lessons to be shared and learnt that will inform future strategies.

Tourism leadership needs to be responsible, visionary and transformational, leadership that is able to understand multiple perspectives, accommodate them and motivate others to transcend their own purpose, by creating a common sense of purpose and provide a strategic focus for a destination and/or country (Bass, 1985). Without visionary leadership, the other strategies and suggestions provided below will not be attainable.

## Infrastructure Development

Sub-Saharan Africa underperforms on its infrastructural provision. According to the 2017 TTCL, the three major sub-regions, namely Southern Africa, East Africa and West Africa all performed very poorly as shown in the table below. The table also compares the performances with Europe, a top-performing region (Table 6.10).

The lack of adequate infrastructure, referring to power, and transportation, amongst others, is a major impediment to improving the current state of several industries, including tourism in Africa. Focusing on tourism, the continent lacks adequate air transportation and ground transportation infrastructure. Health and sanitation issues are a consideration for tourists, and the quality of available healthcare provided, and sanitation levels for water and sewage, is inadequate. There is a real



**Table 6.10** Comparative analysis: infrastructure development

| Regional averages              | Southern Africa | East Africa | West Africa | Western Europe |
|--------------------------------|-----------------|-------------|-------------|----------------|
| Air transport infrastructure   | 2.3             | 2.0         | 1.9         | 4.3            |
| Ground and port infrastructure | 2.7             | 2.6         | 2.5         | 5.5            |
| Tourist service infrastructure | 3.3             | 2.7         | 2.7         | 5.8            |

Source: WEF: Travel & Tourism Competitiveness Report 2017

need for political will, together with allocation of funds, cooperation and collaboration between inter-governmental ministries and the private sector, on how to develop infrastructure to stimulate the growth of industries, including the tourism industry (World Economic Forum, 2015).

In this sense, the provision of infrastructure is the single most important factor that can capitulate the growth and competitiveness of the industry in sub-Saharan Africa.

## Destination Development and Management

The first step in developing a vibrant tourism industry is to identify the destinations within the country that can be developed to be attractive to tourists. These can be historically important sites and communities, areas of outstanding natural beauty or leisure attractions, events and festivals that are designed to appeal to tourists, or a combination of some or all of these. According to the TTCI, Africa has abundant cultural and natural resources, although these are not always in a good enough state to be enjoyed. Therefore, the first step is to identify and scope out the tourist destinations in a country, evaluate its current state and undertake extensive research to determine the feasibility of various development options that are available to the destination.

Gathering and analysing the data is important to ensure that the decision-making process is one that is informed by empirical evidence. Relevant data categories include the state of the destination, the activities available to visitors beyond visiting the site(s) alone, the state of the

hospitality facilities in the destination, the number of visitor arrivals to a destination, average spend, trained personnel at the destination and guest feedback.

Destination development should be focused on increasing the attractiveness of the destination in a sustainable way. Attractiveness in this regard can relate to the educational, cultural and historical appeal of the destination. Coupled with this is the availability of ancillary activities at the destination, so that tourists visiting the main destination can also have several other locations within the destination with which to occupy their time, in this way contributing to the richness of tourist experience (Heath, 2002). Many tourist sites in Africa have a single main attraction with little to no leisure or hospitality services provided for the tourists to the site.

The destination once developed also requires management to ensure that the destination continues to be in good condition and that the activities available at the destinations provide tourists with a variety of options that will contribute to their overall experience. Data collected to monitor the visitor satisfaction will also contribute to effectively managing the destinations.

## Human Capital Development

The tourism industry is anchored on exceptional service delivery and hospitality. The quality of service, an intangible factor, received at various attractions in a destination may be a reason behind the attractiveness of one destination relative to another (Erdly & Kesterson-Townes, 2002). The tastes of travellers are becoming increasingly sophisticated, together with this, the need to provide quality service. As such, human resources at destinations needs to be developed. A destination may be made or broken by the quality of people that provide services to it. This is the need for human capital development.

The tourism industry in Africa is still in its developmental mode and this is evidenced by how working in the industry is perceived to be low-paid, informal and casual labour. Intensive job-specific training should be provided in all the components of the tourism system for staff, who will

provide the services required for a successfully run destination—ranging from tour guides, airport staff and customer service officers, to hotel and restaurant staff, as well as marketing, IT staff and finance professionals—to do so effectively. These, together with training on key skills such as interpersonal communication and team working skills, will contribute to the quality of service tourists receive (Tarlow, 2016).

Such training, together with a well-defined career path for all levels of staff, ensures tourism staff are equipped to provide good service. Moreover, it helps industry to attract and retain talent for technical and managerial professions, which will elevate the profile of tourism jobs and professions, as well as contribute to the further development of the tourism industry, in terms of people coming together to work on long-term planning, strategy and development of tourism destinations (World Economic Forum, 2015, p. 24). Countries should consider the provision of training and university courses and programmes aligned with their country's strategic tourism objectives (Anu Singh, Shalini, & Sona, 2009). Together with the change in perception and staff training, the working conditions for staff in the industry also need to be improved to prevent exploitation of staff, contributing to the improved perception of the industry (Tarlow, 2016; World Economic Forum, 2015).

## Expanding the Tourist Demand Market

Domestic and regional tourist demands are key markets that have not always received the attention they deserve across the continent, although there are some exceptions, including Kenya, which has promoted domestic and regional tourism. While the World Economic Forum argues that the focus of the tourism industry should be on attracting international tourists, given that the average GDP per capita in sub-Saharan Africa is less than US \$4000 (World Economic Forum, 2015), we argue that a focus on developing the tourism industry for international tourists alone is not sustainable in the long run. Ghimire (2001) makes a case for domestic and regional tourism, arguing that it contributes about 80 per cent of world tourism flows. Jumia Travel's report (2017) estimates that domestic and regional travel in Africa generated 63.7 per cent to tourism GDP in

2016, significantly higher than foreign visitor spending of 36.3 per cent. In South Africa for example, domestic tourism contributed to 56.4 per cent of total tourism spending in 2015 (Statistics South Africa, 2016).

As such, the focus on enhancing tourism competitiveness should be widened to domestic and regional, as well as international tourists. According to the Tourism Alliance's 2016 report, domestic tourism in the United Kingdom accounted for £22.2 billion of tourism expenditure, while inbound tourism accounted for £21.7 billion. This shows the potential for domestic tourism, which should not be overlooked in the development and promotion of the tourism industry in Africa.

Africa has a growing middle class, who are increasing their demand for travel to visit friends and relatives, experience nature, travel to learn more about other parts of a country or another country, and for relaxation. Domestic and regional tourism can contribute to social cohesion and aid rural development, providing employment in rural areas and stemming the rural to urban migration, together with the resultant negative social impacts that plague many developing countries. International tourism is usually seasonal, and domestic and regional tourism can be encouraged to counter this seasonality (Skanavis & Sakellari, 2011).

Domestic and regional tourism presents an important focus for consideration, moving the strategic tourism planning from focusing on international tourists from the global "North", who are argued to have spent more money, although the lack of reliable statistics means that the income and volume generated from national and regional tourists may be understated (Ghimire, 2001). The lack of consistency in classifying and separating regional tourists from international tourists also means that quantifying the number of regional tourists is difficult. We discuss later in the chapter, the importance of data collection and reliable statistics to decision-making for tourism development.

## Other Challenges to Be Considered

From the results of the TTCI above, other key areas for enhancing tourism competitiveness are international openness, safety and security, health and hygiene, ICT readiness and cultural resources.

## Segmentation of the Tourist Market

The first step towards enhancing the competitiveness of a destination is for the destination to define its intended tourist. This is linked to destination development and management. This will enable it to present strategies that will contribute to meeting the tourist needs of its target audience. Often, people are told to visit Africa, visit Nigeria, or visit Ghana. Yet, there is no unique tourist product advertised as the reason for which people should visit, as compared to destinations like Kenya, which markets its safari holidays; Zanzibar, known for its beach holidays and as a wedding destination; Northern Tanzania for the Serengeti; and so on. Uganda has made several advances in this regard by defining its tourism strategy towards luxury ecotourism and therefore appealing to tourists who seek to see its gorillas. This specific definition will enable it best communicate with its target tourists, those seeking wildlife and eco-luxury holidays.

It is important that destinations see the tourist as a co-creator of value and experience as opposed to a static person. In this way, destinations will need to continue to tell and re-tell their stories, looking at new and strategic ways to market and package tourist products to tourists. The focus of tourism destination development should be for the intended tourist. However, satisfying the interests of the tourist alone is not sufficient. Rather, destination development should also consider the issues and interests of other stakeholders including the local communities, employees of the industry and other tourism organizations that exist on the supply-side of the destination. Prior to marketing a destination, defining who its intended audience is essential in order to influence its development strategies and determine the marketing messages that follow.

## Safety and Security

While Africa appears to be attaining levels of relative political stability, the historical cases of military coups, post-election violence and terrorism attacks have marred its appeal as a tourism destination. Countries will

need to consider political stability and good relations within and between states to ensure potential tourists perceive the destination country (and the continent) to be a safe one. A concerted focus on improving security and communicating this across various media channels will contribute to enhancing the tourism competitiveness of destinations in Africa.

## Perception Management and Marketing

The media's stereotyping of the African continent over the years has affected the image the world, including Africans, have about the continent, its possibilities and its future. Tourist destinations seeking to attract demand will need to work together with public relations and government officials on how to change the perception people have of Africa, and inform them about what the continent has to offer its tourists. Destinations can work with the Africa Travel Association, which works to showcase the diverse destinations in Africa to a global audience.

Innovative marketing strategies have emerged in the industry, where marketing is tailored to various segments of the market. In this vein, the tourism destination needs to decide and outline their target market and identify the various mediums that will act as distribution channels to provide awareness of the image, quality, positioning, branding and services of the tourist products on offer. The marketing communication messages should be accurate and depict the true nature of the destinations, so as not to mislead the tourist (Crouch & Ritchie, 1999; Mihalič, 2000).

Tourists need to be made aware of the tourism products available in the destinations. The Internet has made it possible for destinations to promote themselves to a global audience very effectively and at a low cost, and destinations in Africa need to incorporate targeted marketing into their agenda. Destinations can market to a global audience in a sophisticated manner, tailored to the various audiences, using various portals to ensure that together with perception marketing, the destination is made as attractive as possible. This can convert awareness to demand and to a sale for a particular tourist destination, thereby enhancing the competitiveness (Mostafa et al., 2010; Poon, 1993).

Africa has diverse products ranging from its history, which can be repackaged to be engaging and priceless: its wildlife, natural beauty, colourful culture and traditions. Countries should look to the engagement of skilled storytellers who can present and retell the stories of the destinations in Africa to intended markets, and also bring the destination to life for tourists. Together with marketing, there need to be dedicated online resources providing information about the destination, how to get there and any activities happening at the destination and nearby, together with information about where to stay and eat. It would be useful to include the feedback received from guests in the form of videos that articulate what tourists—who should be from various origin markets—found enjoyable about the destination.

Feedback forms should be made available at the various exit points to provide a means through which tourists can leave comments, both positive and negative. This feedback needs to be taken on board and used to inform future decisions about the destination.

## Visa Policies

One of the factors inhibiting the travel of Africans within Africa is the lack of visa openness, which in some cases makes it easier for holders of European and American passports, among others, to travel more freely on the continent than can holders of passports issued in Africa.

In 2016, the first edition of the Africa Visa Openness Report, a report published by the African Development Bank (AfDB), reveals that on average an African national requires a visa on departure for 55 per cent of other African countries, can get visas on arrival in only 25 per cent, and does not need a visa for only 20 per cent of countries in Africa. The African Union's (AU) 2063 agenda calls for the creation of a single continental African passport by 2020. However, before the actualization of that plan, it calls for a visa policy that grants African nationals a visa-on-arrival in all African countries, which allows staying in the country for a minimum of 30 days, by 2018. Should it be successful, the AU's 2063 Agenda could have a profound impact on the growth of the tourism industry, as freer movement will contribute to an increase in demand for tourism on the continent.

## The Need for Data

The lack of reliable data in the tourism sector is another factor impeding its growth. Data is important to show how a destination is performing in terms of tourist numbers, receipts and the experience of the activities in the destination. Data is important in order to understand the factors, qualities and potential of a destination, to understand its limitations and to guide policy interventions and investment decisions. Investors can also count on reliable data as an assessment tool for determining areas with the best potential.

There are some data available on tourism in Africa, but in most cases, there is a lack of focus, incomplete categories and overall, the data is of poor quality. This dilemma has inhibited the ability of African destinations to monitor trends and patterns of tourism arrivals and as such cannot create a suitable strategy. The lack of data has also affected the assessment of the economic, social or environmental impact of tourism on the environment.

The TTCI is a useful measuring tool for countries in the tourism industry. However, to get a more objective evaluation of performances as well as growth assessment, African countries will need to produce their own reliable data. This can be done by engaging local researchers, who will source the data and gather feedback from visitors. This exercise will help boost accuracy of current data, track the development, management and sustainability of destinations, and monitor the effectiveness of marketing strategies, amongst others. The data obtained will also be useful in providing investors with reliable information as well as track the effectiveness of tourism leadership.

## Suggestions for Future Research

Given the increase in tourism activities in sub-Saharan Africa, it is surprising that the level of tourism research remains at an embryonic stage. Research is important to provide decision-makers with information gleaned from data collected. Yet, there is a scepticism towards research,



with the resultant effect on the amount of funding made available for tourism-related research projects. Other challenges to tourism research include the inadequate communications infrastructure and the need for reliable data collection methods for various fields ranging from population size, number of visitor arrivals and the foreign exchange earned from tourists by a destination (Moswete & William, 2012).

Tourism research in sub-Saharan Africa significantly lags behind those of developed countries with researchers expressing concerns over the concentration of scholarship and research in developed countries (Nunkoo, 2015; Nunkoo, Gursoy, & Ramkissoon, 2013; Tribe et al., 2013). In an investigation of the geographical location of authors of a leading tourism journal within a two-year period (2010–2011), Tribe et al. (2013) noted the under-representation of the African continent. Analysing recently published articles on the nature of knowledge in hospitality studies, Nunkoo et al. (2013, p. 269) noted that “results indicated that research is highly concentrated in the developed world, while the voices of developing nations are marginalized.” According to the authors, the pattern provides “some indication of underlying power dimensions in the production of hospitality knowledge” (p. 269).

What is required is greater cooperation amongst various governments, private–public partnerships and other supporting institutions for increased interest in tourism and hospitality research on the continent. We advocate for research at a more granular level focusing on some of the established TTCI criteria encompassing the internal and external factors that can enhance the competitiveness of a destination. Researchers can work together with the ministries of tourism to provide relevant and up-to-date research material that can inform future tourism policies and relevant agencies on implementation strategies.

## Concluding Remarks

Our chapter has provided an in-depth analysis of the tourism competitiveness of sub-Saharan Africa using data from the World Economic Forum Travel and Tourism Index. Tourism is a driver of socio-economic

development and can be a valuable industry to tackle some of the sustainable development challenges in Africa. However, political will is required to ensure that each country is able to develop its tourism industry in a focused manner that can enhance the tourism competitiveness of sub-Saharan Africa.

Concerted planning is essential. Destinations usually have several tourism master plans drawn up, showing the planning stage is correctly identified as crucial. Yet, planning must give way to implementation and it is in this light the tourism industry in sub-Saharan Africa continues to lag.

If we are to summarize the crux of our chapter in one sentence, it will be the need to develop holistic approaches to destination planning and management, to anticipate and meet the needs of tourists, to encourage collaboration between public and private sector organizations, and the need for a deeper understanding and appreciation of the role tourism can play in the economic, social and environmental spaces of nations. All these factors point to the need for visionary tourism leadership. A good example of how political will, together with visionary leadership and investments, can change a country's tourism industry is Dubai. The focus to create an alternative source of income for the country other than oil by concentrating on tourism has brought a lot of benefits. Dubai is now one of the most visited cities in the world and its tourism industry is expected to grow at an annual rate of 5.4 per cent over the next decade (The First Group, 2016). Following on from this improved perception of Dubai as a destination, several financial services organizations now have their head offices for the Middle East and Africa regions operating out of Dubai.

Many of the challenges identified in this chapter are longstanding. Enhancing the competitiveness of the industry requires the ability to learn from the past and look towards the future. Increased recognition of the importance of tourism and the exigent need to diversify will serve to expedite growth in the sector. It is our hope that tourism will play a major part in the economy of many African countries in upcoming years.

## Appendix: Pillars of tourism competitiveness by sub-indexes (2017)

| Pillars of tourism competitiveness by sub-indexes (2015) | Definition according to the World Economic Forum  |
|--|---|
| Sub-Index A: Enabling environment                        | The extent to which a country has in place a conducive policy environment for companies to do business.   |
| Pillar 1: Business environment                           | The level of safety and security, as danger deters tourists.  |
| Pillar 2: Safety and security                            | This includes access to improved drinking water and sanitation, together with provision that in the event that tourists do become ill, the country's health sector is able to ensure they are properly cared for, as measured by the availability of physicians and hospital beds   |
| Pillar 3: Health and hygiene                             | The availability of quality human resources in an economy. It relates to how destinations develop skills through education and training, and enhance the best allocation of those skills through an efficient labour market.  |
| Pillar 4: Human resources and labour market              | ICT is important for all sectors and contributes to the enabling environment of a country. Online services and business operations are important for planning itineraries, booking travel and accommodation.  |
| Pillar 5: ICT readiness                                  | This relates to the extent to which the government prioritizes the T&T sector, in terms of how funds are channelled to development projects and the coordination of the resources necessary for the development of the sector.  |
| Sub-Index B: T&T policy and enabling conditions          | Stable government policies are also important.  |
| Pillar 6: Prioritization of travel & tourism             | This relates to the degree of travel facilitation and openness in terms of visa requirements, access to the destinations and bilateral trade agreements.  |
| Pillar 7: International openness                         | Price competitiveness relates to the cost of accessing a destination and includes airfare ticket taxes and airport charges, which can make flight tickets much more expensive; the relative cost of hotel accommodation; the cost of living, proxied by purchasing power parity; and fuel price costs, which directly influence the cost of travel. |
| Pillar 8: Price competitiveness                          |   |

(continued)

|  |  |
|--|--|
| (continued)  |  |
| Pillars of tourism competitiveness by sub-indices (2015) | Definition according to the World Economic Forum   |
| Pillar 9: Environmental sustainability                   | This relates to how the natural environment is enhanced to ensure the destination provides an attractive location for tourism. It includes policies and enforcement of environmental regulations, and assessing the status of the natural environment.   |
| Sub-Index C: Infrastructure                              |  |
| Pillar 10: Air transport infrastructure                  | This pillar relates to air connectivity, which is essential to tourism. It measures 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.   |
| Pillar 11: Ground and port infrastructure                | This pillar relates to the availability of efficient and accessible transportation to key business centres and tourist attractions. It includes an extensive comfortable and secure road and railroad network.   |
| Pillar 12: Tourist service infrastructure                | Quality accommodation, resorts and entertainment facilities together with access to services such as car rentals and automated teller machines (ATMs).   |
| Sub-Index D: Natural and cultural resources              |  |
| Pillar 13: Natural resources                             | This includes the number of UNESCO natural World Heritage sites, the quality of the natural environment as measured by the total known species of animals, and the percentage of nationally protected areas.   |
| Pillar 14: Cultural resources and business travel        | Cultural resources are another critical driver of T&T competitiveness. This pillar includes the number of UNESCO cultural World Heritage sites, large stadiums that can host significant sport or entertainment events. It also includes a new measure of digital demand for cultural and entertainment—the number of online searches related to a country's cultural resources can allow the level of interest to be inferred. The number of international association meetings taking place in a country is included to capture some level of business travel. |

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