Africa Tourism Monitor

Unlocking Africa's Tourism Potential

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Africa Tourism
Monitor

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ACKNOWLEDGMENTS

Foreword

The African Development Bank (AfDB) is pleased to present this edition of the *Africa Tourism Monitor*, produced in partnership with New York University Africa House, and the Africa Travel Association (ATA).

Tourism continues to be one of the fastest-growing and most dynamic sectors of Africa's economy. In spite of recent challenges, including the Ebola outbreak in West Africa during 2014, the sector has tremendous potential to create jobs, boost inclusive economic growth across the continent, and reduce poverty.

With 1.133 billion global tourist arrivals in the past year, which represents a 4.3% increase over the previous 12 months, worldwide tourism activity has been at its highest level to date. Africa welcomed 65.3 million arrivals in 2014, which represents 5.8% of the total international arrivals figure. International tourism receipts rose to their highest level in 2014 at US$ 1,245 billion. With US$ 43.6 billion in receipts, Africa holds 3.5% of this global market share. One reason for this rise is the growing influx of new visitors from emerging economies in Asia, Central and Eastern Europe, all seeking to experience the cultural heritage, extraordinary wildlife, and dramatic landscapes unique to the continent.

In 2014, arrivals in Africa increased overall by 200,000 over the previous year. Arrivals in Egypt rebounded in 2014 with a 5% increase, equating to 454,000 more visitors than the prior year. Morocco maintained its record of surpassing 10 million arrivals for the second consecutive year. Additionally, Côte d'Ivoire shows promise with a 24% increase in arrivals, which means 91,000 more visitors than in 2013.
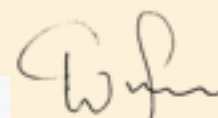
The African Development Bank recognizes, however, that it is not enough simply to sustain these growth levels, commendable though they are. What is equally important is sustained research and data generation to create the necessary knowledge base for effective decision making, policy formulation, and implementation in support of tourism, and hence economic growth and development. In this respect the Bank will sustain its pivotal role in collecting, managing, and disseminating tourism data alongside a plethora of other continent-wide statistics, through its Open Data platform.

We applaud the strides made in visa facilitation and regional cooperation by the implementation of the East African Community (EAC) Visa and the Southern African Development Community (SADC) KAZA Visa between Zambia and Zimbabwe. While we acknowledge the progress that has been made with these single visas, attempts to encourage free intra-African trade and movement of people in the ECOWAS sub-region must also be addressed. It is through free trade and ease of access that tourism will thrive.

In 2014, the African tourism sector faced tremendous challenges with the Ebola crisis. Although Ebola was confined to some countries in West Africa, stark ramifications were felt all across the continent with negative perceptions, decreased leisure bookings, and cancelations. It is clear that the tourism sector is interconnected to many facets of Africa's economy and society. While continuing to support traditional tourism infrastructure and systems, it is equally important to invest in supporting health systems, health and disaster preparedness, and crisis management systems. Only through such unified efforts can Africa's future as a competitive global tourism destination be safeguarded.

This unique collaborative effort between the African Development Bank, New York University Africa House, and the Africa Travel Association continues to highlight opportunities and challenges surrounding the tourism industry in Africa. Through the Africa Tourism Monitor we provide market-sensitive information and case studies to tourism stakeholders, planners, and practitioners in Africa to realize and unlock Africa's tourism potential. In this joint endeavor, we continue to highlight the role of tourism as a prime catalyst for spurring inclusive and sustainable economic growth across Africa. ✳

Dr. Charles Leyeka Lufumpa
Director, Statistics Department, African Development Bank Group

KEY TOURISM FACTS 2014

- Despite the Ebola crisis in West Africa, Africa international tourism arrivals increased to **65.3 million** in 2014.

- International tourism receipts in Africa totaled **US\$ 43.6 billion** in 2014.

- Destinations with the strongest growth in international arrivals compared to 2013 were **Egypt (+454,000), Morocco (+236,000), and Côte d'Ivoire (+91,000).**

- Africa holds a **5.8%** share in worldwide tourism arrivals, and a **3.5%** share of worldwide tourism receipts.

- Direct travel and tourism employment in Africa totaled **8.7 million** in 2014, which is a rise of 0.5 million over the previous year.

Sources: United Nations World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC).

Preface

Welcome to the 2015 edition of the Africa Tourism Monitor, a joint publication of the African Development Bank (AfDB), New York University Africa House, and the Africa Travel Association (ATA).

The theme of this issue is "Unlocking Africa's Tourism Potential," where we examine investment, conservation, product development, partnerships, and more in the sector, to foster economic growth and capitalize on opportunities.

This issue delves into a raft of timely topics, including trade policy and regional integration, regional visa cooperation and facilitation, hotel chain development, the economic value of wildlife tourism, knowledge and skills transfer, telling authentic stories on Africa, engaging local citizens, tapping into the online travel marketplace, and creating dynamic travel products.

The facts, figures, articles, and case studies in this issue illustrate how travel and tourism involve local populations and community stakeholders to participate, engage, and thrive in the travel and tourism sector in Africa.

We would like to thank all of our dedicated partners who contributed to this issue. It is through collaborations such as this that we can make a compelling case for unlocking Africa's tourism potential. ❋

**Professor
Yaw Nyarko**
Director, Africa House
New York University

Edward Bergman
Executive Director
Africa Travel Association

Africa Tourism: The Numbers

2014 proved to be another strong year for international tourism as a whole. With 1.133 billion arrivals – a 4.3% increase over 2013 – worldwide tourism activity has been at its highest level to date. Africa saw 65.3 million arrivals, representing 5.8% of total international arrivals in 2014. International tourism receipts worldwide also rose to their highest level at US$ 1,245 billion. With US$ 43.6 billion in receipts, Africa holds 3.5% of this market share.

Despite the Ebola crisis in 2014, Africa's tourism arrivals still increased by 200,000 over the previous year. Tourist arrivals in Egypt rebounded in 2014 with a 5% increase equating to 454,000 more visitors than in 2013. Morocco maintained its record of surpassing 10 million for the second consecutive year. Côte d'Ivoire also shows promise, with a 24% increase in arrivals, equating to 91,000 more visitors than the prior year.

Morocco, Egypt, South Africa, Tunisia, and Zimbabwe retained the 5 top rankings for most visited African destinations. Based on the prior two years' full reporting numbers, we anticipate that Algeria, Mozambique, and Kenya will appear again in the top most visited African countries.

Millions of Visitors to Africa

17.4 M — 1990
65.3 M — 2014

Top Five African Countries for International Tourist Arrivals in 2014 (millions)					
COUNTRY	2010	2011	2012	2013	2014*
Morocco	9.29	9.34	9.38	10.05	10.28
Egypt	14.05	9.50	11.20	9.17	9.63
South Africa	8.07	8.34	9.19	9.54	9.55
Tunisia	6.90	4.79	5.95	6.27	6.07
Zimbabwe	2.24	2.42	1.79	1.83	1.88

Note: In 2013, 2012, and 2011, the 5th country in Africa with the highest tourist arrivals was Algeria with 2.73, 2.63, and 2.40 respectively.
*Based on available data June 2015.
Source: United Nations World Tourism Organization: *UNWTO Tourism Highlights*, 2015 Edition.

International Tourist Arrivals (2014)*		
REGION	MILLIONS	PERCENTAGE OF GLOBAL TOURIST ARRIVALS
Europe	581.8	51.4%
Asia & The Pacific	263.3	23.2%
North America	120.4	10.6%
Caribbean, Central America, South America	60.6	5.3%
Africa	65.3	5.8%
Middle East	41.4	3.7%
Total	1,132.8	100%

*Based on available data June 2015.
Source: United Nations World Tourism Organization: *UNWTO Tourism Highlights*, 2015 Edition.
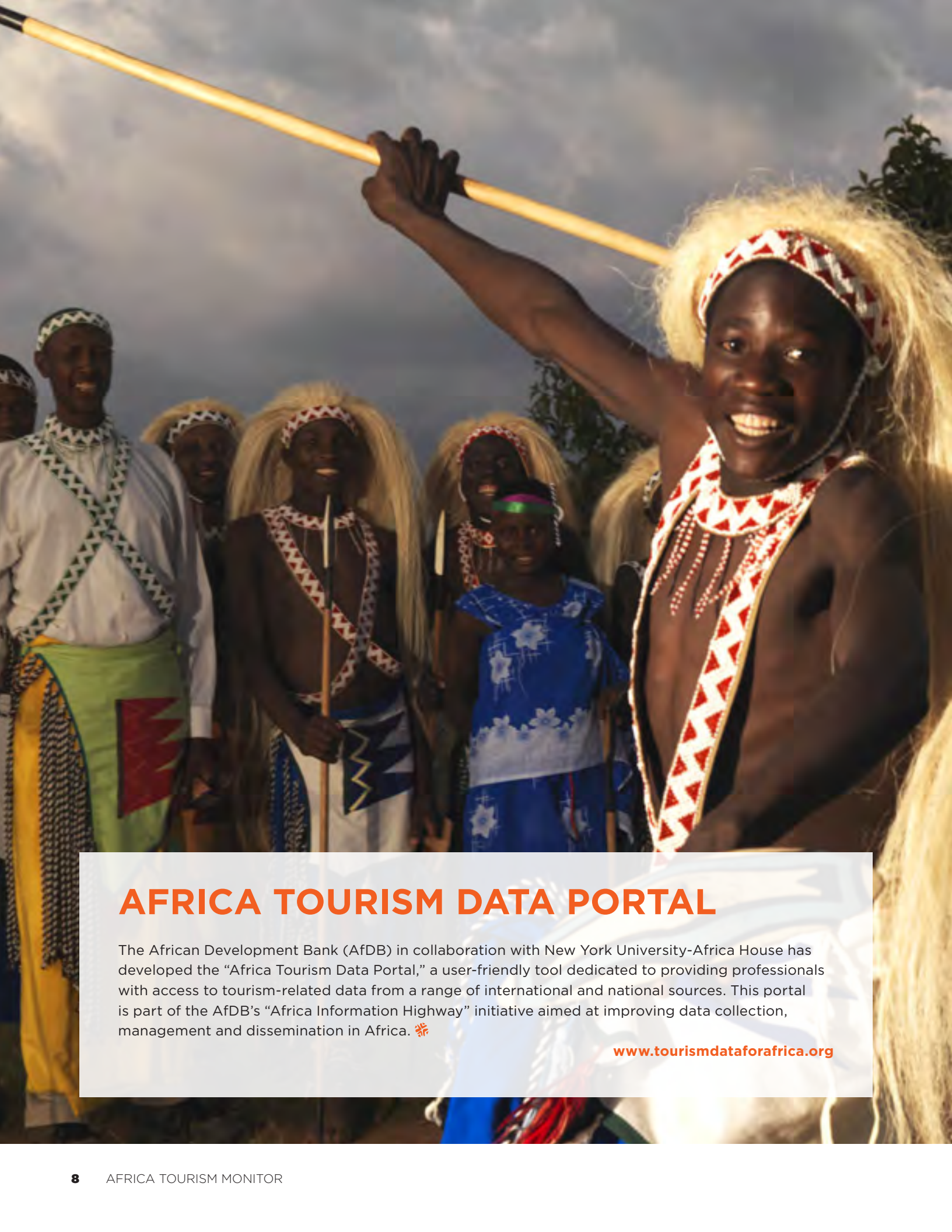
AFRICA TOURISM DATA PORTAL

The African Development Bank (AfDB) in collaboration with New York University-Africa House has developed the "Africa Tourism Data Portal," a user-friendly tool dedicated to providing professionals with access to tourism-related data from a range of international and national sources. This portal is part of the AfDB's "Africa Information Highway" initiative aimed at improving data collection, management and dissemination in Africa. ✿

www.tourismdataforafrica.org

TOURISM'S CONTRIBUTION TO EMPLOYMENT

The travel and tourism industry is responsible for directly generating 105.4 million jobs, equating to 3.6% of the world's total employment. Of this amount, Africa tourism generates 8.7 million jobs. When taking account of jobs supporting the travel and tourism industry, including indirect and induced, the number of rises to 276.8 million jobs, equating to 9.4% of the world's total employment. Africa tourism creates 20.5 million jobs, 7.1% of total employment on the continent.

Egypt, Ethiopia, Nigeria, Morocco, and South Africa have the highest numbers of direct tourism employment and of direct/indirect/induced tourism employment. The top-ranking 10 African destination countries account for approximately 75% of Africa's total direct tourism employment. Similar approximation holds true for the top 10 countries with the highest number of direct/indirect/induced employment.

Consistent with previous years, the small island nations of Seychelles, Cabo Verde, and Mauritius record the highest percentage of both direct and indirect/induced employment as a proportion of total employment in the continent.

Direct Employment in the Tourism Industry as a % of Total Employment (2014)

COUNTRY	% OF TOTAL EMPLOYMENT
World Average	3.6%
Africa	3.0%
North Africa	5.2%
SSA	2.5%
Egypt	5.2%

Source: World Travel and Tourism Council (WTTC).

Top 5 African Countries for Direct Tourism Employment as a % of Total Employment (2014)

COUNTRY	% OF TOTAL EMPLOYMENT	TOTAL EMPLOYMENT
Seychelles	22.9%	10,500
Cabo Verde	13.6%	30,000
Mauritius	10.9%	60,000
Morocco	7.1%	775,500
Tunisia	6.8%	230,500

Source: World Travel and Tourism Council (WTTC).

Top 10 African Countries for Direct Employment in the Tourism Industry (2014)

COUNTRY	'000 JOBS
Egypt	1,322.5
Ethiopia	979.0
Nigeria	883.5
Morocco	775.5
South Africa	679.5
Tanzania	467.0
Madagascar	340.0
Algeria	332.5
Mozambique	262.5
Sudan	248.0

Source: World Travel and Tourism Council (WTTC).

Top 5 African Countries for Total Tourism Employment as a % of Total Employment (2014)

COUNTRY	% OF TOTAL EMPLOYMENT	TOTAL EMPLOYMENT
Seychelles	57.3%	25,500
Cabo Verde	35.8%	79,500
Mauritius	24.2%	134,000
Namibia	19.2%	102,500
Madagascar	16.5%	882,500

Source: World Travel and Tourism Council (WTTC).

Top 10 African Countries for Total Employment (Direct, Indirect, Induced) in the Tourism Industry (2014)

COUNTRY	'000 JOBS
Egypt	2,944.0
Ethiopia	2,291.5
Nigeria	2,198.5
Morocco	1,740.5
South Africa	1,497.5
Tanzania	1,337.0
Madagascar	882.5
Mozambique	710.5
Algeria	660.0
Uganda	592.5

Source: World Travel and Tourism Council (WTTC).

Tourism Growth and Air

Tourism, perhaps more than any other sector, has the potential to achieve the vision and objectives of NEPAD and the AU Agenda 2063 as it can dynamize other sectors of the economy. Africa remains one of the fastest-growing bases for the travel and tourism sector globally. It is just behind the leading tourist destination, South-East Asia, according to the United Nations World Tourism Organization (UNWTO) report of 2014 (4% compared to 6%). The same report also suggests that the preferred mode of travel for most tourists (both from outside and within the African continent) is air transport (55.8 % for Africa as a whole and 36.2% for sub-Saharan Africa).

However, despite the positive developments witnessed in the last few years, the continent still faces a number of impediments to its growth and development. One of the key constraints that limits the effectiveness of the tourism industry to play a greater role in the national economies and hence the development and transformation of the continent is that of transport infrastructure and services. The challenge of air travel to and within the continent is well documented.

Journeys in the African continent are not always seamless. One of the major challenges to travel in Africa is stringent and restricted air service markets, designed to protect the share held by state-owned air carriers. Although many major airlines fly to Africa from North America, Europe, and Asia, once visitors reach the continent, they encounter difficulties in intra-Africa travel from East to West, and North to South.

The challenges associated with intra-Africa travel from the Cape to Cairo most of all, represent a huge barrier to the continent's economic progress. More so, tourism

services are subject to high transaction costs that can limit the appeal of travel within the continent. From a wider perspective, this can exert a negative impact on growth and job creation in the destination countries and regions of Africa. Despite the challenges, Africa remains one of the fastest-growing customer bases for the travel and tourism sector globally. In 2014, it ranked just behind the leading tourist destination, namely South-East Asia, according to the UNWTO report.

Travel and tourism represent 9% of the world's Gross Domestic Product (GDP) and one out of every 11 jobs. Tourism is growing faster than other sectors of the global economy and so has attracted significant support for its future development across the African continent. To this end, in 2004 Africa adopted the NEPAD Tourism Action Plan (TAP), which is a framework to foster sustainable tourism on the continent. The NEPAD Planning and Coordinating Agency, through the implementation of TAP, supports policies and a regulatory environment for tourism facilitation and the identification of key projects at the national and sub-regional levels. In addition, the Program for Infrastructure Development in Africa (PIDA), and other important continent-wide policies such as the Yamoussoukro Decision, also known as Open Skies for Africa, is bolstering efforts to promote the sector.

The Yamoussoukro Decision followed the 1988 Yamoussoukro Declaration, in which African countries agreed to the principle of air services liberalization. The African

Access within Africa

Ministers responsible for civil aviation in 1999 adopted the Decision. About 44 African countries committed to deregulate air services and promote regional air markets open to transnational competition. In 2000, the Decision was endorsed by Africa's Heads of State and Government Summit, and became fully binding in 2002. The envisaged positive spin-offs that the implementation of Open Skies for Africa could bring to the continent are too important to be ignored. Africa's aviation industry already supports 6.9 million jobs and contributes US$ 80 billion to GDP on the continent. Open Skies for Africa could create an extra 155,000 jobs and US$ 1.3 billion in annual GDP for the continent, if one quarter of African countries were to implement the Decision.

According to a 2010 World Bank report, liberalized air services lead to increased global trade, which is associated with competitive air carriers, more frequent flights, and lower fares. It opens the door to increased travel both within the continent and internationally. However, the implementation of Open Skies for Africa has fallen short. For example, some countries have not signed up to the Yamoussoukro Decision, or have failed to fully ratify it, while others that are signatories have not yet implemented it. Another factor that has curtailed its implementation is that some African countries have entered into Economic Bilateral Partnership Agreements (EBPA) with airlines from other continents, which conflicts with the spirit of the Yamoussoukro Decision.

If the continent is to reap the rewards of air services liberalization, the barriers to achieving a smooth travel environment have to be removed. The first imperative is for all African countries to support the implementation of the NEPAD Tourism Action Plan. The second action that needs to be taken is for those African countries that have not yet committed to ratifying the Yamoussoukro Decision to do so, and for all countries to push for its implementation. Lastly, all countries need to support the African Union Commission's (AUC) proposal for the establishment of a single African air transport market by 2017.

The future is bright! It is now in our hands to take the bold actions to make tourism a key driver for creating jobs, promoting cultural exchange, and therefore contributing to the transformation and regional integration agenda of the continent. ✵

Dr. Ibrahim Assane Mayaki,
Chief Executive Officer,
The NEPAD Planning and Coordinating Agency
www.nepad.org

Regional Visa Cooperation

Supporting visa facilitation, including e-visa and regional visa cooperation, has led to immense economic benefits for those countries that have adopted this approach. This has been confirmed by a 2014 study undertaken jointly by the World Travel & Tourism Council (WTTC) and the United Nations World Tourism Organization (UNWTO). At a time when most African leaders are seeking to boost job creation and economic development, visa facilitation systems and policies can augment tourism revenues and increase employment by levels of 5% to 25%.

Although the WTTC & UNWTO study on visa facilitation was conducted across 50 ASEAN countries, there are many "lessons learned" which can be applied to the African context. Indeed, in 2014 several African countries had taken note of the report's findings, and began to take action. Two of the recent forays into regional visa facilitation are by the East African Community with its single East Africa Visa, and the Southern African Development Community's (SADC) KAZA Visa between Zambia and Zimbabwe. Both efforts have completed their initial stages, and are programs to watch and emulate.

The Kavango-Zambezi Visa (KAZA Visa for short) grew out of an earlier (1998) expressed desire by SADC Heads of State to establish a UNIVISA amongst all the countries in the SADC region. Their hope was that one day, with one visa, a tourist could transit all 15 SADC countries. This dream is not yet a reality, but the KAZA Visa for tourists between Zambia and Zimbabwe is a promising start. This visa facilitation initiative is a pilot project which began in November of 2014, and ran through May 2015 under a World Bank grant of US$900,000. Other than some customer service issues, as noted on Trip Advisor and other social media, this KAZA Visa pilot project appears to be a success. The pilot term of the project has ended, and positive reports on economic indicators related to the project are anticipated, that will align with the ASEAN country successes with visa facilitation. The next stage of the project, adding a further three (3) countries to this single visa, is highly anticipated by all in the SADC tourism industry.

and Facilitation

The East African Community (EAC), not to be left behind, launched a single visa called the EAC Visa in February 2014, engaging Kenya, Uganda, and Rwanda. This initiative allows tourists to purchase a visa at the border, and then enter the other two countries on the same visa, for $100 in total, for a maximum 90 days. In March 2015, The New Vision reported that there had not been a massive demand for this three-country EAC Visa. This may be due to the overall muting of foreign travel across the continent, following the Ebola crisis in 2013-2014. Time will tell. There were some complaints on several social media sites demonstrating a lack of awareness about the EAC Visa, the inability to procure the visa online, long queues at borders, and a lack of clarity as to whether an ink stamp provided at some border posts was actually a valid EAC Visa. As the EAC Visa implementation evolves, there will be room for improvement, but despite a few bumps in the road to date, it is an excellent first step. It should be noted that Uganda and Rwanda's tourism receipts (visitor exports) increased by 12% and 8% respectively in 2014, as reported by WTTC. This aligns to similar gains achieved by improved visa facilitation elsewhere in the world. With renewed marketing efforts underway currently to promote the EAC Visa by the three countries, it is hoped that greater gains in tourism will be achieved.

These are two examples of first steps by two regional organizations to increase tourism by visa facilitation. As other African regions and countries examine their own visa facilitation regimes, it is envisaged that further tourism gains can be achieved across the continent for the benefit of all African governments and populations. ❉

Barbara Keating,
President,
Computer Frontiers, Inc.
www.computer-frontiers.com

Computer Frontiers
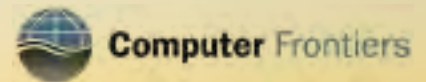
Tapping Into the Online

In the past decade the way the world researches, plans, books and shares travel has changed at an unbelievable pace. Not only are smartphones and wifi more accessible globally, emerging middle classes are packing their suitcases and international travel continues to grow. According to PhoCusWright, 42% of travel booked around the world in 2015 is expected to occur online. While this means more than 50% is still booked offline, this trend is changing and companies like The Expedia Group are helping aid this growth.

The Expedia Group brand, Hotels.com® opened its first African point of sale in 2004 and since then has been helping to aid travel growth within Africa but also driving international travelers to Africa from many of the companies' leading travel brands which span 150 travel booking sites in 70 countries. The African countries receiving a majority of demand for the last 12 months ending March 31, 2015 include: Morocco, South Africa, and Egypt, which collectively represent more than two-thirds of the demand. The top cities by net room nights include: Marrakech up nearly 20% YOY, Cape Town up nearly 25% YOY, and Tunisia up over 45% YOY. Cities with the highest YOY growth for the same period include: Cairo, Hurghada, and Inland Provinces, South Africa.

Travel Market

International demand to Africa is driven primarily by three countries including: USA, United Kingdom, and France. For the last 12 months ending March 31, 2015, these three countries represented nearly 60% of demand which is up more than 25% YOY. The 3 countries with the largest YOY demand growth for the same period include: South Africa, Turkey, and USA. Mobile bookings are on the rise across the globe and Africa is no exception. For the last 12 months ending March 31, 2015, the mobile share of net room nights is 15%. Mobile demand is spread equally across all days of week with nearly 40% booked 3 days or less prior to arrival.

Expedia
www.expedia.com

Expedia
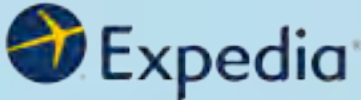
Top African Destination Countries over Last 12 Months

- Tanzania 4%
- Tunisia 8%
- Egypt 17%
- South Africa 24%
- Morocco 28%
- Other 20%
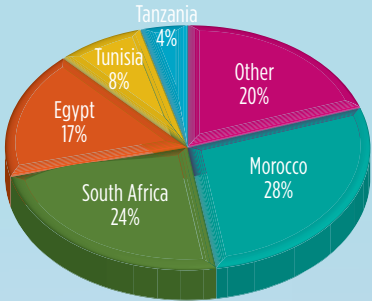
Top Feeder Markets into Africa

- South Africa 6%
- Germany 5%
- France 17%
- UK 19%
- USA 22%
- Other 30%
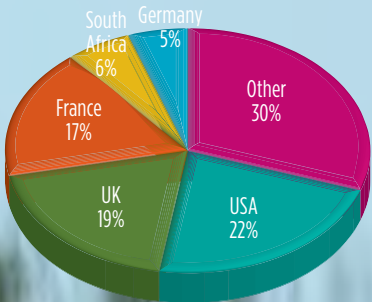
Delta Air Lines Engaging the African Diaspora Communities

In demonstrating its leadership in the global aviation industry, Delta Air Lines consistently displays its commitment to Africa through network expansion and increased participation in community events. Delta Air Lines continues to maintain its leadership role as the first American airline to fly to Africa through its firm belief in the economic viability of the continent as the fastest growing economy in the world.

In 2006, Delta Air Lines began service to Johannesburg from Atlanta via Dakar; however, today it currently serves four major destinations in Africa, which include Johannesburg, Lagos, Dakar, and Accra, in addition to routes served by its Skyteam partners. Today Delta Air Lines provides more than 400 flights connecting the U.S. and Canada to Africa.

The strategic approach of Delta Air Lines is to continue to meet the demands of the increasing number of African immigrants in the U.S. who travel to Africa either for personal or business reasons. The U.S. Census Bureau shows the significant growth in the population of sub-Saharan African immigrants in the U.S. In 2013 there were over 1.5 million African immigrants in the U.S. compared to only 129,900 in 1980. This is a market not to be ignored by the airline industry.

The research indicates further that as of 2013, 78% of the sub-Saharan Africa immigrant population was predominantly from Eastern and Western Africa. Nigeria has the highest share with 16% of the total immigrant population.

To meet the growing demand through seamless connections for African travelers, Delta has entered into a strategic joint venture with Air France and KLM to enable it to cover more destinations to Africa than any other American carrier. Today, Air France and KLM serve more than 33 nonstop flights from Paris and Amsterdam to 40 African cities.

In line with the African adage that "charity begins at home" and its commitment to build trust and confidence

Figure 1.
Sub-Saharan African Immigrant Population in the U.S., 1980-2013

Year		
1980	👤👤	(129,900)
1990	👤👤👤	(264,800)
2000	👤👤👤👤👤👤👤	(690,800)
2006	👤👤👤👤👤👤👤👤👤👤👤	(1,114,200)
2010	👤👤👤👤👤👤👤👤👤👤👤👤👤	(1,326,600)
2013	👤👤👤👤👤👤👤👤👤👤👤👤👤👤👤	(1,503,400)

0   500,000   1,000,000   1,500,000

Number of immigrants
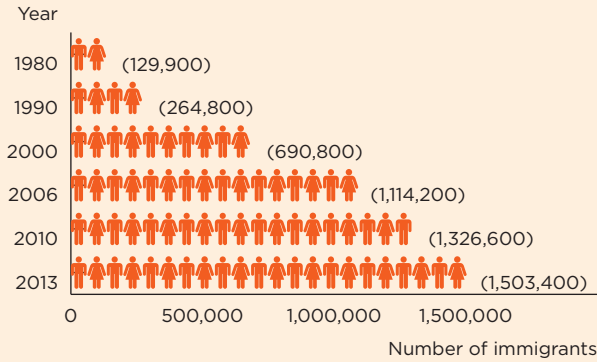
Source: Data from U.S. Census Bureau 2006, 2010, and 2013 American Community Surveys (ACS), 2000 Decennial Census, and Campbell J. Gibson and Kay Jung, "Historical Census Statistics on the Foreign-born Population of the United States: 1850-2000" (Working Paper no. 81, U.S. Census Bureau, Washington, DC, February 2006).

within the African communities in the U.S., Delta consistently supports African community events and non-profit organizations, through the African Specialty Sales Department in the U.S. In the first part of 2015, Delta sponsored more than 20 community events, which included:

- FestAfrica, a Pan-African festival organized annually in Silver Spring, Maryland that attracts over 5,000 attendees from all over Africa;

TABLE 1: Distribution of Sub-Saharan African Immigrants to the U.S. by Country and Subregion of Origin, 2013

Country and Subregion	Number of Immigrants	Share
Sub-Saharan Africa Total	1,503,400	100%
Eastern Africa	530,000	35%
Eritrea	33,900	2%
Ethiopia	195,800	13%
Kenya	110,700	7%
Other Eastern Africa	189,600	13%
Middle Africa	111,900	7%
Cameroon	46,600	3%
Other Middle Africa	65,300	4%
Southern Africa	98,300	7%
South Africa	95,200	6%
Other Southern Africa	3,100	0%
Western Africa	647,200	43%
Cabo Verde	30,700	2%
Ghana	149,400	10%
Liberia	78,900	5%
Nigeria	234,500	16%
Sierra Leone	37,600	3%
Other Western Africa	116,200	8%
Africa, n.e.c.	116,000	8%

Source: Migration Policy Institute (MPI) tabulation of data from the U.S. Census Bureau 2013 ACS.

- The 10th Anniversary of the Nigeria Entertainment Awards, which is the biggest entertainment event of any African country in New York City;
- The 1st Curious on Tanzania Festival in New York City;
- The Asantehene Ghana Day in Atlanta, GA;
- The African Women's Entrepreneurship Initiative of the Georgia Institute of Technology; and
- Eko Club International.

Through community engagement events such as these, Delta has participated in programs that have touched over 10,000 African immigrants in New York, New Jersey, Atlanta, and Silver Spring. It is projected that at the end of 2015, Delta will have reached over 30,000 members of the African Diaspora community.

Delta's commitment to value-driven community relations transcends far beyond U.S. borders. Delta collaborates with many non-profit organizations in Africa to provide humanitarian assistance and fight infectious diseases. Delta provides blankets to orphans in South Africa and works with the Red Cross in Ghana to organize campaigns to fight malaria. In Ghana, Delta also collaborates with the Young Educators Foundation to co-sponsor the annual Spelling Bee contest.

To foster educational development and promote business integration, the Delta Air Lines Intern Program works with local business schools in Nigeria, Ghana, Senegal, and Kenya to provide real world opportunities for interns to learn about global business skills in the areas of sales, project management, and analytical research.

Delta will continue to set examples for others through its policy of transparency and a strong belief in building lasting and credible relationships with the African immigrant community by providing quality services to meet their travel needs while also supporting events that celebrate African cultural heritage. ❄

Rafiu Afolabi Laguda,
Sales Account Executive, African Specialty Sales,
Delta Air Lines
www.delta.com

AFRICA'S DIVERSE TRAVEL EXPERIENCES

Why do we love Africa? Raw and refined, complex and simple, inspiring and troubling – Africa always has the power to confound, and that is why we love it so. With each successive trip, whether climbing to remote rock-hewn churches, trekking on snow-capped peaks, studying the behavior of its incredible wildlife or spending time with diverse African communities, our affection for the continent that spawned humanity grows deeper, as does the knowledge that there

is even more we have yet to discover. Much like its horizons, the opportunities in Africa are endless. And that is the reason it keeps pulling us back over and over again.

All of you who visit Africa regularly know that the range of travel experiences continues to grow year on year. New festivals celebrate African culture, music, and food. Well thought-out adventure activities, such as the South Africa's Cape Canopy Tour, are now thrilling visitors, while

safari operators across southern and East Africa continue to expand their offerings beyond traditional wildlife drives. Greater effort is being made by operators and communities to help visitors understand the environments they are taking in, whether these are urban or rural. Importantly, the number of responsible tourism options is higher than ever before, allowing visitors not only to enrich their lives, but also the destinations they are exploring. The numerous

community-owned conservancies in Kenya are an example, where tourism is benefiting traditional cultures as well as contributing to wildlife conservation.

To travelers who have yet to visit the continent, Africa is often a place of childhood dreams. Through cartoon books, toys and images, millions of children are introduced to elephants, hippos, lions, leopards, cheetahs, giraffes and zebras before they can even walk or talk. And countless youngsters go on to associate African destinations, whether Timbuktu, the Serengeti, Egypt's pyramids, the Sahara Desert or the mighty Nile, with excitement and mystery long before they can find them on a map. In terms of inspiring travel, no other continent has such a head start.

However, by the time prospective travelers are of the age to start booking their first trip to Africa, they are often derailed when forced to reconcile their whimsical dreams with the very different version of Africa portrayed in the world's media. We believe the key to overcoming this obstacle is by helping tourists understand the reality of travel in Africa. And that is what Lonely Planet hopes to achieve with our guidebooks, magazines, and website, all of which are researched exhaustively on the ground in each and every destination. Our aim over the past forty years has never been to tell people where or where not to go, but simply to provide travelers with the trusted, accurate, and up-to-date information that they will need to make the decisions that

are right for them. Perhaps that is why we have become the most successful travel media company in the world.

The key to unlocking Africa's tourism potential is not just showcasing travel experiences, but making them accessible to the traveler. Once this is achieved, dreams soon turn into enriching experiences. ✳

Matt Phillips,
Destination Editor,
Sub-Saharan Africa,
Lonely Planet
www.lonelyplanet.com

Knowledge and Skills Transfer

It is a pleasure to share my reflections about the power of knowledge and skills transfer to support the tourism industry. Knowledge being an indispensable asset for creating and sustaining competitive advantages in the airline industry, we at Ethiopian have positioned Human Resource Development among the four pillars of our 15-year growth plan, dubbed Vision 2025.

Ethiopian Aviation Academy is a pioneer aviation training center in the African continent and the region, which has served the demand for skilled aviation professionals over the past five decades. The academy has been the backbone of Ethiopian Airlines by producing a highly trained, qualified and dedicated workforce. Since its inception in 1956, the Ethiopian Aviation Academy has proved itself to be a center of excellence, developing a skilled workforce for the operational divisions of not only the Ethiopian, but also the wider African aviation industry.

Driven by the airline's commitment for self-sufficiency, and to meet the growing demands for training from clients around the world, the academy has continued to expand in both capacity and staffing over the years. Currently, the academy trains 1,300 aviation professionals per year. Besides ensuring self-sufficiency in terms of nurturing trained airline staff, our academy has been rendering service to third parties: pilots, aircraft technicians, cabin attendants, marketing and ground operations personnel, with one-third of its annual intake comprising trainees from 48 countries from the Middle East, Africa, and Europe (UK, Italy, Greece, and Israel). By 2025, our academy targets to increase its annual intake capacity to 4,000.

Pursuing our vision of aviation technology leadership in Africa, we have undertaken mega projects to expand and enhance the academy. We have also acquired the first ever B-787 Dreamliner full flight simulator in Africa. Pilot training on this flight simulator started in March 2015, which made Ethiopian Airlines the first in Africa to train pilots on this state-of-the-art facility.

Currently, Ethiopian deploys more than 9,000 employees that are mostly the fruits of this age-long academic institution; dedicated to support the fast, profitable, and sustainable growth strategy of the Ethiopian Airlines Group and contribute to the development of the aviation industry in Africa.

Ethiopian also provides management and technical assistance to other airlines on a secondary basis through availing trained and skilled manpower in different areas related to the airline industry. This practice ensures knowledge and skills transfer to fellow African countries: Rwanda,

to Support Tourism Industries

Cameroon, Equatorial Guinea, Mozambique, and Cabo Verde. ASKY and Malawian Airlines are also showcases that depict our commitment for a continued aviation knowledge and skills transfer to fellow African airlines.

With air transport being a vital component of the tourist appeal and the driving factor for economic growth in general, we have been serving our beloved continent for seven decades, offering convenient connectivity options to more than 50 African cities. This has enabled us to reach prominent tourism sites in Africa: Seychelles, Mombasa, Zanzibar, South Africa, and many more, served with the most technologically advanced and most comfortable aircraft such as the B-787, B-777 and Q-400. Ethiopian has also played a pivotal role in connecting Africa with the rest of the world through an extensive network covering more than 90 international destinations across five continents.

Today, Africa is on the rise, hosting the newly emerging, fastest-growing economies and youngest populations, which should serve as a springboard to a better future for the region. As tourism has a versatile role to play in the socio-economic development of a nation, Africa's huge potential for human capital could be transformed into opportunities to exploit the economic merits embedded in the sector. The growth in the tourism industry in Ethiopia,

for instance, has driven for the emergence of modern hotels, lodges, tour operators, and other tourism-related service providers; thereby creating job opportunities for fellow citizens and contributing to the overall growth of the national GDP.

Africa has so much to offer: from the diverse cultural heritages and historic features to the unique natural attractions that charm and amaze travelers around the globe. With a view to unlock Africa's tourism potential and make the tourist traveler enjoy the leisure, cultural, historical and natural sites, we have designed tourism packages and our in-house tour operations department, Ethiopian Holidays, to avail accessible, affordable, and attractive tour packages that meet our customers' high expectations to explore Ethiopia end to end.

As an African airline, it has always been our source of pride to connect Africa together, and beyond. ✳

Tewolde GebreMariam,
Chief Executive Officer,
Ethiopian Airlines
www.ethiopianairlines.com

Virgin Limited Edition's Community Devel

The nature of the Virgin Limited Edition properties means that we operate in some very different environments, not just in the physical sense but also culturally and economically. Across our African portfolio, which includes Ulusaba in South Africa, Kasbah Tamadot in Morocco, Mahali Mzuri in Kenya, and our recent acquisition Mont Rochelle in South Africa, we are fully committed to sustainable development and our responsibility towards the environment, in addition to supporting the local communities in which we operate. We aim to combine luxury with experiential and tailor-made travel, believing that many of our guests value excellent service and non-traditional hotel settings with an interest in our charitable initiatives.

Kasbah Tamadot

When Sir Richard Branson purchased Kasbah Tamadot in November 1998, we embarked on a major refurbishment program of the building. In parallel, we set up free English classes for the locals in the community surrounding the hotel, irrespective of whether they wanted to apply for a job at Kasbah Tamadot. Most of our staff had never been formally employed prior to joining our team and rather than recruit experienced staff from nearby Marrakech, our feeling was in the long term everyone would win if we focused on the resources on our doorstep. Today we employ 120 local staff, 90% of which are Berber and we have 48 staff who have been with us since day one. Figures suggest that each individual employed at the hotel supports up to 10 others in his or her extended family.

Kasbah Tamadot also supports The Eve Branson Foundation, which aims to help the local people in setting up long-term sustainable enterprises. These have included initiatives such as a carpet workshop and a crafthouse managed by locals. Since its inception in 2008, The Eve Branson Foundation has raised over 3.5m Dirhams, completed two crafthouses, and supports three villages with 90 local women in training and/or work.

At both Kasbah Tamadot and Ulusaba, we are proud members of Pack for a Purpose, an initiative that allows travelers to make a lasting impact in the local community. Prior to their visit, guests can check which local initiatives need their support and then bring essential items that are needed in the nearby villages. At Kasbah Tamadot, we support the Asni Crèche, a boarding house for girls, and two Eve Branson Foundation Crafthouses; whilst at Ulusaba we support the Dumphries Community

opment & Empowerment Initiatives

Teacher Resource Centre and Mawewe High School.

Ulusaba

At Ulusaba Private Game Reserve in South Africa, 100% of the staff are from South Africa. Ulusaba buys 99% of its necessities from South Africa, including crafts, toiletries, wine, and linens.

Members of the Ulusaba Team founded Pride 'n Purpose, a charity that supports the local community. Working on a non-profit basis, Pride 'n Purpose is Ulusaba's charitable arm committed to helping disadvantaged communities living adjacent to the Sabi Sand Reserve. Originally established in 2003, all the charity's running expenses are covered by Virgin Limited Edition and Virgin Unite, the Virgin Group's non-profit foundation. 100% of donations go directly toward much needed projects. We estimate that Pride 'n Purpose now benefits over 35,000 people across six communities. Our philosophy is that people are most effectively helped if they are empowered to help themselves, so the emphasis is most definitely on sustainable initiatives. Most of the work Pride 'n Purpose does is divided into four key areas:

• Access to clean and safe water
• Education at all levels
• Extracurricular activities for children
• Support for local entrepreneurs

Mahali Mzuri

The foundations for Mahali Mzuri were first laid in 2007, when in June of that year Richard was made an Honorary Maasai Elder, a traditional honor the tribe chose to bestow on him in return for bringing prosperity to the land. Located in the private Olare Motorogi Conservancy, a key component to our conservancy at Mahali Mzuri is to ensure the community sees the direct benefit of conserving the land. We aim to have a minimal footprint on the land and promote high-value, low-density tourism which creates less pressure on the environment. The basic concept of the conservancies and Mahali Mzuri is to guarantee a fair income to every landowning member, regardless of tourism numbers. The conservancies are governed by a rule of 1 bed to 150 hectares, ensuring low-impact tourism and also an exclusive safari experience.

Guests at Mahali Mzuri often take advantage of our community tours to one of the local Maasai villages, where our guides introduce them to local families who explain their cultures and traditions, and teach them how the houses are built. Particularly popular with our younger guests is the opportunity to interact with newborn lambs and goats.

We are committed to ensuring long-term success by doing business in an ethical and responsible way and our sustainability and community initiatives are at the forefront of our business. �֎

Virgin Limited Edition
www.virginlimitededition.com

Africa House Rural Tourism Development

Through programs at Africa House at NYU, students and faculty have converged in the rural community of Kumawu, Ghana, to spearhead innovative research on rural tourism, technology, and greening in the community.

Focus on Rural Tourism and Greening in Ghana

The research of Africa House and the Center for Technology and Economic Development (CTED) focuses on rural tourism and the greening potential of under-developed areas around Africa. Rural destination pilot sites are being selected to develop projects that preserve and highlight the rich traditional history and culture in Ghana.

In addition to cultural preservation, through the GIS mapping project, local maps of the Bomfobiri Wildlife Sanctuary have been created to highlight the flora and fauna present within Kumawu in the Ashanti region of Ghana. By focusing on the development of rural tourism sites in areas like Kumawu, Africa House creates opportunities to attract tourists from urbanized areas like Accra and Kumasi. Rural tourism not only engages visitors in citizen diplomacy and cultural exchange, but also exposes visitors to the vast ecological resources in the area.

In December 2015, Africa House, in collaboration with the Ghana Ministry of Culture, Tourism, and Creative Arts, will inaugurate the tourism and research projects in Kumawu.

Field Learning Experience in Kumawu, Ghana

During the summer of 2015, students joined a team from New York for an internship focused on rural tourism and technology at the Kumawu CTED Research Center. Led by Professor Yaw Nyarko, Director of Africa House and CTED, a team of faculty and students participated in a test run of interventionist mobile app solutions to further enhance their impact. To date, the mobile apps have been tested in Ghana, Asia, the Middle East, and America.

Kumawu Research Center Projects

The Kumawu Research Center houses several research projects that aim to tackle a wide range of developmental problems such as:

- Mobile App Design for Economic Development
- Agricultural Commodities Markets & Exchanges
- GIS Mapping in Agriculture and Tourism

Presently, Africa House focuses on programs and research in economic development, politics and theory, interventionist technological apps, commodities markets and exchanges, rural tourism development, and migration, involving NYU students and faculty in diverse ways to enhance their education and experiential learning.

Africa House's affiliate Center for Technology and Economic Development (CTED) is a research center at New York University that focuses on the development of innovative and cutting-edge technologies that significantly impact economic development, with a specific focus on problems faced in under-developed areas around the world. ✳

Kingsley Essegbey,
Assistant Director, Student and Community Relations
Andrea Papitto,
Assistant Director, Africa Trade and Tourism
NYU Africa House
www.nyuafricahouse.org

and Greening Projects in Ghana

To Support Africa's Wildlife Watching

International tourism continues to be a leading sector in the world, contributing decisively to socio-economic growth and inclusive development.

In 2014, despite an uneven economic recovery and emerging geopolitical challenges, international tourism grew by 4.3% to reach a new record of 1.133 billion tourists traveling the world. International tourism contributed US$ 1.5 trillion to global exports, or an average of US$ 4 billion a day, accounting for 6% of all exports in the world.

Africa – One of the World's Fastest-Growing Tourism Regions

Africa has been one of the fastest-growing tourism regions over recent years. In 2014, international tourist arrivals to the region grew by 2% to reach 56 million, up from only 26 million in 2000.[1] Income generated

1   UNWTO figures do not include Egypt or Libya tourism arrivals.

from international tourism grew to an estimated US$ 36 billion.

For many African countries, tourism is a principal export and a recognized development tool. With its impressive landscapes and abundant natural resources, many destinations in Africa enjoy a distinct competitive advantage in tourism, helping to empower local communities across the region by delivering numerous opportunities for employment, entrepreneurship, and sustainable livelihoods.

Protecting Africa's Unique Wildlife

One of the most important tourism segments in Africa is "Wildlife Watching Tourism." Yet, African wildlife is facing one of its greatest crises in decades, with the illegal poaching and trade of protected animals reaching alarming levels. Poaching not only affects Africa's unique wildlife, it disrupts entire ecosystems, effectively depriving many local communities

of their livelihoods and threatening the very future of Africa's socio-economic development. Indeed, the loss of biodiversity is directly linked to lost development opportunities in the African tourism sector, which is an economic backbone supporting millions of people.

In support of international efforts to tackle unprecedented levels of poaching and to strengthen the role of tourism vis-à-vis wildlife crime, UNWTO is spearheading efforts to increase knowledge on the economic value of wildlife watching in Africa. The UNWTO 2014 report "Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa" provides a first overview of this segment, its economic impact, and the current involvement of tourism in anti-poaching measures.

The report, undertaken in collaboration with the Convention on Migratory Species of Wild Animals (UNEP/CMS), shows that wildlife watching represents 80% of the total

Tourism is to Promote Development

annual sales of trips to Africa, with safaris being the most popular product. Elephants and rhinoceros, the species most threatened by poaching, are among the most popular animals in wildlife watching tours.

The report also highlights the economic significance of "Wildlife Watching Tourism." Coupled with income generated for protected areas through entrance fees, a typical wildlife watching tour costs an average US$ 433 and gains an additional US$ 55 in out-of-pocket expenses per person each day. Furthermore, these tours provide job opportunities for the local population who are hired as tour guides, staff, and cultural performers, among others.

Yet, tourism authorities and tour operators are only involved to a minor extent in anti-poaching efforts and there is room for improvement in this area. A valuable contribution would be the systematic integration and evaluation of available data, and capacity building for a more consistent monitoring of protected areas' visitors and receipts.

Given its economic importance, the tourism sector can and should play a key role in raising awareness among both policy-makers and tourists on the devastating impacts of wildlife crime, as well as in helping to finance anti-poaching initiatives.

Looking Ahead – African Tourism in 2030

Looking ahead, UNWTO forecasts that African tourism will continue to expand. International tourist arrivals in Africa will more than double its present numbers by 2030 to reach an estimated 134 million. Such growth presents an immense opportunity to promote socio-economic development but also an increased responsibility to protect the region's precious natural resources, biodiversity, and host communities.

UNWTO is committed to advance sustainable tourism development in Africa by mobilizing the global tourism community on the critical issues such as wildlife crime. Protecting Africa's heritage is protecting Africa's future. ✳

Taleb Rifai,
Secretary-General,
United Nations World Tourism
Organization (UNWTO)
http://africa.unwto.org

When the Buying Stops,

The numbers tell a gruesome and tragic tale. In South Africa since 2007, when only 13 rhinos were killed by poachers, the number of these majestic beasts butchered by man has increased year after year. During 2014, a total of 1,215 were exterminated, and if the annihilation continues at the 18% increase witnessed thus far in 2015, rhino deaths will exceed births. Sadly, this volume of carnage pales in comparison to the estimated 100,000 African elephants massacred in just three years.

All that for horns erroneously believed in Asia to have mythical medicinal and aphrodisiac properties, and tusks used for trinkets, jewelry, and carvings. The hunger for other animal parts is no less ravenous, including for the organs, pelts, and bones of tigers, lions, and leopards.

All that despite a 40-year-old UN Convention on International Trade in Endangered Species (CITES) signed by 181 countries and underpinning international campaigns to empower local African communities as wildlife champions and to educate consumers about how some traditions don't stack up to modern realities.

All that in the face of a blood-soaked, demand-driven surge in slaughter that is pushing – or, as in the case of the northern white rhino, has already pushed – many of Africa's iconic wildlife to the brink of extinction.

Think of it as a clash between honey and money. On the one hand, sweet-natured animals and their out-manned and out-gunned conservation-minded protectors plead for reason, responsibility, and restraint. On the other hand, desperately poor villagers work for heavily armed crime syndicates deaf to anything but an unyielding black market paying up to US$ 1,500 a pound for ivory and an unbelievable US$ 30,000 a pound for rhino horn. In fact, Global Financial Integrity estimates that the worldwide illegal trade in animal parts sees US$ 7.8–10 billion in annual profits, fifth in value behind criminal traffic in drugs, humans, oil, and counterfeits.

So is there hope for Africa's beleaguered wildlife? Hope does spring eternal, regardless of major setbacks, especially rising demand in resurgent Asian economies like China and Vietnam. Of course, the alternative is unfathomable: poachers made wealthy through animal extinctions. The decimation of elephant and rhino populations has implications greater than most people realize – greater than anyone may fully understand – as these megaherbivores play key roles in establishing ecological equilibrium, creating conditions upon which hundreds of other species rely.

Fortunately, there's a rising tide of efforts to curb poaching, many linked with a tourism-guided awareness that viewing and photographing wildlife in Africa brings in much more revenue than poaching and trophy hunting.

- Community-engagement programs, some now championed by government, are linking conservation and wildlife vitality to human welfare, education, and employment, and putting villagers themselves on the alert for illegal activity.

the Killing Can Too

- Governments and NGOs are actively exploring solutions to the poaching problem, especially for rhinos, often by translocating animals to safe havens and deploying military to protect them. President Obama is also soon to propose a federal rule prohibiting the sale across U.S. state lines of ivory from African elephants and further restricting commercial exports.
- Major public awareness campaigns aim to stop the demand for illegal wildlife products in places where the demand is highest.
- Enormous stockpiles of recovered illegal ivory are being crushed to eliminate availability completely, rather than selling it off and stimulating demand.
- New research is demonstrating that, counter to arguments by those who defend it, trophy hunting does not drive conservation or revenue generation as much as appreciating live animals does. Several major airlines – mostly recently Emirates – have even banned the transportation of animal hunting trophies, and Australia has forbidden the importation of trophy kills.
- Media and industry are taking stronger stances against the exploitative misrepresentation of wildlife experiences by revealing how desperate the situation is, though plenty more could be done. For example, the Crime Museum in Washington, DC, has just opened a new exhibit about the horrors of the illegal wildlife trafficking industry.

Bottom line: Underlying all poaching is a skyrocketing demand in Asia for ivory, horns, hides, and other products. By eliminating this demand, and the services supporting it, we can destroy what drives poaching. Remember – and remind everyone wherever you go: when the buying stops, the killing can too. ❋

Ethan Gelber,
Founder/Editor,
The Travel Word
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Creative Partnerships for
From "Looking Good" to

There is a widespread perception that tourism opens up new areas, destroys destinations, and moves on to the next pristine destination. This is a typical example of what I call "hit and run" tourism. This perception emerges from exploitative relations and unequal partnerships between tourism investors and host destinations. Ultimately, this kind of tourism destroys places. Yet this kind of tourism can have corporate responsibility programs that make them look good (e.g. clean a beach once a year, paint a classroom in a local school or sponsor a sports event). These activities are not bad, except that they are not transformative. They create dependency, have no long-term impact, and are focused on making the business look good.

In Kenya, tourism partnerships are achieving the opposite by being good. They are transforming conservation by creating/securing new spaces for wildlife through partnerships with host communities. These are not partnerships of convenience. They are partnerships for sustainable development, and in some cases they are partnerships that guarantee the survival of species, cultures, and livelihoods for host communities. They are doing this by creating

Community Conserved Areas (CCAs) or conservancies, as they are commonly known.

Conservancies are large tracts of community-owned land, ranging in size from 10,000 to 100,000 acres, voluntarily set aside by a community for conservation after entering into partnerships with tourism ventures. To ensure they are socially, ecologically, and economically viable, they develop democratic governance systems to ensure tourism is regulated, environment is protected, negative impacts on environment are reduced, opportunities for sustainable community development are enhanced, and benefits are equitably shared. It is the transparent nature of the partnerships that has built trust and encouraged many more communities to form conservancy partnerships. It is estimated that 12 million acres of land have achieved protected area status in Kenya, through creative partnerships between tourism investors and communities.

The impact is not only in increased size of land under conservation. These conservancies have impacted several other aspects of local people's lives. Since every conservancy employs wildlife scouts/rangers, the security of people and

Conservation in Kenya: "Doing Good"

wildlife has been enhanced around conservancies. In terms of ecological impacts, most conservancies have registered significant reductions in poaching if not eradicating poaching altogether and have seen regeneration of habitat and even the return of species. In Eselenkei Conservancy in Amboseli, elephants returned five years after the establishment of the conservancy, having previously deserted the area for more than 15 years.

Economic empowerment of communities is real. Every household with land inside a conservancy is guaranteed a regular income from tourism. A land rent is paid regularly to every community member who contributes land towards the conservancy. This means households can plan for healthcare, education, and investments. For most households, it would have taken much longer to attain this status were it not for the conservation partnerships with tourism investors. Tourism partners in Naboisho Conservancy in Maasai Mara pay the community US$ 50,000 every month for setting their land aside for conservation. In addition to land rent, several community members are employed in tourism camps in conservancies. There is now more money in circulation within the community, fueling a market economy.

These partnerships have been packaged into a rich tourism experience for visitors. They can see wildlife, interact with host communities/custodians of land, and engage with interventions that define the partnership. This is green luxury and it attracts premium rates. Leading safari destinations in Kenya like Maasai Mara, Laikipia, and Amboseli host a growing number of conservancies and green luxury camps and lodges.

By increasing the size of land under conservation instead of destroying destinations, these private/public partnerships are not only creating good places for tourists to visit, but also creating good places for local communities to live, through sustainable development. These partnerships can be described as transformative. ✳

Judy Kepher-Gona,
Founder & Director,
Sustainable Travel & Tourism Agenda
www.sttakenya.org

AFRICA'S WILDLIFE

Africa is renowned for its spectacular wildlife, megaherbivores, the five big cats, diverse birds, and other species. But most people have seen these only on their televisions – visiting Africa remains a dream for so many. People from all over the world save up for years and travel to Africa on an ultimate adventure to witness the planet's most stunning wildlife: the wildebeest migration, lions making a kill, the world's tallest mammal, the heaviest land animal, the fastest predators. Indeed, Africa – as the world's nature tourism superpower and principal wildlife tourism region – continues to be a major draw of visitors and an important source of revenue for many African countries.

Africa is also developing at a breakneck speed, to meet its Millennium Development Goal of ending poverty and becoming industrialized, although this threatens the very wild spaces and species that visitors are coming to see. Wildlife is being sold and poached, while landscapes are being damaged and fragmented by cities, roads, and bridges. Unless we can transform our approach and make sure that our unique wildlife is maintained as a sacred part of our land and our culture, we might see a future of high-speed trains and skyscrapers, but at the cost of a land largely devoid of wildlife.

There are two major threats: first, the international demand for wildlife products which is driven by external pressure, and second, the loss of habitat which is driven mainly by internal pressure.

International demand for wildlife products is growing at an alarming rate largely because the world is shrinking, more people are traveling, and access to these products is easier than ever before. While many organizations target the commercial traffickers, we feel that tourists are also an essential part of the solution. More than seven million visitors enter Africa via Nairobi International Airport, most of whom are in transit. Unfortunately, some of these visitors threaten the future of the very wildlife that they have come to enjoy by buying wildlife products on the stalls of streets in small towns and large cities in Africa. It is now estimated that at the current rate of poaching, elephants and rhinos will disappear from the wild within our lifetimes.

The escalating demand for ivory and rhino horn in China, Thailand, the Philippines, and Vietnam is driving the problem. But it is not just industrial poaching and criminal cartels who are the problem. Ignorant travelers purchase lion claws, porcupine quills, and ivory trinkets from market stalls, falsely believing that they come from animals that have voluntarily dropped their claws, quills or tusks, and that they are helping the local communities by buying the ivory and other wildlife products. Nothing could be further from the truth.

We need to transform our tourism product into an experience that visitors can be proud of, by enlisting them in conservation, encouraging them not to buy wildlife products, and giving them an opportunity to participate in more than sightseeing, to contribute to science, cultural exchanges, and to support good initiatives. In Kenya we have initiated citizen science projects, for example in two days tourists helped to take ten thousand photographs of zebras in Nairobi National Park. This helped to reveal the population of the species by using innovative software called IBEIS which, similar to bar coding, reads the unique stripes of the zebra. Now tourists can enjoy the landscapes and wildlife, learn about them, and participate in generating meaningful data for management.

Africa's ambitious construction projects are another challenge for our wild places which are being lost, fragmented, and damaged. It's not just Kenya – the spectacular wildebeest migration, listed as one of the wonders of the world, is at risk as Tanzania dreams of building a highway across the iconic park to support development of communities on the edge of Lake Victoria. Can development

AT A CROSSROADS

for the people be achieved without threatening the very attraction that brings millions of people to Africa? We believe it can and we have proof.

Kenya, under the leadership of the First Lady, Her Excellency Margaret Kenyatta, is leading Africa in driving a movement that is mobilizing public support for conservation through the "Hands Off Our Elephants Campaign." Not only are the public better informed and enabled to help stop the slaughter, but people can now participate actively in conservation. This means that private landowners and communities are encouraged to put their land into conservation, and public meetings are convened to enable public participation in brainstorming and decision-making. Thanks to the openness of such discussions, wildlife law enforcement is better than before, and poaching is extremely low.

But it is the exciting innovations in construction that will soon raise eyebrows and champagne glasses. Rather than fighting conservationists over impacts on wild spaces, developers are beginning to construct elevated railways and highways to cross parks without threatening animals and their habitats. The new Standard Gauge Railway that Kenya is building will pass over Nairobi Park to the delight of passengers who will be able see the vast park and its impressive wildlife below. It will cost a lot to build, but it will be worth it. The same can be done in Tanzania for the Serengeti Highway to save our wildebeest spectacle, while also meeting the development aspirations of millions of people.

Leadership in conservation has been a concern for many for too long. Apart from Wangari Maathai, few Africans are recognized as true champions of wildlife in Africa. Most of the conservation approaches are imported from the West and have alienated the people of Africa. Even this is changing. Central to the future of Africa's wildlife is ownership, which is achieved through the involvement of the people in decision-making. Baraza, or traditional meetings, are the way Africans reach consensus on controversial issues. Everyone sits in a circle, each person has a say, and everyone respects each other's views. A decision is made after all views have been presented. This approach has been recently revived, using participatory planning platforms like Open Space Technology to help bring people together, to share ideas and recommendations on urgent matters like conservation.

WildlifeDirect with other partners hosted such an event in Nairobi in July 2015, bringing together people from all sectors of society to discuss the role of young people in conservation. Dubbed ''Creating a Generation of Wildlife Warriors," the event attracted diplomats, rangers, tourists, artists, community members, university students and children from different counties to discuss their conservation priorities and to give recommendations. The outcome is a plan of action created for the benefit of future generations.

Why does participation matter? Because Africa is not engaging adequately in global decisions that affect, and indeed threaten, our wildlife. In September 2016, world leaders will meet at the next CITES conference to make decisions on trade in endangered species. Previous decisions have had catastrophic outcomes. Africa is losing her wildlife, which threatens her economy, security, and future aspirations. African leaders need to defend the continent's identity, to take a united stand against losing elephants, rhinos, lions, and other species to people who wish to wear their teeth and claws as jewelry. It's not just about money; Africa's wildlife is as sacred as any monument. The future of Africa's wildlife will require a united stand by our leaders to protect our unique wildlife heritage, our pride, and our identity. Every African citizen has a role and a duty to demand this of their leaders. Saving Africa's wildlife is not just a selfish desire of those of us in Africa; for the heritage we protect is a global heritage and must be recognized as such. ✳

Paula Kahumbu,
Executive Director,
WildlifeDirect International
www.wildlifedirect.org

Creating Dynamic Family

There is no doubt that Africa is a desirable destination for travelers. Envisioning bright red sunsets over the African savannah, massive wildlife migrations, and visits with unique cultures, travelers book African safaris each year.

While the "bread and butter" of the African safari industry has traditionally been an older demographic, increasingly families and younger travelers are also booking trips to Africa.

Here are a few ways through which we can maintain this momentum and encourage more families to travel to Africa by creating and promoting dynamic, family-oriented travel products.

Encourage Development of Low-Volume Safari Products at a Mid-Range Price Point

Because family and multi-generational groups are larger, budgets can be an important influence on the travel planning process.

While the market for low-volume, high-priced safari products is thriving, there is a notable paucity of low-volume, mid-priced experiences. Offering intimate, meaningful adventures for families at a more modest price point is one way to encourage more and larger family groups to travel to Africa.

Support Easier-Access New Destinations across Africa

One of the biggest challenges for travel packagers keen to include "off-the-beaten path" or non-traditional itinerary stops is poor accessibility. However, if governments can incentivize the addition of scheduled flights or direct bound transfers, operators could begin adding new destinations to itineraries across Africa.

Travel Products in Africa

This also reduces the burden on over-trafficked destinations and supports the growing trend of families looking for a special unique experience.

The African travel industry needs to incentivize tour packagers to include these non-traditional or emerging destinations by offering better access to them.

Harness Digital Marketing to Share Family Travel Stories in Africa

Family travelers are heavily influenced by word of mouth, perhaps more so than any other segment of the travel market. By mobilizing the African travel industry to encourage and enable family travelers to share their stories of travel in Africa, the entire industry will benefit.

Educating the travel industry about social media and digital marketing is a great way to start.

The private tourism sector across Africa could be interacting with travelers via social media, encouraging them to share their stories and implementing strategic media, blogger, and content creator campaigns that target family travelers.

The #WhyILoveKenya campaign is a great example of a unified strategy to support Kenya during a time of crisis. Digital marketing also requires much less capital investment than traditional marketing and can be implemented by both small and large companies. ❧

Sarah Fazendin,
Director of Memberships,
Family Travel Association
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FAMILY TRAVEL ASSOCIATION
Changing Lives Through Travel

Hotel Chain Development Pipelines in Africa, 2015

In the 7th edition of our annual survey of the international hotel chain development intentions and activities in Africa, we have a total of 33 hotel chain contributors this year, almost double the 19 chains that contributed when we first produced the survey in 2009. New hotel chains this year include Mandarin, CityBlue, Frasers and Banyan Tree, bringing the number of brands reporting data to 80.

The 33 contributing chains reported a total of 270 hotels and almost 50,000 rooms in their combined pipeline.

The pipeline for sub-Saharan Africa (SSA) continues to grow much faster than the North African region. The SSA region, of course has far more markets than North Africa, 49 countries vs five.[1] Many of the SSA markets have historically been underserved with branded hotels and are now playing catch-up – Mauritania, for example, with no existing branded supply, now has three branded hotels in the development pipeline.

CHART 1. 2015 HOTEL CHAIN DEVELOPMENT IN AFRICA REGIONAL SUMMARY
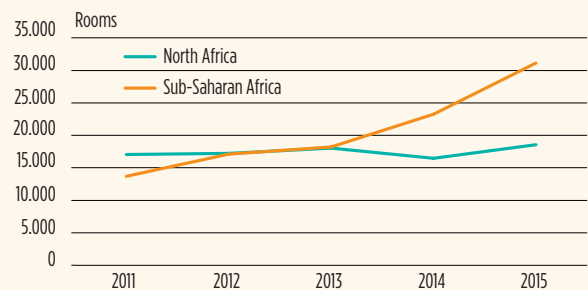
1 For the purposes of the survey, North Africa comprises Morocco, Algeria, Tunisia, Libya, and Egypt.

TABLE 1: 2015 Hotel Chain Development Pipelines in Africa – Regional Summary										
	2011		2012		2013		2014		2015	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	75	17,038	77	17,217	73	18,065	73	16,449	79	18,565
Sub-Saharan Africa	76	13,700	100	17,109	115	18,191	142	23,283	191	31,150
TOTAL	**151**	**30,738**	**177**	**34,326**	**188**	**36,256**	**215**	**39,732**	**270**	**49,715**

Growth in the pipeline in North Africa has slowed considerably, impacted by unrest and political conflict in the region. Egypt, which has traditionally been a major growth market, lost some pipeline projects due to delays and the canceling of some deals in 2014. Libya, a country which many groups were focusing on just two years ago, has seen no new activity in terms of hotel development deals, for obvious reasons.

Chart 2 shows the sub-regional breakdown of hotel rooms in the pipeline in sub-Saharan Africa:

CHART 2. 2015 HOTEL CHAIN DEVELOPMENT IN SUB-SAHARAN AFRICA – SUB-REGIONAL BREAKDOWN (ROOMS)
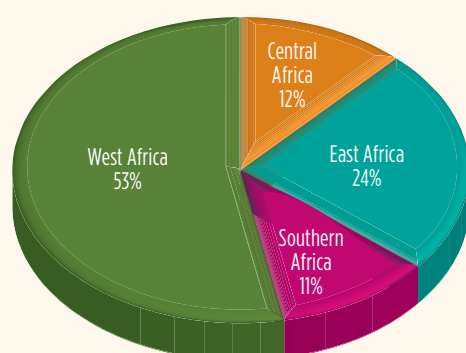
As a sub-region, West Africa has by far the largest number of rooms in the pipeline, more than double that of East Africa. Not only does West Africa have deals in the largest number of countries (13), but it also has Nigeria, which was officially recognized as the largest economy on the continent in 2014, after it rebased its GDP figures. Nigeria also boasts the largest population and the largest number of urban conurbations in one country, with the exception of South Africa.

Moving from the regional analysis to individual countries, Nigeria has by far the most rooms in the chains' development pipelines – over 8,500 rooms in 51 planned new hotels. That is more than the entire pipeline in Central Africa and East Africa combined. Table 2 shows the top ten countries by number of rooms:

TABLE 2: 2015 Hotel Chain Development Pipelines in Africa – Top 10 Countries by Number of Rooms

Ranking	Country	Hotels	Rooms	Average Size
1	Nigeria	51	8,563	168
2	Egypt	18	6,440	358
3	Morocco	31	5,474	177
4	Algeria	13	2,749	211
5	Tunisia	12	2,444	204
6	South Africa	13	1,662	128
7	Kenya	8	1,510	189
8	Libya	5	1,458	292
9	Ghana	8	1,399	175
10	Uganda	9	1,397	155

Nigeria, Egypt, and Morocco have occupied the top three slots since 2011. It is noticeable that whilst Nigeria has 33% more rooms than second-placed Egypt, the average size of each planned hotel in the former is less than half that in the latter. New hotel deals in North Africa generally, and particularly in Egypt, are of a much larger size.

Having looked at where it is happening, or due to happen, we now look at who is making the running. The top 10 brands by number of hotels and rooms in their pipelines are shown in Table 3.

TABLE 3: 2015 Hotel Chain Development Pipelines in Africa – Top 10 Brands by Number of Planned Hotels and Rooms

Rank by Hotels				Rank by Rooms				Average Size – Rooms
Rank	Brand	Hotels		Rank	Brand	Rooms	Change on 2014	
1	Radisson Blu	22		1	Radisson Blu	5,372	23.9%	244
2	Hilton	16		2	Hilton	4,965	5.1%	310
3	Marriott	11		3	Marriott	2,316	9.5%	211
4	Park Inn by Radisson	10		4	Sheraton	1,862	29.6%	233
5	Hilton Garden Inn	9		5	Hilton Garden Inn	1,682	33.1%	187
5=	Noom	9		6	Kempinski	1,618	3.3%	324
7	Sheraton	8		7	Park Inn by Radisson	1,581	-17.3%	158
8	Four Points by Sheraton	7		8	Noom	1,332	12.9%	148
8=	Golden Tulip	7		9	Four Points by Sheraton	1,250	37.5%	179
8=	Mantis	7		10	Courtyard by Marriott	1,154	0.0%	289

TABLE 4: 2015 Hotel Chain Development Pipelines in Africa – Top 10 Brands by Pipeline Status

Rank	Brands	Hotels	Rooms			Rank – All Deals
			Total	Onsite Construction		
1	Radisson Blu	22	5,372	4,061	75.6%	1 ⟷
2	Hilton	16	4,965	3,305	66.6%	2 ⟷
3	Sheraton	8	1,862	1,219	65.5%	4 ↑
4	Marriott	11	2,316	1,210	52.2%	3 ↓
5	Park Inn by Radisson	10	1,581	1,189	75.2%	7 ↑
6	Hilton Garden Inn	9	1,682	1,108	65.9%	5 ↓
7	Mövenpick	4	1,001	1,001	100.0%	- ↑
8	Kempinski	5	1,618	968	59.8%	6 ↓
9	Noom	8	1,332	846	63.5%	8 ↓
10	Pullman	3	844	844	100.0%	- ↑

Carlson Rezidor's Radisson Blu brand continues to occupy first position in terms of the number of hotels and rooms in its development pipeline. Its sister brand, Park Inn by Radisson, is also in the top 10, whilst the Hilton brand and its "little brother," Hilton Garden Inn, occupy second and fifth positions respectively. Marriott and Starwood each have two brands in the top 10, with Starwood achieving particularly strong growth for both brands, Sheraton and Four Points. Kempinski has been signing the biggest deals, with an average 324 rooms per hotel, double that of Park Inn, and of all the chains in the survey it has the largest hotel project in sub-Saharan Africa, the 451-room Grand Hotel Oyala Kempinski in Equatorial Guinea's future new capital, Oyala.

Sorting the deals to analyze whether or not they are on site changes the brands' rankings slightly.

The Radisson Blu and Hilton brands remain in the top two positions – both have long-established development offices on the continent and have been actively signing deals with investors considered capable of making it happen. Marriott drops one place in the rankings, relinquishing its third position to Sheraton.

Mövenpick's four hotel deals (all located in North Africa – Egypt, Morocco, and Tunisia) are under construction and scheduled to open in 2016 and 2017. Pullman's signed deals, in Nairobi, Kinshasa, and Addis Ababa, are also all on site, and are scheduled to open fully by 2017 (the Grand Hotel in Kinshasa opened partially earlier this year).

For the first time in this year's survey, we have analyzed the deal-signing activity by intended opening year, as shown in Table 5:

TABLE 5: 2015 Hotel Chain Development Pipelines in Africa – Anticipated Opening Years of Pipeline Deals

Year	Hotels	Rooms	Cumulative New Rooms Open
2015	75	10,599	-
2016	80	14,073	24,672
2017	55	10,988	35,660
2018	39	8,671	44,331
2019	11	2,685	47,016
2020	4	1,157	48,173
Not Known	6	1,542	49,715

That's over 35,000 new rooms in 210 new hotels opening in the next three years, with a certainty that there will be more in deals yet to be done.

Africa is really proving to be the growth story of the 21st century! ✳

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Kenya Tourism Accommodation Landscape

The Kenyan hotel industry posted a mixed performance in 2013. The category saw slow growth, mainly due to the increasing threat of terrorist attacks in Nairobi. Following the Westgate Shopping Mall attack, travel advisories from leading Western countries (the UK and the US) hit the industry very hard. Local Kenyans, however, seemed to take advantage of the situation as they were responsible for 60% occupancy in December in the popular coastal towns of Mombasa, Malindi, and Lamu.

The prices of local chains and international chains are slightly different, but 2013 witnessed an increase in bookings for local chains from inbound visitors due to increased awareness thanks to the Kenya Wildlife Service (KWS) website, Kenya Tourism Board, and Travelstart, a recently opened online agency in Kenya. However, most visitors continued to flock to foreign-operated chains such as Sarova, InterContinental, and Serena. Local hotels suffer from a lack of advertising and marketing as well as a need for improved service compared to international chains.

Kenya is expected to see the widespread entry of new hotel chains. In 2013, the American chain Best Western (Premier) opened the Hurlingham Hotel in a Nairobi suburb. Other well-known global chains are also emerging in Kenya, including Radisson, Kempinski, and the prestigious Taj Hotels, to name a few. Their entry is critical as the Kenyan hotel industry is projected to need 10,000-15,000 more beds. Kenya's political elite is being flexible in giving licenses to both Eastern and Western businesses to open outlets in the country. Even though travel advisories have affected coastal hotels, demand in Nairobi remains high among both leisure and business tourists.

In 2013, private accommodation was the best performer, registering current value growth of 9%, driven by strong demand from both business and leisure tourists seeking accommodation away from what they perceive to be the masses. The perception of the masses has led to many tourists forgoing Kenya and instead opting for the less congested Zanzibar, Seychelles, and Mauritius, hence the weak growth for hotels (4%). Guesthouses, with current value growth of 8%, recorded the second strongest performance, as these provide both mass accommodation and some private accommodation. For example, the YWCA and YMCA have guesthouses with private wings that are very popular with both business and leisure tourists in Kenya.

Campsites, with a current value growth of 8%, ranked third in terms of performance due to their perceived safety compared to chained hotels in the city. Most campsites are located away from coastal towns and have the double security of Kenya Wildlife Service (KWS) guards and private guards hired by campsite operators. Boutique hotels are also gaining ground due to offering a very high level of service and a more personal touch.

Serena Hotels led the hotels category in 2013 with a 10% value share, largely due to a widespread presence in the region and the fact that most of its hotels are not located in areas most affected by the threat of terrorism. Being relatively expensive, the company's hotels are frequented by business people and inbound tourists thanks to offering a high level of service and enjoying a good reputation throughout East Africa.

Alliance Hotels, which is locally owned, posted the weakest growth at the beginning of the year, due to political instability during the electioneering period. As the hotel chain is linked to local politicians, it was heavily affected by travel advisories, especially from Western countries. A large majority of the company's hotels are located on the south coast of Kenya, which has been heavily affected by the slump in tourism, leading to the closure of 20 hotels, including three from the Alliance chain.

U.S.–AFRICA TRAVEL AND TOURISM

When looking at the U.S. outbound air traffic, the demand for U.S. citizen travel to international destinations is strongest in North America, with Mexico representing 37% and Canada 17% of international travels. Following North America, the second most traveled region for U.S. citizens is Europe at 17%, then the Caribbean at 10%. Africa's share of U.S. citizen travel is minimal at only 0.5%, but has vast potential for growth. ✳

U.S. Citizen Travel to International Regions, 2014			
Regions	**Total YTD**	**% Change YTD**	**Market Share**
Europe	11,892,216	4.2%	17.4%
Caribbean	7,171,872	9.6%	10.5%
Asia	4,508,517	4.2%	6.6%
South America	1,771,505	2.1%	2.6%
Central America	2,697,107	8.1%	3.9%
Oceania	601,325	5.2%	0.9%
Middle East	1,779,683	12.7%	2.6%
Africa	357,923	1.7%	0.5%
Total Overseas	**30,780,148**	**6.1%**	**45.1%**
Mexico	25,409,725	21.9%	37.2%
Canada	12,113,485	0.9%	17.7%
North America	**37,523,210**	**14.2%**	**54.9%**
Grand Total	**68,303,358**	**10.4%**	**100.0%**

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office (NTTO).

Making Rank: An

Each year numerous print and digital publications around the world publish some version of an annual "Destination to Visit" listing. The travel editors of these publications play a vital role in both educating the public about destinations and promoting travel to countries that make their lists. The *New York Times* and *Travel & Leisure* magazine have the largest destination listings with over 50 selections. Others, such as the magazine *AFAR*; the online aggregator *Huffington Post*, the digital media site Mashable, or online travel agencies such as Trip Advisor also have their own destination lists. Regardless of the publication's popularity or distribution reach, each one can influence the travel planning and booking decisions of the consumer.

Countries that are featured on travel lists can bank on amplified awareness of their destinations, potentially leading to increased tourist arrivals and dollars flowing into their economies. Therefore, it is especially important for lesser known or emerging destinations to secure a spot on these travel lists, so they may enter into the consciousness of travelers.

To many Westerners, Africa is an unknown destination. Some even refer to it as a country, rather than a continent. This lack of knowledge is perpetuated by the infrequent selection of African destinations in Western publications' annual "Must See" travel listings. After surveying more than a dozen publications, it is clear that out of all the geographic regions, African destinations are the least mentioned.

Even though the pool of African countries featured in top travel lists is small, there is a trend. Like Africa's game animals, the Big Five African countries that are the most frequently listed for 2015 include South Africa, Morocco,
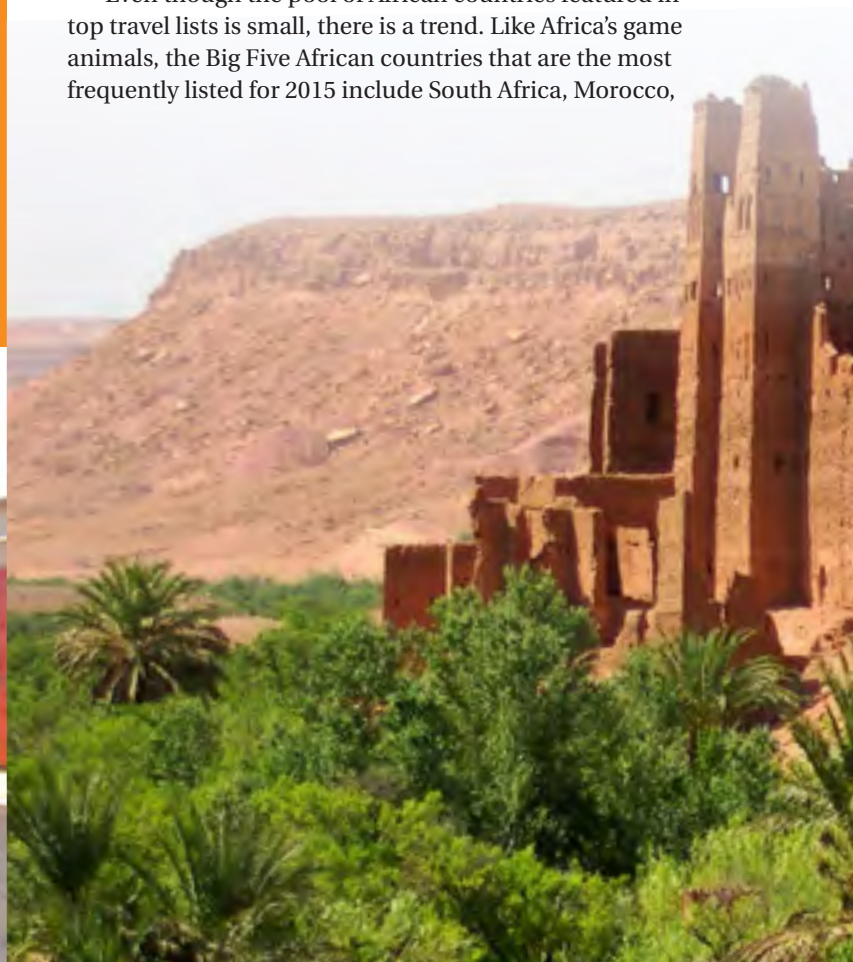
Analysis of the Top Ten Travel Lists

Tanzania, Namibia, and Tunisia. In the combined 15+ publications' travel listings reviewed, Egypt, Mozambique, Rwanda, and Zimbabwe are each selected more than once. Honorable mentions go to Burkina Faso, Botswana, Kenya, Madagascar, and the Republic of Congo, which are destinations that are not traditionally selected on travel lists. Specific African destinations such as Lake Malawi, Hurghada in Egypt, Okavango Delta in Botswana, the Bazaruto Archipelago in Mozambique, and the Selena Game Reserve in Tanzania are among the few listed.

Another trend to highlight is how African countries are presented on these travel listings. South Africa and its city destinations, including Cape Town, Johannesburg, and Durban, are the most frequently listed African destinations in 2015. Along with Morocco, and its city destinations of Fez, Marrakesh, and Rabat, these two nations host the most frequently featured individual destinations in Africa. The majority of the remaining African countries are rarely represented by individual city or regional destinations; instead they are usually featured as a country. Why does this distinction matter? Awareness!

Countries that have cities, regions, or tourism assets featured on travel lists have a higher chance of increased overnight visitor stay and/or repeat visitation, which both result in higher tourism spend. To the general public, Egypt is well associated with its pyramids, Nile River, or Abu Simbel. However, to less globally aware individuals, Ethiopia is not instantly associated with its Lalibela churches or Axum. Nor is Djibouti associated with world class diving. Similarly, Senegal is not associated with its music or culinary scene.

One way to propel African metropolises, sweeping landscapes, cultural experiences, and adventure activities into the forefront of travel consumers' eyes is through education, advocacy, and lobbying of African destinations to be featured more often and more diversely on annual travel lists. African country or city DMOs can rally their destinations into these travel lists by inviting travel editors/bloggers on familiarization trips, implementing a country tourism ambassador program, partnering with airlines and hotels to collaborate on joint PR programs, engaging with consumers on multiple social media platforms, investing in interactive websites highlighting their tourism offerings, or attracting an "Eat, Pray, Love" effect by increasing incentives to movies/television productions to showcase the country's cityscape or landscape to viewers.

The more DMOs and destination marketers of African countries can do to bring awareness of individual African destinations and combat the misconception of Africa being a single country rather than a continent of 54 diverse nations, the better informed the public will be. Africa is more than Egypt, Morocco, and South Africa. Africa is more than wildlife safaris. Africa is more than a continent afflicted by warring factions or isolated health crisis. Africa is MORE, much more, and is awaiting an increased number of visitors to enjoy its many offerings. ✺

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IMPACT OF TRAVEL WARNINGS

The U.S. State Department issued more travel warnings for African nations than any other continent in the past 18 years, according to Skift's recent investigation into U.S. travel warnings since 1996.

Of the 80 countries for which travel warnings were issued, 30 were located in Africa. Of the top 5 countries mentioned in the most warnings, four were located in the continent including Algeria (13), Congo (10), Burundi (12), and Chad (9).

Although travel warnings don't necessarily mean U.S. citizens cannot visit a destination, they do signify long-term circumstances, which

are not ideal for vacations or even business travel.

"A Travel Warning is issued when the State Department views the threat to U.S. citizens in a specific country to be chronic and long-term," says a spokesperson for the State Department's Bureau of Consular Affairs.

Travel warnings are only issued once and then remain valid indefinitely until they are officially cancelled or revised. The majority of these publications then are updates, so we only counted updates that were separated by at least one month. Their indefinite status, however, can have long-term effects on a nation.

Kenya's coastal tourism, for example, declined after violence sparked a U.S. travel warning in 2014 that actually prohibited government employees from visiting the shore. Country officials argue the warnings have a ripple effect, as unemployment caused by the decrease in tourism actually breeds more violence.

Although travel warnings themselves are often checked before booking a trip, the event that sparked them and the news cycle that follows often has even more influence over public opinion of a destination.

For example, the State Department issued a travel warning for Tunisia on

IN AFRICA

March 18, 2015, shortly after gunmen attacked the national museum, killing 19 people. The warning recommended U.S. citizens to "maintain a high level of vigilance," but also noted "the Tunisian government has shown its commitment to address security concerns." The general public, however, was more likely to see the news on TV or the Internet than the travel warning itself.

Public perception of a destination can be as influential as travel warnings in impacting travel decisions. The global Ebola scare is an example of when news and opinion overshadowed the impact of travel warnings.

The majority of African nations were not impacted by the Ebola outbreak; however, travelers still abandoned plans to visit sub-Saharan Africa, including nations located thousands of miles from the nearest outbreak.

In this case, travel warnings actually became beneficial to safe nations that could point to them as proof that visitors could, and should, keep their plans.

Despite the many concerns around the impact of travel warnings, a survey administered by the UK travel agent sunshine.co.uk found that nine in ten travelers did not know which countries the Foreign Office had warned against traveling to. Other travelers actively seek out destinations that are known to be dangerous with few visitors.

Travel warnings can be viewed as the official stamp of safety on a nation, but nations can still do as much as possible to build a positive public perception to attract visitors before, and if, a disaster does occur. ✳

Samantha Shankman,
Reporter,
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Telling Africa's Story: Managing

The African continent has always stood tall as one of the world's great regions for travel. With its unique, unfiltered fusion of breathtaking, life-inspiring offerings – history & heritage, culture & tradition, wildlife, environment, and most importantly the innate spirit of the continent's people – Africa never fails to create an imprint on the minds and hearts of travelers from across the globe. Those wishing to travel to Africa have the continent positioned high on the list of dreams to be fulfilled. Those who visit find that the stories they take home become far more precious than their souvenirs. And that one trip is simply not enough. The calling has been heard.

As a result, the tourism sector continues on a steady growth path, with the UNWTO estimating 65.3 million tourist arrivals in Africa in 2014. All told, the WTTC estimates the sector has brought to the continent an invaluable 8.1% of GDP, and importantly, provided jobs for over 20 million people, representing 7.1% of the continent's total employment.

As much as travelers to Africa become the greatest ambassadors of the continent with the remarkable tales of their travels, it is not, and should not be, solely their responsibility to act as the narrators of Africa's great story. Vital to the future of tourism in Africa is the continent's ability

to tell its own story, as one and as many. With so much to share with the world, it is the responsibility of Africa's tourism community to stand tall and make the continent's voice heard, collectively and country by country, providing the information, insight and invitation needed to inspire travelers to make the journey, begin their exploration, and return to discover more.

Why is this a "must" and not a "maybe" within the profiles, priorities, and plans of Africa's tourism leaders? There are 54 powerful reasons why proactive image building and information sharing about Africa is essential: namely Africa's 54 nations, many of whom depend on tourism for economic, social, environmental, and spiritual wellbeing, now and in the future.

Telling the stories of Africa, across the continent and about the continent, is not only a critical lever for building

Media Perceptions

and sustaining tourism interest and therefore tourism economy activity, it is also a vital tool for insulating the destination from shocks, both external and internal.

This truism was brought to life, painfully in 2014 and into 2015, as the continent suffered one of our generation's most terrifying pandemics: Ebola. While geographically restricted to one sub-region of the continent, forcing the courageous people of predominantly West Africa to work through tragic times, the continent as a whole suffered declines in tourism. Because of global gaps in understanding around the geography of Africa, stories from West Africa took on shadows that stretched right to the south of the continent.

But who is most often charged with storytelling and creating an impact on tourist perceptions? The media. Yet the fact remains that knowledge of the continent, tourism stories from the continent, and managing messages on the continent, are primarily the responsibility of the tourism sector. The media is a magnifier of these messages, committed to telling the stories of the continent, and therefore needing to ensure that the information in hand is truthful, insightful, meaningful, and readily available. When information is lacking, silence carries lingering sentiments – positive, but also negative.

For this reason, working proactively to build genuine, meaningful relationships with the media is one of the greatest investments a destination can make, and one of the most gratifying. Not to mention, one of the most natural.

Tourism is an industry that has partnerships at its foundations. The media is, and has always been, one of the most powerful, influential and interested stakeholders within the tourism community, open to working with destinations before, during, and after the stories. This dynamic of proactive, thoughtful cooperation is proving, time and again, to be one of the strongest assets that countries, and continents, can build as part of their tourism leadership efforts.

Destination image building and perception management is a conversation, an ongoing conversation with global audiences, made possible through the establishment of trusted media relationships. There is no dividing line between "us" and "them".

Tourism leaders, travelers, the media – we are all one, excited about and committed to showcasing the world we all share, for the betterment of people across the world today, and tomorrow. ✳

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CACHET CONSULTING
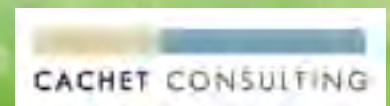
Shifting the Narrative on Africa:

Is the world becoming a more treacherous place to live and travel? Are geo-political issues and health crises increasingly worrisome to the point whereby citizens and travelers should change the way they make destination decisions or manage their lives? Likely not. While it's true there are trending conflicts and increasing worldwide health and security concerns, such activity need not impede travel or cause fitful lives.

It's always smart to be informed. But in today's environment, especially for those crossing borders less familiar, higher awareness may be more important than ever. The good news is that many resources exist to stay informed about evolving conditions around the world.

However, great costs can befall entire countries when information is general, irrelevant, out-of-date, or subjective. Tourism, especially in Africa, has been suppressed as a result of broad-stroke information by governments and amplified by the media as to health risks such as Ebola and security concerns. Declines in tourism have eroded economies in many countries on the continent.

As an example, let us consider the impact of the Ebola outbreak, whose epicenter in West Africa, particularly in Sierra Leone, Liberia and Guinea, is almost 8,000 kilometers from East Africa. By way of contrast, 5,567 kilometers separate New York City and London.

To forgo travel to East or South Africa because of the fear of contracting Ebola, or avoiding the beauty of the Serengeti because of tragedies in very localized areas, represents uninformed decision-making and a misunderstanding of the reality in most of Africa.

Effective communications about health and safety are vital and there should be no question regarding government's responsibility to share information to inform anyone traveling to areas of heightened threats or illnesses. But the following elucidates how certain information can impact countries:

"Kenya's coastal tourism is collapsing — a big part of the reason, Kenyan officials say — is because of Western travel warnings issued after a round of violence last summer in a remote coastal area. …'Our policy doesn't make much sense,' said the American official in Nairobi. 'There are neighborhoods in Washington, DC, for example, that are way more dangerous than Nyali or Diani," citing quiet Kenyan beach towns.'"[1]

Travel industry leaders such as Virgin's Richard Branson and Minor Group's William Heinecke have been outspoken about the jeopardy such advisories create.[2] As Branson says, blanket travel advisories are "effectively a ban on travel, rather than leaving people to make up their own minds after being given all of the information."

It would be irresponsible to downplay events that have impacted certain areas. But are there better ways to communicate what is necessary to know, while at the same time, recognizing and appreciating the importance of visitation – and the jobs depending on tourism?

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1   NYT 2-24-15 http://www.nytimes.com/2015/02/24/world/africa/as-tourism-sags-on-kenyan-coast-terrorists-could-lure-the-unemployed.html
2   Virgin 7-10-14 http://www.virgin.com/richard-branson/why-travel-advisories-hurt-countries-and-help-terrorists, TAT News 6-10-14 http://www.tatnews.org/open-letter-from-minor-group%E2%80%99s-bill-heinecke/

Sharing Local Perspectives

We see solutions for improved communications which serve the interests of both travelers and citizens of countries where security, health, and safety infringements have occured.

We believe Sir Richard Branson's observation that "all information" can be improved, made less generalized and subjective. Imagine if tens of thousands of responsible citizen advocates could be empowered to share their experienced-based views about conditions where they live and work? Imagine if it were possible to shape the public narrative away from the "FCO giving a false impression that all of Kenya is too dangerous to visit" towards knowledge-able and accurate "voices" from conscientious stakeholders on the ground expressing their perspective – and then made available to DMOs and visitors to understand what is really happening in Africa?

We believe innovations in information; both its creation and distribution, can increase traveler confidence, reverse tourism job attrition, showcase investment in Africa's infrastructure investment, and contribute to the development of a sustainable tourism sector.

According to Skift, travel warnings were issued most often for Africa. But travelers can still make up their own minds, balancing the warnings and press reports with other intelligence from the country. Technologies today are improving information flows and enhancing decision-making.

Africa's tourism economies should not be subject to misunderstanding or hyperbole. Neither should travelers be cavalier about travel decisions. Rather they should be better informed by the very constituents who know the area best: Africans themselves who, if their voices could be heard, would declare that Africa is open for business. ✳

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BUILDING PARTNERSHIPS: FOR ECONOMIC GROWTH

While Africa's burgeoning tourism industry holds great promise for economic growth and job creation, there is widespread recognition that this development agenda must be carefully managed and locally owned. Poorly managed tourism has disenfranchised and degraded local communities, and endangered ecosystems and cultures across the continent. Serious actions are needed to ensure that travel and tourism provide a means of protecting Africa's natural and cultural riches, as well as fostering mutual respect and tolerance, and creating sustainable economic opportunity.

With this objective in mind, Sustainable Travel International has convened the Destination Coalition of Africa (DCA), a regional initiative aimed at uniting governments, businesses, NGOs, and civil society across the continent to address these complex challenges and work collaboratively to generate tangible, quantifiable results

around economic development, job creation, and increased visitation and competitiveness.

DCA's approach utilizes a collective impact methodology to bring people together in a structured way to create large-scale and lasting social change. According to the global thinking on collective impact, the following criteria are critical in the development of successful partnerships. We have considered these and addressed lessons learned from other successful initiatives in the Caribbean, Latin America, and South Pacific in establishing the DCA:

Common Agenda & Stake: Representatives from the government, private, and nonprofit sectors must have a shared vision for change, including a common understanding of problems, risks, and vulnerabilities.

Everyone needs to have a stake in addressing each prioritized challenge through mutually agreed-upon actions. For example, by setting a goal to improve 1.3 million people's lives in the Caribbean and Central American region by 2017, the Sustainable Destination Alliance for the Americas (SDAA) has succeeded in uniting public and private entities, such as Royal Caribbean Cruises Ltd. and the Organization of American States, to support sustainable destination management programs across the region.

Tracking and Reporting Progress: All participants must agree on the metrics for measuring and reporting

HARNESSING TOURISM & COMMUNITIES

on success, using a shared monitoring system, and agree to consistently collect data and report on results. This ensures that all efforts remain aligned, encourages all parties to learn from one another's successes and failures, holds everyone accountable, and provides Ministries of Tourism with quantifiable data to strengthen the socio-economic importance of the sector.

Fostering Mutually Agreed-upon Activities: All cross-sector stakeholders involved in the planning and implementation of projects are required to perform activities at which they excel or that are aligned with their mandates. Activities must be coordinated and mutually reinforcing across sectors to multiply impacts. For example, the MesoAmerican Reef Tourism Initiative (MARTI) enables a variety of core partners to work together to increase good practice in hundreds of tourism-related businesses across the Riviera Maya and Honduras, while strengthening destination-level management policies, programs, and systems to significantly improve reef health.

Encouraging Ongoing Communication: All stakeholders must learn to trust one another and gain an appreciation of the common motivation behind their various efforts. This requires regular meetings, a shared vocabulary, and support from external facilitators, structured agendas, and ongoing participation in stewardship councils. We work with destinations not only to keep the channels of communication open across sectors, but also to enhance the promotion of their achievements to targeted audiences, helping them to develop a plan for positioning their unique assets, communicating their progress around sustainability, and securing brand loyalty.

DCA will utilize this time-tested methodology to build successful partnerships across the continent, with a vision of harnessing tourism for economic growth in communities. Sustainable Travel International and its partners believe that, by working together, we can share lessons learned and collaborate on solutions that will maximize our collective impact. ✿

Daniella Sachs,
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SPOTLIGHT ON KENYA TOURISM

COUNTRY FACTS

President: President Uhuru Kenyatta

Major Cities: Nairobi (capital), Mombasa, Kisumu

Population: 45,546,000 (2014)

Official Language(s): English, Kiswahili

Government: Republic

Currency: Kenyan shillings (KES)

TOURISM LANDSCAPE

Tourism Minister: Honorable Phyllis Kandie, Cabinet Secretary, East African Affairs, Commerce, and Tourism

Tourism Administration: Kenyan Ministry of East African Affairs, Commerce, and Tourism; Kenya Tourism Federation (KTF)

Tourism Promotion: Kenya Tourism Board (www.magicalkenya.com)

Marketing Tagline: Magical Kenya

2014 TOURISM STATISTICS

Total Receipts: US$ 798 Million

Direct Contribution to GDP: 4.1%

Total Contribution to GDP: 10.5%

Direct Contribution to Employment: 3.5 % (206,500 jobs)

Total Contribution to Employment: 9.2 % (543,500 jobs)

AIR TRANSPORTATION

National Airlines: Kenya Airways, the "Pride of Africa"

Airports: JKIA: Jomo Kenyatta International Airport in Nairobi, Moi International Airport in Mombasa, Moi International Airport in Eldoret

NOTABLE FACTS

- Home to Mount Kenya, Africa's second highest peak

- Six UNESCO world heritage sites, including:

  - Lake Turkana National Parks

  - Mount Kenya National Park/Natural Forest

  - Lamu Old Town

  - Sacred Mijikenda Kaya Forests

  - Fort Jesus, Mombasa

  - Kenya Lake System in the Great Rift Valley

Sources: AfDB. *African Statistical Yearbook 2015*, CIA World Factbook, Euromonitor International, Kenya Tourism Board, WTTC, and UNWTO.

AFRICA TRAVEL ASSOCIATION (ATA)

The Africa Travel Association (ATA) is the world's leading travel trade association promoting travel and tourism to Africa and strengthening intra-Africa partnerships to make it happen. Established in 1975, ATA serves both the public and private sectors of the international travel and tourism industry. ATA membership comprises African governments, their tourism ministers, tourism bureaus and boards, airlines, cruise lines, hotels, resorts, front-line travel sellers and providers, tour operators and travel agents, students and young professionals, multi-platform media, and affiliate industries. ATA's annual events in Africa and the United States bring together government leaders and industry professionals to shape Africa's tourism agenda and showcase the continent's latest trends and products. ATA is registered as a non-profit trade association with headquarters in New York and chapters around the world.

www.africatravelassociation.org

NEW YORK UNIVERSITY-AFRICA HOUSE

New York University-Africa House is an interdisciplinary institute devoted to the study of contemporary Africa, focusing on economic, political, and social issues on the continent and programs in the Arts. Part of Africa House's core mission is to advance the understanding of the links between Africa and the rest of the world, through the social, historical, economic and other lenses. Related to this, we also have relationships with African immigrant communities in New York City. NYU has a large number of professors and students doing research in the areas of economic development, economic growth and macroeconomics, microfinance, analysis of the effectiveness of foreign aid, politics and political economy, law and legal institutions. Africa House regularly convenes high level talks and seminars, and has in the past welcomed African heads of state. NYU-Africa House programs take place in New York City and in various capitals in Africa.

www.nyuafricahouse.org

AFRICAN DEVELOPMENT BANK GROUP (AFDB)

The African Development Bank Group (AfDB) is a regional multilateral development finance institution established to contribute to the economic development and social progress of its 54 Regional Member Countries (RMCs). The AfDB was founded following an agreement signed by member states on August 14, 1963, in Khartoum, Sudan, which became effective on September 10, 1964. The AfDB comprises three entities: the African Development Bank (ADB), the African Development Fund (ADF) and the Nigeria Trust Fund (NTF). As the premier development finance institution on the continent, the AfDB's mission is to help reduce poverty, improve living conditions for Africans, and mobilize resources for the continent's economic and social development. The AfDB headquarters is in Abidjan, Côte d'Ivoire.

www.afdb.org