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## **AFRICAN TOURISM STRATEGIC FRAMEWORK (2019-2028)**

**EXECUTIVE SUMMARY**

## INTRODUCTION

The global tourism industry has experienced virtually uninterrupted growth over the last two decades, despite occasional shocks, demonstrating the sector's strength and resilience. Similarly, in Africa, the tourism sector has proven itself to be a dynamic and fast growing sector, boasting virtually uninterrupted growth from 1995 to 2014. During this period, the region recorded annual average growth of 6% for arrivals and 9% for international tourism receipts and tourism export revenues (UNCTAD, 2017). In 2016, Africa witnessed 8% increase in visitor arrivals following a weaker performance in 2014 and 2015 occasioned by various health, geopolitical and economic challenges. The region welcomed 63 million international tourists in 2016 representing 4.7% of the world total, 4 million more than in 2015. This earned the region US\$ 35 billion in international tourism receipts (representing a 2.9% share) (UNWTO, 2017). The sector continues being a key economic sector in Africa generating 8% of the continent's Gross Domestic Product valued at over USD 165 billion in 2016 and accounting for 6.5% of total investments. The tourism industry is also an important employer in Africa. In the period 2011-2014, tourism generated on average more than 21 million jobs, or approximately one out of 14 jobs in the region with its share of the region's total employment standing at 7.1% and contributing over 10% to the total employment in 12 countries.

This performance notwithstanding, Africa's tourism generally remains uncompetitive on number of fronts. First, the region's share of international tourism receipts has remained the lowest, accounting for roughly 5% of global international arrivals and about 3% of global tourism receipts. More so, Africa's tourism seems to attract the lowest spenders with an average spending per visitor of USD 600 against a global average of USD 990. In addition, in spite of the region being the world's second largest and second most populous continent, with a market of 1.2 billion people having a growing increasing disposable incomes, Africa's tourism has largely ignored the regional market with much of the industry traditionally targeting international tourists from outside the region in particular, Europe and North America. Only 4 out of 10 international tourists to Africa originates from Africa in 2010–2013, a far cry compared to 4 out 5 global average. Noting the above, need exists for a strategic response to Africa's underperforming and uncompetitive tourism sector both within the domestic market and foreign markets. This requires tackling the challenges currently limiting the growth and development of Africa's tourism industry relating to destination and product development, promotion and marketing, accessibility, investment in tourism infrastructure, safety and security, natural and cultural heritage, and lack of a harmonized tourism framework and institutions, among others.

The African Tourism Strategic Framework 2019-2028 (ATSF 2019-2028) is formulated in line with the recognised socio-economic potential of the tourism industry as espoused in the AU Agenda 2063 flagship of *'making Africa the preferred destination for tourism* and the requisite need for a continental tourism development framework as

affirmed by the First Ten-Year Implementation Plan of the Agenda 2063, the Seychelles Communiqué 2014, the 2017 Lomé Ministerial Declaration, and the Plan of Action for Tourism (2017-2019).

The Tourism Strategic Framework 2019-2028 seeks to provide strategic action plan geared towards development of a competitive, sustainable and integrated tourism industry in Africa. This, the framework pursues through synchronisation of ongoing sectoral strategies and plans within the framework of the African Union as well as the various Regional Economic Communities (RECs).

### ***I. Guiding Principles for African Tourism Strategic Framework 2019-2028***

Given Africa's tourism development context and the continents aspirations as expressed in the broader goals of the Agenda 2063 and its FTYIP 2013-2023, and the need to mainstream the relevant UN Agenda 2030 for Sustainable Development into Africa's tourism development agenda, the African Tourism Strategic Framework 2019-2028 is guided by the following principles:

1. Africa's Tourism industry becomes a driver for regional integration facilitating movement of, interactions and mutual appreciation among the African people.
2. The ATSF 2019-2028 should be aligned with the relevant existing global and continental socio-economic development initiatives particularly, the UN 2030 Agenda for Sustainable Development and the AU Agenda 2063.
3. Tourism development in Africa pursues sustainability principles ensuring a sustainable balance between economic benefits and socio-cultural and environmental costs.
4. The Tourism development framework for Africa should provide ways to build local capacity for tourism development including providing for the requisite policies geared toward ensuring skills training, access to development funding and market, and integration into the mainstream tourism value chain.
5. The Framework should ensure deepening of partnerships between the public and private sectors, development partners, and civil society in an effort to build synergies at all levels including national, RECs and Continental level.
6. The development of tourism in Africa pursues an integrated approach with specific focus on developing and optimizing its value chain and creating policy-convergence and synergies with relevant economic sectors.
7. Tourism development policies and decisions in Africa be grounded on sound research

### ***II. Aim and Objectives of African Tourism Strategic Framework (2019-2028)***

In view of the noted potential of the tourism industry to contribute to realisation of the UN Agenda 2030, spur Africa's economic transformation and drive continental integration, the main aim of this strategy is to provide a pathway through which the FTYIP tourism targets can be achieved. These include the increase in real terms of 100% contribution to GDP and the doubling the 2013 levels of intra-regional tourism by 2023. To realise this aim, the African Tourism Strategic Framework 2019-2028 provides strategies and actions geared towards the realisation of the following objectives

1. Elevation and appreciation of the tourism industry' significance to Africa's economic transformation and continental integration, playing a key role in the realisation of relevant continental socio-economic aspirations.
2. Development of a competitive tourism industry that will increase Africa's share of global tourism in terms of visitor arrivals, receipts and investment.
3. Tourism development in Africa pursues sustainability principles ensuring a sustainable balance between economic benefits, and social and environmental costs.
4. Formulation of a strategic and policy framework for building and enhancing local capacity for development of the tourism industry including skills training and entrepreneurship development.
5. Deepening of broad-based partnership for Africa's tourism development including the public and private sectors, development partners, and civil society at all governance levels- National, Regional and Continental level.
6. Mainstreaming of gender and inter-generational inclusivity in Africa's tourism development with specific focus on the empowerment and inclusion of youth and women.
7. Establishment and sustainable operationalization of African Tourism Organisation as an institutional coordinator and driver for continental tourism development.

### **III. Vision and Mission of African Tourism Strategic Framework 2019-2028**

#### **A) Vision**

Consistent with the African Union Agenda 2063 flagship project of *making Africa the preferred tourism destination* and the provisions of the AU Plan of Action for Tourism (2017-2019), the vision for the African Tourism Strategic Framework 2019-2028 is that:

**“Africa becomes the preferred destination for tourism offering unique and diverse African experience and committed to sustainable and inclusive tourism development that contributes to regional integration and the socio-economic well-being of the African People.”**

#### **B) Mission**

The mission for the African Tourism Strategic Framework 2019-2028 is to

**“Provide a guiding framework for the development of a competitive and sustainable tourism industry in Africa that maximizes its contribution to the Continent’s economic growth, becoming a catalyst for integration of the African People, and preserving her rich cultural and natural heritage.”**

#### ***IV. Tourism Growth Targets under the African Tourism Strategic Framework 2019-2028***

The overall expected outcome of the African Tourism Strategic Framework 2019-2028 is realisation the Africa Union’s Agenda 2063 aspiration of *making Africa the preferred destination for tourism*, with the industry becoming a key economic sector for the region’s economic transformation, a driver for continental integration, and a key source sector for Domestic Resource Mobilization (DRM) to finance the Agenda 2063. Specifically, the ATSF seeks to realize the targets of Agenda 2063 FTYIP for the tourism sector. Given that the strategic programs and projects are fully resourced and implemented, it is anticipated that by 2028

1. Total international arrivals to Africa will have tripled from 58 million international tourists realized in 2016 to 174 million visitors
2. The share of intra-African arrivals to international arrivals will increase from 46% realized in 2015 to 80%
3. Revenue from overseas tourism, excluding air fares and ferry charges, will triple from USD 35 billion realised in 2016 to USD 105 billion
4. The contribution of tourism to Africa’s GDP will triple from USD 165 billion realized in 2016 to USD 495 billion
5. Tourism industry’s share of total employment in Africa will increase from 10% realised in 2016 to 15%
6. The level of tourism investment of USD 26 billion realised in 2014 will triple to USD 78 billion

#### ***V. African Tourism Strategic Framework 2019-2028 Strategic Directions***

To realise the vision and targets of the African Tourism Strategic Framework 2019-2028 targets, it will be necessary to focus on key priority intervention areas considered essential to guarantee competitiveness and which would serve as key frameworks for sustainable and long term tourism growth. The framework addresses this by identifying areas of regional partnership in tourism development and provides a framework to guide tourism development at country level. In this context, the ATSF 2019-2028 seeks to pursue THREE core Strategic Directions:

1. Develop a globally competitive African Tourism brand
2. Ensure that African tourism is sustainable, inclusive and a driver for regional integration
3. Formulate an enabling tourism policy, regulatory and institutional framework

Twelve Strategic Priority areas are identified for implementation to deliver the vision, outcomes and impacts sought by the African Tourism Strategic Framework 2019-2028. The Strategic Directions and Priority Areas are presented in Figure 1.1:

## **VI. ATSF 2019-2028 areas of Continental- level joint action**

### **STRATEGIC DIRECTION 1: DEVELOP A GLOBALLY COMPETITIVE AFRICAN TOURISM BRAND.**

#### **Priority Area 1.1: Quality and Diversified Tourism Product**

**Objective 1:** Enhancing the appeal of the existing tourism products

1. Develop cohesive Regional Tourism Service Standards
2. Development of a Regional Tourism Accreditation Programme

**Objective 2:** Expanding and diversifying the tourism product.

1. Develop trans-boundary products

**Objective 3:** Deepen efforts to develop intra-African travel market

1. Lobby for affirmative region-based rotational hosting of current continental events
2. Provide an enabling environment for enhanced intra-African mobility
3. Lobby for Increased trade relationships among African States

#### **Priority Area 1.2: Development of Tourism Facilities and Services**

**Objective 1:** Enhance the capacity of the existing tourist facilities in the continent

1. Institutionalize the classification of hospitality facilities
2. Develop Continental Quality Management Systems for the different sub-sectors of the tourism industry.

**Objective 2:** Promote investments in tourism infrastructure

1. Encourage lending institutions to support tourism investments
2. Encourage cooperation and an integrated approach to promoting tourism investment in the region

#### **Priority Area 1.3: Tourism Promotion and Marketing**

**Objective 1:** Enhance the global visibility of Africa's tourism brand.

1. Develop an African Tourism Brand and a Marketing Strategy
2. Pursue a unified promotional effort in the international marketplace

**Objective 2:** Disseminate and manage destination information

1. Develop a Destination Management System and AU Tourism Portal

#### **Priority Area 1.4: Destination Accessibility and Support Infrastructure**

**Objective 2:** Create an enabling transport infrastructure for enhanced destination accessibility

1. Lobby for the on-going cross-regional infrastructure development initiatives to support tourism development in Africa

### **Priority Area 1.5: Tourism Human Resource Development**

**Objective 1:** Bridge the short-term HR needs for Africa's tourism sector.

1. Reduce barriers to intra-regional labour mobility to ensure low-capacity Member States attract external expertise and skills to bridge the short-term HR deficit

**Objective 2:** Develop Sustainable supply of globally competitive human resource for the tourism sector in Africa

2. Harmonize tourism training and certification amongst AU Member States
3. Establishing centres of excellence in tourism training across the continent

**Objective 3:** Formulate appropriate policies to encourage labour mobility across the region

1. Identify and formulate relevant policy framework for intra-regional labour mobility

## **STRATEGIC DIRECTION 2: AFRICAN TOURISM IS SUSTAINABLE, INCLUSIVE AND A DRIVER FOR REGIONAL INTEGRATION**

### **Priority Area 2.2: Increased Inter and Intra-African Travel**

**Objective 1:** Creation and promotion of tourist products focused on attracting the African market

1. Create all-Africa sports in addition to the existing ones
2. Adopt a uniform tourism product pricing structure for African residents

**Objective 2:** Enhancing intra-African mobility

1. Adopt specific and deliberate policy and regulatory measures to facilitate efficient and affordable intra-African transportation system.
2. Enhance measures to remove barriers to intra-regional mobility

### **Priority Area 2.3 Visitor Safety and Security**

**Objective 1:** Focus on continued and concerted efforts towards lasting peace and security in the region

1. Incorporate a tourism safety and security action plan in the AU security plan

**Objective 2:** Develop Risk and Disaster Management systems to address safety and security concerns

1. Formulate regional Framework for Tourism Risk and Disaster Management

### **Priority Areas 2.4 Natural and Cultural Heritage Conservation and Protection**

**Objective 1:** Enhance biodiversity conservation efforts

1. Develop a regional biodiversity conservation framework

**Objective 2:** Increase responsiveness of Africa's tourism to Climate Change

1. Formulate a framework for Africa's tourism response to environmental issues and climate change mitigation, adaptation and resilience

**Objective 3:** Promote preservation and appreciation of Africa's rich cultural heritage as a niche tourism product

1. Develop ethical guidelines for cultural-based tourism products

### **STRATEGIC DIRECTION 3: ADOPT AN ENABLING TOURISM POLICY, REGULATORY AND INSTITUTIONAL FRAMEWORK**

#### **Priority Area 3.1: Establish an enabling Tourism Policy, Regulatory and Institutional Framework**

**Objective 3:** Establish appropriate institutional framework for the tourism industry

1. Establish the African Tourism Organization
2. Nominate Strategic Champions for specific programme areas.

#### **Priority Area 3.2: Research and knowledge Management**

**Objective 1:** Create a framework for tourism research and development within the African region

1. Establish an integrated tourism statistics system both at National and Continental level
2. Establish an integrated tourism statistics system both at National and Continental level

#### **Priority Area 3.3: Financing Tourism Development**

1. Identify and adopt mechanisms and strategies to ensure sustainable funding of the African Tourism Organisation (ATO)

#### ***VII. Indicative budget for implementing continental level projects***

Implementation and evaluation of the ATSF 2019-2028 is estimated to cost an indicative budget of USD 2,800,000.

#### ***VIII. Monitoring and Evaluation Framework***

The overall M&E Plan will involve annual evaluation throughout the 10- year implementation of the ATSF 2019-2028. This will facilitate adding or adapting indicators, adjusting data gathering methods and schedules, include new evaluation tools, adjust activities, and respond to any new initiatives that may be undertaken.

Annual reviews will be undertaken at national level. Comprehensive termly implementation review will be undertaken at the end of each of the two implementation

cycles (end of Year 5 and year 10). This review will be mainly done at both REC and AU level.

The supervision of the design, implementation and monitoring and evaluation of the ATSF 2019-2028 will be undertaken at three levels: Continental level, REC level and national level. AU Member States will be responsible for implementation of national – level Strategic Programmes. The African Union through the African Tourism Organisation and other key organs, will oversee implementation of continental level programmes and actions. The RECs will be responsible for coordinating and monitoring implementation of programmes and actions within the particular region.

The implementation of this ATSF 2019-2028 is to a great extent anchored on the formation of the continental tourism organisation (the African Tourism Organisation). It is therefore imperative that ATO is instituted to spearhead the implementation of this Strategic Framework. This notwithstanding, in its absence, the AUC would spearhead implementation of the ATSF2019-2028 through the relevant organs within it.