



# **The SAGE International Encyclopedia of Travel and Tourism**

## **Travel Trends in Africa**

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The number of inbound visitors to Africa has been growing fast during this century, especially in sub-Saharan Africa. Traditionally, the countries with the highest number of arrivals have been Morocco, South Africa, Egypt, and Tunisia, but the latter two have suffered the effects of domestic political unrest. New destinations are emerging, such as Angola, Mozambique, Rwanda, Burundi, Ethiopia, and Cape Verde. The figures for outbound travel from Africa remain small, compared with other parts of the world, although they are expected to rise due to economic growth. African countries are still lagging in terms of travel and tourism competitiveness. The liberalization of the aviation sector has improved accessibility, but land transportation is increasingly affected by congestion. The development of tourism is also hindered by safety, security, and health concerns.

### **Inbound Travel**

According to the United Nations World Tourism Organization (UNWTO), Africa received 55.9 million international visitors in 2013, more than double of the number of visitors in the year 2000 (26.2 million). The growth was considerably higher in sub-Saharan Africa (from 16 million to 36.3 million) than in North Africa (from 10.2 to 19.6 million). Africa was the only region where the number of international arrivals grew during the world economic crisis in 2009. The growth in the number of arrivals to Africa during that year was 3.4% (2.5% in North Africa and 4.4% in sub-Saharan Africa), compared with an average loss in the number of arrivals worldwide of 3.9%. However, the growth in international arrivals has decelerated since 2010, compared with the 2000 to 2010 period. In sub-Saharan Africa, the annual average growth rate decreased from 7% during the period from 2000 to 2010 to 5% during the subsequent 3 years. In North Africa, the annual average growth rate decreased from 6% during the period from 2000 to 2010 to 1% in the following 3 years.

Despite the upward trend, the continent's share of worldwide international travel remains small, at 5.1%. The share of expenditures is even lower, at 3%. The UNWTO expects that the African share in the number of international arrivals will reach 7.4% by 2030. The main drivers of the growth in the period 2010 to 2030, estimated at an average of 5% per year, will be West and Central Africa (5.9%) and East Africa (5.8%).

The growth of the travel and tourism industry in Africa is also evident when looking at figures from the supply side. According to the World Travel and Tourism Council (WTTC), the industry accounted for 1.9 million jobs in North Africa and 3.3 million jobs in sub-Saharan Africa in 2000. In 2014, the values were estimated at 2.8 million and 5.6 million, respectively, and were forecasted to reach 3.6 million and 7 million in 2024.

### **Destinations**

The number of tourist arrivals in Africa is not equally distributed among the different regions: North Africa accounts for 20%, East Africa for 15%, Southern Africa for 14%, West Africa for 6%, and Central Africa for 1%. The distribution of arrivals within each region is also concentrated in a small number of countries. For example, South Africa receives 66% of the arrivals in Southern Africa, and Senegal and Nigeria account for 78% of visitors to West Africa.

Overall, the countries receiving the largest number of visitors are Morocco (10 million arrivals in 2013), South Africa (9.5 million), Egypt (9.2 million), and Tunisia (6.3 million). South Africa leads the ranking of countries by tourism expenditure. The share of these four countries in the overall number of arrivals to Africa has been decreasing. Arrivals in South Africa grew slowly

until 2008 and dropped in 2009. The number of visitors only returned to 2009 levels in 2013, despite an increase of 15% in 2010, due to the organization of the FIFA World Cup. The growth of tourism to Morocco has also decelerated, from an annual average growth of 8.1% in the period from 2000 to 2010 to 2.7% from 2010 to 2013. This trend is probably linked to the effects of the economic crisis in European countries, which are the major markets for the Moroccan tourism industry. Political instability had a marked effect on tourism to Egypt and Tunisia in recent years. Arrivals in Egypt grew at a rate of 10% per year until 2010 but then dropped 32% in 2011, partly recovering in 2012, but dropping again in 2013. Tourism in Tunisia grew slowly until 2010 but fell in 2011.

The highest growth rates in tourist arrivals in Africa during this century are found in countries recovering from civil wars and experiencing rapid economic growth. The number of international visitors to Angola grew from 51,000 to 650,000 in the period from 2000 to 2013, representing an annual average growth rate of 21.6%. Mozambique received 1.9 million visitors in 2013 and is now in the top 10 of the countries with highest number of arrivals in Africa. This number has been growing at a rate of 15.8% per year since the year 2000. Other fast-growing tourism destinations include Rwanda (annual growth rate of 18.7%), Burundi (17.2%), and Ethiopia (13.1%).

African island countries have emerged as important destinations for international tourism. Cape Verde is often cited as a success story. Arrivals in the country have been growing at an annual rate of 12% since 2000, benefiting from improved air accessibility, investment in the travel and tourism infrastructure, promotion of the country abroad, and political stability. The WTTC placed Cape Verde in the list of the 10 countries with the highest expected growth in the tourism sector in the period 2014 to 2024. Mauritius and Seychelles have also consolidated their position as tourism destinations. In contrast, the tourism potential in the island countries of Comoros and São Tomé and Príncipe is still largely untapped.

The main source markets for travel and tourism in most African countries tend to be European countries with which they have historical links. United Kingdom is the main origin of visitors to most Commonwealth countries; France is the main source market for most countries in North, West, and Central Africa, and Portugal is the main market for Angola, Mozambique, Guinea-Bissau, Cape Verde, and São Tomé, and Príncipe. However, many countries in Africa are seeing an increase of arrivals from other African countries. For example, more than half of the arrivals in Namibia in 2010 were from South Africa and Angola. South Africa also receives a large number of visitors from neighboring countries, due to the position of the country as a regional hub. The UNWTO expects that by 2020, intraregional trips will account for 75% of arrivals in African countries.

## **Outbound Travel**

According to the UNWTO, Africa accounted for 33.4 million trips in 2013, representing 3.1% of worldwide outbound travel. This value is low when compared with the share of the continent in the world population of 15%, but consistent with its share of world income of 3%. The average annual growth of outbound travel from Africa during the period from 2005 to 2013 in Africa was 7.1%, higher than other continents, and well above the world rate of 3.8%. South Africa is the country with the largest number of international departures (around 5 million departures), following by Egypt (4 million).

## **Competitiveness**

Despite the fast growth in the number of international visitors, African countries are still lagging in terms of competitiveness. African countries occupy five of the six bottom positions in the 2013 ranking of travel and tourism competitiveness published by the World Economic Forum (WEF). Only three countries were placed in the top half of the ranking: Seychelles (38th among 140 countries), Mauritius (58th), and South Africa (64th). However, Seychelles and Mauritius occupied the 1st and 3rd position in the subranking for the degree of prioritization of travel and tourism. This was due to the high expenditure in the sector as a proportion of the countries' GDP: 22.3% in Seychelles and 16.3% in Mauritius.

Despite having an income below the world average, African countries are not at an advantage in terms of price competitiveness. Only The Gambia and Egypt are in the top 10 of the countries in the WEF subranking for price competitiveness in the travel and tourism industry. Other countries are close to the bottom of the ranking, including Chad, Senegal, and Seychelles. Data from other sources also confirm the lack of price competitiveness of African cities. According to Mercer's 2014 Cost of Living Survey, which covered 211 cities, Luanda (Angola) is the most expensive city in the world for expatriates, followed by N'Djamena (Chad). This is explained by insufficiencies in infrastructure and reliance on imported goods. For example, Angola imports three quarters of the goods consumed in the country. Victoria (Seychelles) and Libreville (Gabon) are also in the top 20 of the world's most expensive cities.

### Economic Trends

The economic growth happening in many African countries is the main factor behind the upward trend in both inbound and outbound travel. According to World Bank data, countries in sub-Saharan Africa grew at an average of 5.3% per year in the period from 2000 to 2010 and 3.9% in the period from 2010 to 2013, compared with world averages of 2.6% and 2.5% in the two periods. The annual average growth rate during the 2000 to 2010 decade was especially high in Equatorial Guinea (14.7%), Angola (11.3%), and Chad (10.7%), although the growth rate has decelerated in the three countries in recent years. In contrast, the Ethiopian economy is growing faster (annual average growth rate of 8.6% in the 2000–2010 period and 10.1% in the 2010–2013 period).

The growth of the middle class increases the market for leisure travel. According to the African Development Bank, the African middle class is expected to grow from 355 million in 2010 to 1.1 billion in 2060. However, the proportion of the middle class in the total population is only projected to increase 9%, from 34% to 43%. In fact, economic growth in Africa is not leading to the dramatic reduction of poverty experienced in other continents. African economies are still characterized by high levels of income inequality. According to the World Bank, seven of the ten countries with the highest income inequality are located in Africa. Data from the United Nations Development Programme show that, for example, the richest 10% of the population in Namibia have an average income 100 times higher than the poorest 10%.

Economic growth also contributes to the increase in international arrivals. For example, the rapid growth in the number of arrivals in Angola is in part explained by the increase in business trips, linked to the country's rapid economic growth. Uneven trends in the population and income growth in different countries may also lead to an increase of short-term or long-term migration, with an impact on international travel.

The increase in the GDP also facilitates investment in the travel and tourism industry, increasing the attractiveness of the countries for tourists. However, it has been noted that in some cases, large investments were made in the construction of showpiece projects for

international events (such as the Africa Cup of Nations in Equatorial Guinea) that are expensive to maintain and have little impact in other sectors of the economy.

### **Transport and Accessibility**

Air transport is crucial to the development of the travel and tourism industry in Africa, given the size of the continent and the distance from the main tourism markets. The poor connectivity between different regions and the cost of flights have been limiting factors. A report for the World Bank found that Africa is served by only 4% of all scheduled flight seats in the world and that airfares in Africa are more than double those of flights with similar lengths within the United States.

Developments since the 1990s have improved air travel in Africa. The Yamoussoukro Decision was adopted in 1999 to liberalize the aviation industry in the continent, which has led to the increase in air traffic, improvement in service quality, and decrease in tariffs. Overall, the air industry has been growing fast, although some regions, such as Central Africa, are lagging behind. Ethiopian Airlines has become Africa's most profitable airline and is one of the fastest-growing airlines in the world, more than quadrupling the number of passengers carried from 2005 to 2013. The entry of low-cost airlines in the market is also contributing to an increase in inbound travel to Africa and in long-distance travel within the continent. Ryan Air and Easy Jet link Europe with Morocco and Egypt. Fastjet, an Africa-based low-cost airline, has commenced operations in 2012 and links Tanzania with Uganda, Zambia, Zimbabwe, and South Africa.

The lack of good land transport infrastructure remains a limitation. One fifth of the Trans-African Highway Network, a project formulated in 1971 by the UN Economic Commission for Africa, was still missing as of 2014. Population increase and economic growth are leading to a rapid increase in road traffic levels. Congestion is an increasing problem in main trunk roads and in large urban areas, as road capacity is unable to meet travel demand. Despite the problems created by the increase in road traffic, according to the World Health Organization, only two countries in Africa (Ethiopia and Namibia) have national policies that encourage nonmotorized travel modes as an alternative to private vehicles.

### **Safety and Security Issues**

Inbound tourism to Africa and travel within the continent are affected by frequent political and military conflicts. Five of the 10 countries in the bottom of the Institute for Economics and Peace's 2014 Global Peace Index ranking were located in Africa (South Sudan, Somalia, Sudan, Central African Republic, and Democratic Republic of the Congo). Countries with high tourism potential remain virtually close to visitors due to safety and security concerns. This is, for example, the case of Somalia, which has been plagued by internal conflicts for some decades, and affected by terrorism and piracy. The instability that tends to follow elections in many countries also contributes to create a negative image of the continent.

Safety and security concerns are an issue in all African regions. In North Africa, political unrest since 2011 has had a negative impact on inbound tourism to Egypt, Tunisia, Libya, and Algeria. In West Africa, interreligious strife in Nigeria has intensified since the year 2000. In East Africa, several terrorist attacks have occurred in Kenya since 2002. In Southern Africa, Zimbabwe has experienced continued social unrest. Most other countries have been affected by violent incidents during the last decade.

Fear of crime is another deterrent to potential visitors to African countries. For example, in a survey for the South African government, a third of potential tourists mentioned safety concerns as a reason for not visiting the country. Countries that traditionally had a relatively low crime incidence (compared with other African countries) have witnessed a steady increase in crime during the last decade, including Cape Verde and Mozambique.

Inbound travel to Africa is also negatively affected by epidemics. The outbreak of the Ebola virus disease in 2014 hit countries in West Africa, especially Guinea, Liberia, and Sierra Leone. The outbreak led several governments to place restrictions on travel to and from these countries and indirectly affected travel to other regions in Africa, as some potential tourists associated the epidemics with the whole continent. Insufficiencies in the health care infrastructure are still a limitation to travel in most African countries. According to the World Health Organization, 27 of the 30 countries in the bottom ranking of the density of physicians are located in Africa.

### Other Issues

Visa regulations remain a major barrier for the development of tourism in Africa, especially in countries in Central and North Africa, but several countries in Africa have opened up visa procedures in recent years. According to the World Economic Forum, São Tomé e Príncipe, Djibouti, Mozambique, Rwanda, Burundi are in the top 10 of the countries with the highest number of improvements in the period 2010 to 2012. However, international overland border crossings are still problematic in almost all countries. Internal travel is also restricted by legal and illegal road controls.

The image of Africa has been tarnished during the last decade by the growing hostility toward sexual minorities in several countries. Uganda drew international condemnation after approving a law imposing penalties for same-sex relations. International media have also reported the rise in discriminatory laws and hate crime against sexual minorities in Nigeria, Senegal, the Gambia, Cameroon, Kenya, Malawi, and Zimbabwe. While there is only anecdotal evidence on the negative effect of this trend in the tourism industries in these countries, the potential long-term impact on the image of the continent is substantial.

Environmental issues are also beginning to influence travel trends in Africa. The growing worldwide demand for environmentally sustainable tourism has helped to develop the tourism industry in countries with large natural areas, most notably in Ethiopia. In addition, growing concern about the impact of mass tourism on environmentally sensitive areas has led some governments to implement policies to promote ecotourism.

*Paulo Rui Anciaes*

**See also** [Accessibility Issues in Travel and Tourism](#); [Bus Travel, Africa](#); [Highway/Freeway System, Africa](#); [Ecotourism](#); [Egypt](#); [Morocco](#); [South Africa](#); [Tourism Development](#); [Transportation and Infrastructure Issues in the Developing World](#); [Tunisia](#)

### Further Readings

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