

Factors Hindering Sustained Tourism Growth and Development In Sub-Saharan Africa

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Abstract

Despite the many unique and fascinating tourism attractions in Sub-Saharan Africa, the sub-region is still the least visited in the world. The reasons for the poor performance required an objective analysis. The main objective of this paper, therefore, was to identify and analyze the factors that hinder the full realization of Sub-Saharan Africa's tourism potential. Specifically, the study analyzed the following variables: location, accessibility, climate, attractions, infrastructure, facilities, services, and the image of the sub-region as an attractive tourist destination. The geographical scope of the study was confined to that part of Africa south of the Sahara Desert. The study was based primarily on secondary data sources. These included the World Tourism Organization (WTO), World Travel and Tourism Council, United Nations World Tourism Barometer, and the Regional Tourism Organisation of Southern Africa (RETOSA). They all compile annual reports as well as world tourism rankings by number of visits, revenue generated and employment created. The major findings of the study were that the weak state of tourism in Sub-Saharan Africa was due to: poor and circuitous connectivity with the major tourist generating countries as well as within the sub-region itself; inadequate and poorly developed tourism infrastructure and related facilities; widespread poverty; and a generally poor image. In addition, the study found that droughts and famine, as well as the prevalence of such diseases as HIV/AIDS, malaria, yellow fever and cholera had a negative impact. On the basis of these findings, the study recommends that governments of Sub-Saharan Africa should embrace good governance and the rule of law in order to reverse the sub-region's negative image. The study also recommends that governments should enter into partnerships with private sector bodies in order to improve the conditions of tourist attractions and infrastructure.

Key words: accessibility, poverty, political violence, destination image, infrastructure, game viewing.

Introduction

Globally, the tourism industry has assumed considerable economic and social significance. The industry is now one of the most rapidly expanding sectors in the world (Shaw and Williams, 2002). The benefits of tourism are usually felt at both the macro and micro levels. At macro level, tourism fosters economic growth

through foreign exchange earnings and an increase in state revenue. At micro level, it improves the people's well-being through job creation, income generation and distribution, and balanced regional development (Youell, 1998).

International Tourist Arrivals

In 2000, the United Nations World Tourism Organization (UNWTO) gave the number of international arrivals at 710 million, and was expecting this figure to reach 1.5 billion by 2020 (UNWTO, 2000). It also gave the number of domestic tourist movements at several times more than international tourists, especially in the western countries. In 2008, there were over 922 million international tourist arrivals, with a growth of 1.9% as compared to 2007.

In the first four months of 2013, international tourist arrivals grew by +4.3% to reach a total of 298 million (up by 12 million), despite a challenging global economic environment (UNWTO Barometer, 2013). Prospects for the current tourism peak season are positive, with 435 million tourists expected to travel abroad in the May-August period. Results were positive in all regions, with the strongest growth in Asia and the Pacific (+6%), Europe (+5%) and the Middle East (+5%). The weaker growth was in the Americas (+1%) and Africa (+2%). By sub-region, South-East Asia (+12%), South Asia (+9%) and Central and Eastern Europe (+9%) were the star performers.

The +4.3% growth in the number of international tourists crossing borders in the first months of 2013 confirms that tourism is one of the fastest growing sectors of our times, contributing in a central manner to the economy of a growing number of countries. Growth was stronger in emerging economy destinations (+4.6%) compared to advanced economies (+3.3%), a trend which has marked the sector for many years now. By region, growth was positive in all regions, but results were mixed.

According to UNWTO (2013), *Asia and the Pacific* (+6%) saw the highest relative growth boosted by arrivals in South-East Asia (+12%) and South Asia (+9%). International tourist arrivals to *Europe*, the most visited region in the world, were up by +5%; described as "an excellent result" in view of the economic situation in the region. Central and Eastern Europe (+9%) continues to lead growth, while Southern and Mediterranean Europe (+5%) also turned in strong results.

Africa (+2%) and the *Americas* (+1%) reported weak growth in the first four months of 2013, following the strong progress of 2012 (+6% and +5%, respectively). At the sub-regional level, results were flat in all sub-regions of the Americas except in Central America (+4%). In Africa, the +3% growth in Sub-Saharan Africa contrasts

with flat results in North Africa. Growth in the *Middle East* is estimated at +5%, though this figure should be taken with caution as it is based on limited available data (UNWTO, 2013).

Around 435 million tourists are expected to travel around the world during these four months which account for as much as 40% of all international tourist arrivals registered in a year. International air travel reservations for May-August from business intelligence tool Forward keys support this outlook with a +4% increase in bookings for that period. The highest growth is recorded in international flight reservations from Africa and the Middle East (+7%) and the Americas (+5%), followed by Europe (+3%) and Asia and the Pacific (+2%).

For the full year 2013, international tourist arrivals are expected to increase by +3% to +4% in line with UNWTO's long-term forecast of +3.8% per year for the period 2010 to 2020. According to the World Tourism Organization (UNWTO, 2009), from 2006 to 2009, the following ten countries were the most visited by international travelers.

Table 1.2 Arrivals in the Top Ten Tourist Destinations (millions)

Rank	Country	UNWTO Regional Market	Tourist arrivals (2009)	Tourist arrivals (2008)	Tourist arrivals (2007)	Tourist arrivals (2006)
1	France	Europe	74.2	79.2	80.9	77.9
2	United States	N. America	54.9	57.9	56.0	51.0
3	Spain	Europe	52.2	57.2	58.7	58.0
4	China	Asia	50.9	53.0	54.7	49.9
5	Italy	Europe	43.2	42.7	43.7	41.1
6	United Kingdom	Europe	28.0	30.1	30.9	30.7
7	Turkey	Europe	25.5	25.0	22.2	18.9
8	Germany	Europe	24.2	24.9	24.4	23.6
9	Malaysia	Asia	23.6	22.1	21.0	17.5
10	Mexico	Latin America	21.5	22.6	21.4	21.4

Source: UNWTO Tourism Highlights (2010)

It will be noted from the table that, compared to 2006, Ukraine entered the list of the top ten, thereby surpassing Russia, Austria and Mexico (UNWTO, 2008), and surpassed Germany in 2008. In 2008, the U.S. displaced Spain from the second place. In the same year, Malaysia attained the ninth position, just below Turkey and Germany. France continued to lead the ranks in terms of tourist arrivals (UNWTO, 2010). It is pertinent to point out that, out of the top visited countries, none of them is from Sub-Saharan Africa.

Table 1.2 also shows that tourist arrivals differed, not only in temporal terms, but also from a spatial perspective. As can be seen, some regions were able to attract far more tourists than others, with Europe, North America and the East Asia Pacific Realm getting the lion's share, while Sub-Saharan Africa was conspicuous by its absence (UNWTO, 2008).

International Tourist Receipts

In terms of expenditure, in 1985, international and domestic tourism accounted for global expenditure equivalent to \$1,800 billion (Gunn, 1988), and the leisure industries for an even higher level. In 1999, international tourism alone accounted for receipts of \$455 billion [WTO, 2000]. In 2008, the receipts grew to US\$944 billion, corresponding to an increase in real terms of 1.8% from 2007 (UNWTO, 2009). When the export value of international passenger transport receipts is accounted for, total receipts in 2008 reached a record of US\$1.1 trillion, or over US\$3 billion a day (UNWTO, 2009).

Table 1.3 below shows the top ten countries that grossed the highest tourism receipts in 2009. It can be clearly seen that, although the United States continued to be the top earner, most of the top earning countries were from the European continent.

Rank	Country	Regional Market	Receipts (2009)	Receipts (2008)	Receipts (2007)	Receipts (2006)
1	United States	North America	\$93.9	\$110.0	\$97.1	\$85.8
2	Spain	Europe	\$53.2	\$61.6	\$57.6	\$51.1
3	France	Europe	\$49.4	\$55.6	\$54.3	\$46.3
4	Italy	Europe	\$40.2	\$45.7	\$42.7	\$38.1
5	China	Asia	\$39.7	\$40.8	\$37.2	\$33.9
6	Germany	Europe	\$34.7	\$40.0	\$36.0	\$32.8
7	United Kingdom	Europe	\$30.0	\$36.0	\$38.6	\$34.6
8	Australia	Oceania	\$25.6	\$24.8	\$22.3	\$17.8
9	Turkey	Europe	\$21.3	\$22.0	\$18.5	\$16.9
10	Austria	Europe	\$19.4	\$21.6	\$18.9	\$16.6

Table 1.3 Top Ten International Tourism Earners (Billion dollars)

Source: UNTWO Tourism Highlights 2010 Edition

In 2010, the World Tourism Organization also published statistics on the leading city destinations in the world (See table 1.4).

Table 1.4 Most Visited Cities

City	Country	International visitors (millions)	Year
Paris	France	14.8	2009
London	United Kingdom	14.1	2009
Singapore	Singapore	9.7	2009
Kuala Lumpur	Malaysia	9.11	2009
Hong Kong	China	8.95	2009
New York City	United States	8.7	2009
Bangkok	Thailand	8.45	2009
Istanbul	Turkey	7.51	2009
Dubai	United Arab Emirates	6.81	2009
Shanghai	China	6.29	2009

Source: UNTWO World Tourism Barometer Interim Update (April, 2010)

Table 1.4 shows the ten cities that received the most tourists in 2009. As can be seen, the leading cities were Singapore, Kuala Lumpur, Hong Kong, Bangkok and Shanghai in South East Asia, while the Middle East region had Dubai at number nine (UNWTO, 2010). Once again, no city from Sub-Saharan Africa was among the leading tourist city destinations.

Many regions and, indeed countries, have accepted that tourism is one of the world's largest and fastest growing industries. As a result, they now treat it as an integral part of their economic development. However, the situation in Sub-Saharan Africa is a far cry from that which has been described above. According to Hudman and Jackson (2002), Sub-Saharan Africa has remained the least traveled region in the world. Consequently, its share of the world tourism market is very small proportionate to its geographical and demographical size. It is, therefore, pertinent to investigate this state of affairs (UNWTO, 2013). The main objective of this paper, therefore, was to identify the factors that accounted for the overall lack of a strong tourist industry in Sub-Saharan Africa. Specifically, the study analyzed the Sub-Saharan situation against the following variables that are universally regarded as fundamental to the growth and development of a viable tourism industry:

- Location of the destination;
- Accessibility;
- Climatic conditions;
- Attractions, infrastructure, facilities and services; and,
- The image of Sub-Saharan Africa as a tourist destination area.

Literature Review: Factors That Influence Tourism Demand

According to Shaw and Williams (2002), the tourism industry is strongly influenced by a number of both internal and external factors. Among the external factors are location, climate, accessibility, attractions, infrastructure, facilities and services. It is important also to recognize that tourism is a very sensitive industry that responds to economic, social, environmental and political changes as well as to relationships between consumers and producers in a destination area (Shaw and Williams, 2002).

Location

According to Bhatia (2006), the distance from tourist generating countries is an important factor of influence in determining tourists' choices of destinations. Longer distances cost more on travel as compared to shorter distances. For example, the farther away a country's location is from the world affluent tourist markets of North America, Europe, Japan and Australia, the lower will be the tourist flows (Vellas and Bacherel, 2005). Table 1.2 shows that Europe and North America

continue to be the main generating and receiving regions, accounting for as much as 70% and 20%, respectively, of international tourist arrivals.

The majority of international tourist movements take place between adjacent countries and destinations. For example, most tourists travel between the United States of America and Canada, while those to North Africa come from Europe due to the element of proximity (Harrison, 2002). As the distance increases, so will the financial costs and time taken to cover the journey (Burten, 2005).

Accessibility

Accessibility is the means by which a tourist can reach the area where attractions are located. There can, therefore, be very little travel if there were no links between continents, countries and within countries themselves (Bhatia, 2006). For example, if tourist attractions are located at places where no regular and direct transport is available or inadequate, the attractions become of very little value. Changes in transport technology – by land, sea or air – have speeded up travel and reduced costs (Gamble, 2004). This has contributed immensely and significantly encouraged an increase in tourism demand.

There has also been a massive growth in travel agencies and tour operators. These have contributed by selling large numbers of all-inclusive package holidays at relatively low costs (Burten, 2005).. As a result, there has been a “virtuous circle” – at least in economic terms – of falling real costs, rising demand, and scale economies (Shaw and Williams, 2002). It is, therefore, important to recognize that adequate, direct and efficient links between countries, as well as comfortable and inexpensive means of connectivity are critical to the sustainable growth and development of a thriving tourism industry.

Climate

Contrasts in climatic and weather conditions are some of most crucial factors in influencing tourism travel patterns and trends world-wide. For example, millions of tourists from countries with extreme climates often visit beaches in search of the three ‘Ss’ – the sun, sea and sand. In Europe, the Mediterranean region, especially its coastal zone, is the most favored tourist destination in Western Europe.

According to Brunt (2007), a survey found that 82% of tourists confessed that climate was their chief reason for holidaying in the Mediterranean coast. The unpredictable weather over much of North-Western Europe encourages those

people who seek sunshine and warmth to look to the Mediterranean and its distinctive climate of hot and dry summers, with some twenty hours of sunshine daily during the peak holiday months of July and August (Gilmour, 2007). Many of the resorts in Mexico, the Pacific and California, Florida, and Hawaiian Islands are other examples where weather has played a prominent role in attracting tourists. Similarly, beaches of India, Sri Lanka, Thailand, Indonesia, and Australia are yet other examples of what good weather can do (Bhatia, 2006).

On the positive side, some destinations with cold winters have become important centers of attraction for a variety of winter sports. In Switzerland, for example, the Alps have a major influence on climate where depths of snow of 3 to 10 meters are not uncommon in the higher Alps (Shaw and Williams, 2002).

In destinations with tropical climates, however, temperatures can be very hot, wet and humid throughout the year. The combination of heat and humidity often attracts disease vectors such as mosquitoes, tsetse fly, etc. As a result, tourists tend to shun these places.

Attractions

A tourism destination is not just any other place. According to Youell (1997), to be an attractive and viable tourism destination, a place must offer a diverse package of products to the tourist. The products may include, but not limited to natural attractions such as sunshine, landforms, wildlife, and scenic beauty, as well as human-made attractions like historical monuments, museums, art galleries, sporting facilities, etc (Cooper et al., 1998). Although interests and tastes vary from one tourist to another, unless some form of attraction is present, tourists may not be motivated to visit a particular destination.

Accommodation

Accommodation is regarded as very basic to tourism. The World Tourism Organization (UNWTO) (2000) has submitted that, to qualify as a tourist, a traveler must spend at least one night in the destination area. This presupposes the availability of some form of accommodation. The range and type of accommodation is necessary in order to meet the needs, tastes and abilities of different tourists.

In a way, we can say that accommodation is in itself an important tourist attraction. In fact, some countries have gained reputation as worthy tourism destinations due

to their provision of excellent accommodation, cuisine, facilities and services (Cooper et al., 1998).

Destination Image

The image of a tourism destination is the sum of beliefs, ideas and impressions that a traveler has regarding a tourist destination. According to Mpofu (2009a), buying a holiday is a high-risk decision. This is because the tourism industry is a highly sensitive sector that involves the movement of live humans, not goods or commodities. Shaw and Williams (2002) have also stated that tourism is an industry that does not only respond to the presence of unique attractions but, also, to relationships between tourists and destination areas; or consumers and producers of tourist experience

While tourists may vary in type and taste, they are all influenced by images of and activities at destination areas. According to the World Tourism Organization (1979), quoted in Cooper et al. (1998:25), image making is “the ideas and conceptions held individually or collectively of a destination”. Hence most people will always consider their security first before venturing to a destination whose security is suspect (Mpofu, 2009b). This is a basic tenet and natural reaction of most normal human beings.

Research Methodology

The research was based primarily on secondary data sources. These included the World Tourism Organization (UNWTO), World Travel and Tourism Council, United Nations World Tourism Barometer and the Regional Tourism Organization of Southern Africa (RETOSA) that compile annual reports as well as world tourism rankings, and are released three times a year. In these reports, data for the world’s top tourist destinations are ranked by number of visits, revenue generated and employment created.

Results and Discussion

Tourist Arrivals in Sub-Saharan Africa

The study confirmed that Sub-Saharan Africa is the least traveled tourism region in the world and that, with the exception of East and Southern Africa, travel to this region has been declining. Table 1.5 below shows the trends in tourist arrivals in different countries of Sub-Saharan Africa, during 1990, 1995, 1998 and 2008.

Table 1.5 Top Seventeen Tourism Destinations in Sub-Saharan Africa

1990	1995	1998	Country	Arrivals (000)	2008 Arrivals (000)
4	1	1	South Africa	5,981	9,500
2	2	2	Zimbabwe	1,600	-
1	3	3	Kenya	1,062	-
6	4	4	Botswana	740	2,100
5	5	5	Nigeria	640	-
7	6	6	Mauritius	558	-
3	7	7	Namibia	560	-
	8	8	Tanzania	447	-
13	9	9	Eritrea	414	-
8	10	10	Zambia	362	800

Source: World Tourism Organization, 2009)

In 1997, the whole of Africa received less than 23 million tourists or 6.1% of the global arrivals. In 1998, out of 625 million international tourists, Africa received less than 25 million arrivals or less than 8% of the global tourist trips. In 2008, no Sub-Saharan African country featured among the top 20 destinations of the world. Although South Africa was the highest ranked country from this sub-region, it occupied position twenty-five and had a mere 9.5 million arrivals.

In 2006, only *one* Sub-Sahara city, Cape Town, featured among the top 150 city destinations of the world, thus further confirming the position of Sub-Saharan Africa as the least traveled region in the world (UNWTO, 2009).

Tourism Receipts

Similarly, out of a world income of about US\$445 billion generated by 625 million international tourists in 1998, Africa's share was only 5.9% or US\$10 billion (UNWTO, 2000). Although there was an increase in terms of both tourist arrivals and receipts, these were still very negligible compared to other regions of the world.

In 2008, South Africa increased its share of arrivals from 5.981 million in 1998 to 9.5 million, Botswana from .74 million to 2.1 million, Mauritius to 0.9 million, Uganda to 0.8 million, Zambia to 0.8 million and Swaziland to 0.7 million. However,

this was still lower than the lowest Asian country, Macau, which received 12.9 million arrivals.

Factors that Hinder Tourism Growth and Development in Sub-Saharan Africa

The study identified a number of factors that accounted for the overall lack of a strong tourist industry in Sub-Saharan Africa. Among these factors were *physical* characteristics in the form of the size of the sub-region, location, landforms and climate. The study also identified *human-related* factors such as poverty, inadequate infrastructural development, poor governance and the negative image of the sub-region.

Size and Location of the Sub-continent

The part of Africa south of the Sahara is a large area, totaling approximately nine million square miles or roughly three times the size of the United States of America (Hudman and Jackson, 2003). The sheer size of this landmass, coupled with its location, has tended to isolate Sub-Saharan Africa from the rest of the world. The long distance, together with poor connectivity, has further added to the isolation of the sub-continent from the major tourist supply regions of the world, particularly North America and Europe (Euro-monitor International, 2008).

Inaccessibility

Although there is direct connectivity into some of the countries such as Kenya, South Africa, Tanzania and Zimbabwe, transportation for the rest of the sub-region is generally poor and infrequent. In some cases, little or no air travel connections exist, thus making travel to and from the world tourist markets extremely difficult, nonexistent or circuitous at best (Hudman and Jackson, 2003). About two months ago, a Zimbabwe soccer team travelling to Egypt had to fly through Dubai in the Arab Emirates. In contrast, North African countries, particularly Egypt, Tunisia and Morocco, have benefited immensely from their proximity to Europe.

Landform Barriers

Access into the interior of Sub-Saharan Africa is further affected by various landforms. Most of Africa lies at elevations of 650 feet to 6,500 feet above sea level, with low lands forming a very small area of the sub-continent. Most landforms in Sub-Saharan Africa consist of relatively level plateaus, with sharp escarpments where they descend to the narrow coastal area. The escarpments have created several rapids and water falls (*cataracts*) a short distance up the rivers from the coast. The rapids include the famous Victoria Falls, Devil's Cataract, Main Falls,

Horseshoe Falls, Rainbow Falls and Eastern Cataract on the Zambezi River. They range in height from 61 meters to 108 meters (Nolting, 2002). Access to and from the sea is further handicapped by the absence of natural harbors along the coast, sandbars across the mouths of some rivers, and reeds along the tropical coasts. The cumulative effect of these landforms is that they hinder the development of transport and communication, thus effectively preventing access into the interior.

Harsh Climates

Africa, generally, has a climate that is characterized by too much, too little, or poorly timed precipitation (Nolting, 2002). The study established that the location of almost all of the sub-continent within 30 degrees of the Equator resulted in the study area being warm or hot. In consequence, tourism growth and development are generally affected in some parts of the sub-region. For example, because of its location centered on the Equator, the Congo Basin is a typical example of an area with year-round high temperatures and precipitation. The study established that day time temperatures averaged between 30 and 40 degrees C. (Gamble, 2004). These hot and wet conditions were often associated with poor tourism development due to a variety of diseases such as malaria and sleeping sickness.

North and south of the tropical savanna lands is a transition zone of steppe climate. This zone has been the focus of world attention because of recurring droughts, poverty and related human suffering (Hudman and Jackson, 2003). Thus, it is not one of the places to which large numbers of international tourists would be attracted.

However, the study noted that there were exceptions to this norm. For example, the mountains and highlands of the Rift Zone of East Africa as well as most countries of Southern Africa attracted a significant number of world tourists. From between ten and fifteen to twenty-five degrees north and south of the Equator are found the savanna climates that are hot and rainy for half of the year and dry during the other half (Gamble, 2004). This climate, with its tall grasslands extending from northern Nigeria, through Sudan to Kenya, is home to great herds of wild animals, making it a major tourist destination area.

In the southern zone of the savanna lie Botswana, Zambia, and Zimbabwe, with portions extending to southern Angola, Namibia and South Africa. Like its counterpart in the north, this region has suffered from occasional environmental problems such as drought and the presence of Kgalahadi Desert. The desert is characterized by temperature extremes, limited precipitation, and isolated settlements. However, because of the presence of large heads of wildlife, the harsh climate has not been an impediment to the sustained growth and development of the tourism industry (Nolting, 2002).

Poverty

As stated above, Africa is a huge mass of land that is characterized by under-development, low per capita incomes and wide spread poverty. Low literacy rates, high birth and death rates, high infant mortality, and the predominance of rural village residence are some of the indicators of lack of under-development (Gamble, 2004). Because most of the Sub-Sahara African countries are poor, they have a difficult time trying to finance development of tourism infrastructure, facilities and services. In addition, development funds have not been forthcoming from both local and international sources for tourism development.

For example, the largest game reserve in Africa, the Selous in Tanzania, is largely unexploited and unexplored because of its inaccessibility. Access by road is difficult, particularly during the rainy season. Some tourists have even tried to explore the Selous Game Reserve by using raft or boat, only to be confronted by the rapids of Stiegler's Gorge on the Rufiji River (Nolting, 2002).

Similarly, Ethiopia is among the countries of Sub-Saharan Africa with an enormous potential for tourism. However, the current growth in tourist arrivals and expenditure has hardly been transformed into income, compared with Ethiopia's East African neighbors, particularly Kenya, Tanzania and Uganda. The study revealed that Ethiopia's tourism industry ranked 110 in absolute terms, 105 in relative contribution to the national economy and 143 in long-term (10-year) growth (The Ethiopian Tribunal, 2011).

The study also found that, in 2008, Ethiopia's real GDP growth in travel and tourism was only 4.2%, contrary to the previous estimates made in 2006 that Ethiopian tourism would account for, at least, 9.2% of the Gross Domestic Product (GDP) and 7.1% of total employment (Ethiopia's Plan for Accelerated and Sustained Development to End Poverty (MoFED, 2006).

Among the major constraining factors are the inadequate infrastructures for development in general and for the travel and tourism industry in particular, including the limited capacity of transport as well as other tourist facilities such as hotel rooms (MoFED, 2006).

Poor Governance

The study found that most countries of Sub-Sahara Africa are not perceived as safe tourism destinations by a number of tourist generating countries. This is because most countries of this sub-region have, for different durations, taken turns in portraying images that are not particularly attractive to the traveling public. For

example, the political unrests, violence and general breakdown in the rule of law in Angola, Chad, the Democratic Republic of Congo, Guinea, Ivory Coast, Kenya, Liberia, Madagascar, Nigeria, Sierra Leone, Somalia, South Africa, Sudan, Zimbabwe, etc. have, at one period or another, had a discouraging effect on the international tourism market (Gamble, 2004).

When Zimbabwe was the second most popular destination in the Sub-Saharan region, its travel and tourism industry was among its top foreign exchange earners. However, as its tourism star began to wane, a cocktail of political violence, instability and an economic meltdown left the once-booming tourism industry facing ruin. This was further fuelled by negative publicity that the country continued to receive due to violence and political instability (Mpofu, 2009). The highest decrease in the number of tourist arrivals was from the traditional source markets, such as the United Kingdom (UK), the United States of America (USA) and the Austral region of Australia and New Zealand.

Ethiopia is another example of a Sub-Saharan country whose travel and tourism industry is continuously affected by its past image whereby it is perceived by the global community as a country of drought, famine, and wars (MoFED, 2006). The exaggerated reports about the prevalence of diseases such as HIV/AIDS, malaria, yellow fever and cholera are also compounding the bad image of Sub-Saharan Africa, thereby limiting the number of international tourists coming into the sub-region (Euro-monitor International, 2010).

Conclusion

The conclusion of the study is that the performance of the tourism industry in Sub-Saharan Africa could be better. While factors such as size of the continent, climate, landforms, and distance from world tourist suppliers may have had influence, the study does not regard them as being particularly critical. If, indeed, distance were a critical factor, South Africa, which lies at the southern tip of the continent, would not be one of the top tourist destinations in the world. Similarly, experience has shown that climatic conditions have not deterred tourists from visiting the hot and wet Caribbean islands. Furthermore, landforms like the Andes, Alps, and Himalayas are among the popular attractions of the world while cataracts are very popular for rafting.

In this regard, therefore, the conclusion of the study is that the major limiting factor is the inadequately and poorly developed tourism infrastructure which, in turn, results in both external and internal inaccessibility of the sub-region. The

poor development of infrastructure, particularly attractions, transportation and communication linkages, is attributed to the general poverty of the sub-region as well as the poor inflow of development funds from international sources.

Another critical conclusion of the study is that, in general, Sub-Saharan Africa suffers from a negative image. Most tourist supply markets perceive the sub-region as suffering from poor governance, instability, lawlessness, insecurity, and political violence. The situation is compounded by lack of comprehensive and aggressive marketing strategies as well as adequate budgets to counter these negative perceptions, particularly among priority tourist markets.

It is important to note, however, that no single factor operates in isolation. An image of any tourism destination, whether positive or negative, is a function of an inter-play of a number of factors. Even if a country has the best tourist attractions in the world, if tourists feel insecure, they will consciously decide to spend the hard-won money somewhere else.

Recommendations

Against this background, Sub-Saharan governments should embark on fundamental changes in the political governance of their countries. This is necessary in order to improve and rebuild the mangled international image of most countries in the sub-region. This is because tourism is a very sensitive industry. Thus, a tourist destination image has become so catholic that it is at the centre of all beliefs, impressions and choices that tourists make about their travels.

The miraculous rise of South African tourism from virtual oblivion to the best in the sub-region is testimony enough that negative perceptions can be reversed. Similarly, Kenya's dramatic recovery from the losses occasioned by the post-poll chaos of January 2008 is another instructive example that, through good governance and strategic marketing, negative perceptions can be changed, if not reversed.

Finally, the study recommends that countries of Sub-Saharan Africa should develop comprehensive, if not aggressive marketing strategies to counter the bad image they are associated with. In tourism, perceptions matter! This is regardless of whether they are grounded in truth or not; they do inform tourist destination choices.

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