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**The West Africa Tourism Report 2021**  
on the West Africa Tourism Roundtable Series





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**“Tourism in West Africa has to be government-led, private-sector driven, and community-based.”**

Kojo Bentum-Williams



## About Us

Red Clay is a specialist tourism advisory practice focused on tourism development in West Africa. Our core services to the tourism, leisure and recreation sectors are in the areas of tourism strategy, policy advice and guidance, destination development and destination management. We also carry out commissioned market research, feasibility studies, and can provide implementation support and other associated services.

Our team members have worked in the tourism industry in the United Kingdom and Africa and are experienced and passionate about sustainable tourism as an instrument for societal change, with its promotion of heritage, celebration of culture, and contribution to identity.

# Acknowledgements

Our West Africa Tourism Roundtable Series provided the opportunity to interrogate key themes that are pivotal for the development of the hospitality and tourism industry in West Africa. We thank members of the Red Clay team and our event partner Radisson Blu Anchorage, Victoria Island for supporting our vision and working with us to ensure the hybrid format of the sessions worked seamlessly.

A special thank you to our speakers for contributing their time and expertise to moving the tourism agenda forward in West Africa:

1. Anita Mendiratta, Special Adviser to the Secretary-General, UNWTO
2. Dr Belinda Nwosu, Lecturer, Lagos Business School, Pan-Atlantic University
3. Brian Efa, Executive Director & Chief Financial Officer, Celsius Hotels and Resorts
4. Damilola Sobo Smith, Environmental and Social Sustainability Specialist, IFC
5. Daniel Gray Mwanza, African Council for Trade, Tourism & Investment (AfCOTTI)
6. Joel Omeike, Business Growth and Transformation Consultant. Founder/Lead Consultant, P4PE
7. Kojo Bentum-Williams, Senior Expert on Communications in Africa, UNWTO
8. Moyo Ogunseinde, Executive Director, Uruga Real Estate Limited
9. Olivia Ruggles-Brise, Sustainability Strategy Consultant and Director, Greenview
10. Paul Onwuanibe, CEO and Founder, Landmark Africa
11. Sirili Akko, CEO, Tanzania Association of Tour Operators
12. Dr Tagbo Azubike, International Healthcare Management Consultant





Finally, we thank all our roundtable participants for attending the sessions and contributing to the discussions. Thank you for your commitment and passion for the industry. We look forward to working with you to implement the findings from the roundtable sessions.



# Foreword

The decision to host a series of roundtable sessions in 2021 arose out of the need to create a platform for knowledge sharing, innovation and collaboration for practitioners and professionals within and outside of the tourism industry. For the tourism roundtable sessions, we were able to bring together various leaders and experts from across several sectors and industries to present multiple perspectives around the most critical issues currently affecting the tourism industry with a solution-oriented focus on the possibilities for sustainable tourism development across the 15 Western Africa countries. The roundtable discussion format helped to achieve this.

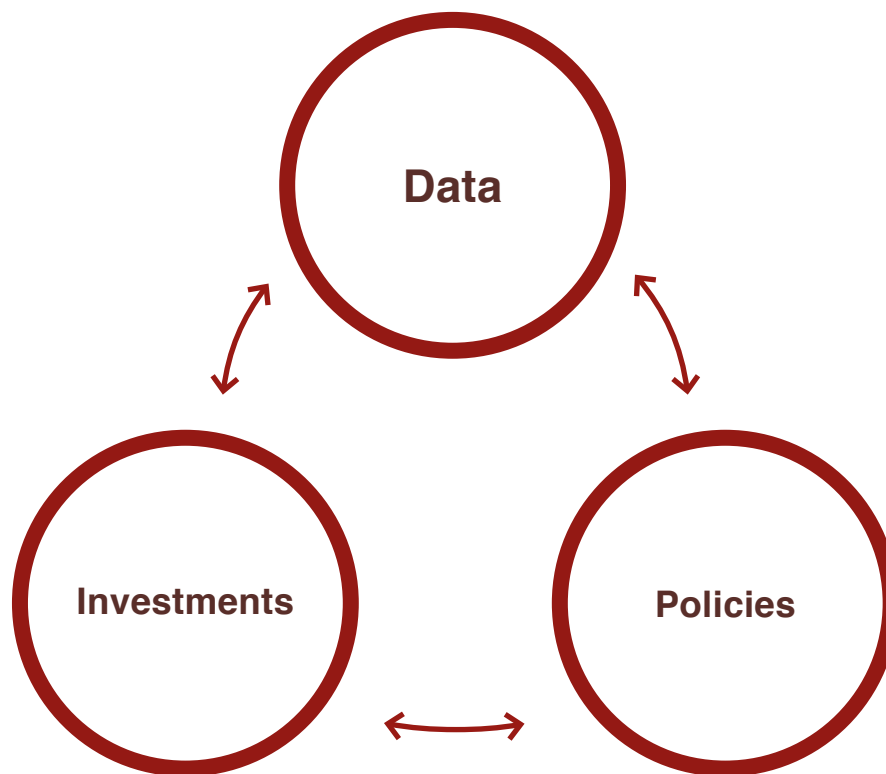
The four sessions addressed critical issues facing the global tourism industry, adapted to the West African context:

How to build a vibrant domestic and regional hospitality and tourism industry;

- health, safety and security for destination competitiveness;
- tourism entrepreneurship and service quality;
- the African Continental Free Trade Agreement (AfCFTA);
- online and offline safety for tourists,
- human resource management and talent required for growth in our dynamic industry and;
- the role of sustainability thinking in tourism development.

I am glad that the platform for engaged contributions has been created.

Interestingly but perhaps unsurprisingly, the roundtable discussions returned to the need for accurate data, the need for an enabling environment for businesses, and long-term investments for destination development and human capital development. These are interconnected, and the most critical of these is data. Data informs decision-making for policymakers, investors and practitioners. Data drives engagement within the industry and our aim of attracting the best minds to work in our industry requires evidence to show that the industry is well-placed to provide a rich and varied career path. Suffice to say that without the insights from data, our industry will not be able to meet its much-anticipated potential.



Our work has only just begun and as an organization, we remain committed to advancing sustainable tourism development in Africa. We are streamlining our focus areas for 2022 to ensure that the platform for knowledge sharing, innovation and collaboration established in 2021 leads to tangible results. This is why we are launching the ATRA initiative to Advance Tourism Research in Africa which aims to build upon the roundtable sessions and focus on areas with catalytic impact.

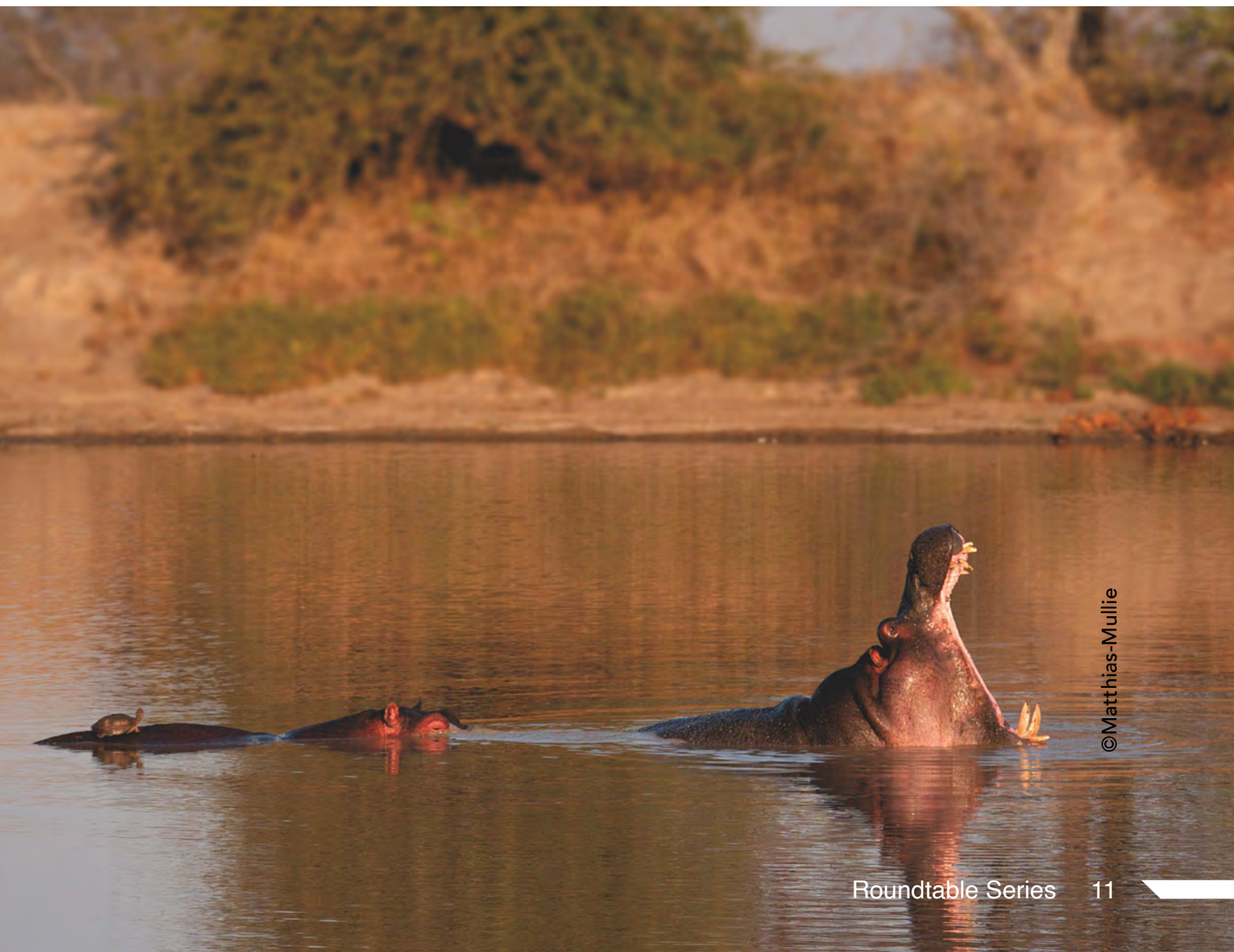
We cannot do it alone and as always, we look forward to working with you to make this a reality



**Dr Adun Okupe**  
**Senior Advisor, Red Clay**

# Abbreviations

<b>AfCFTA</b>	Africa Continental Free Trade Area
<b>ATRA</b>	Advancing Tourism Research in Africa
<b>HSS</b>	Health, Safety and Security
<b>TTCI</b>	Travel and Tourism Competitiveness Index
<b>WEF</b>	World Economic Forum
<b>WTTC</b>	World Travel and Tourism Council
<b>UNWTO</b>	United Nations World Tourism Organization





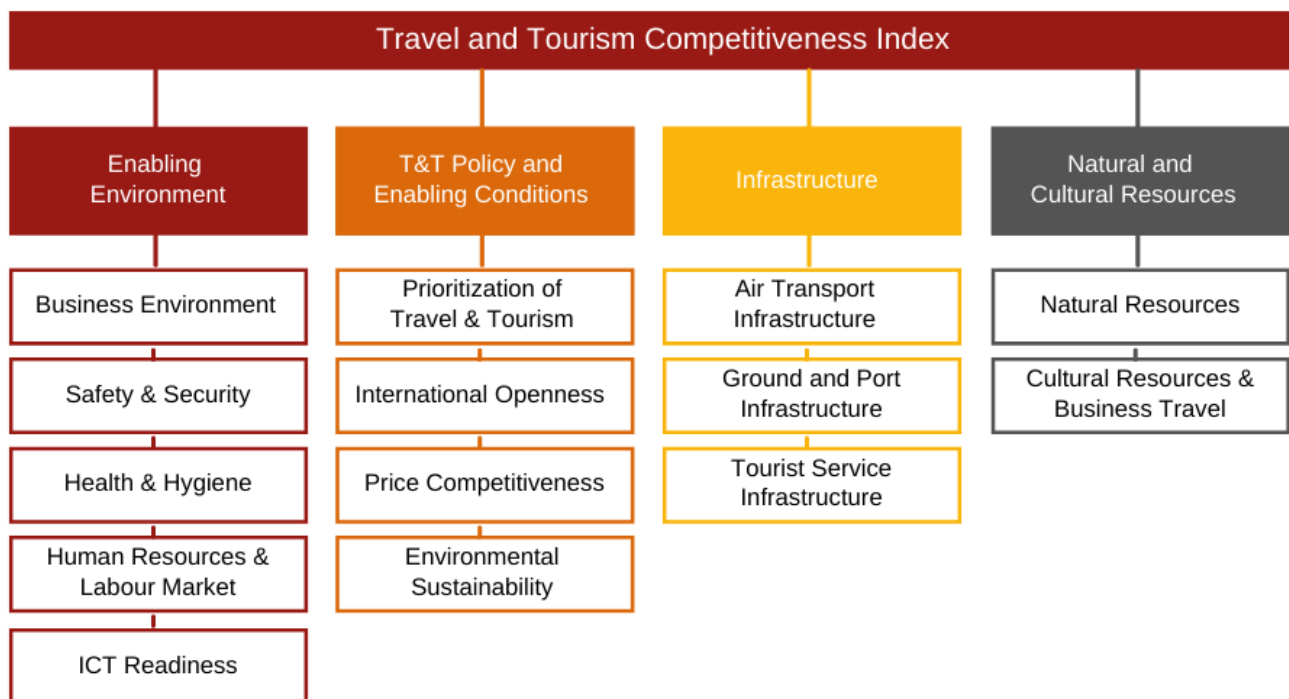




# Introduction

This report synthesizes the outcomes of the deliberations from the four roundtable sessions held in 2021. Insightful contributions were received from about 300 participants, all focused on how to grow the tourism economy in West Africa.

Tourism in West Africa lags behind East and Southern Africa in terms of the region’s contributions to the national economy, employment and visitor arrivals. Destination competitiveness, as captured by the World Economic Forum (WEF)’s Travel & Tourism Competitiveness Index is a useful way to understand and address the successes and gaps for regional tourism development. Our focus was to illuminate the findings in the index’s pillars and engage experts to identify ways to build on some of the successes while addressing critical gaps that impede on overall tourism development. The focus on West Africa provided a point through which to engage with other global tourism issues in the wake of COVID-19, but from a manageable, contextual perspective.



Pillars of the Travel & Tourism Competitiveness Index



Whilst improvements have been made in areas such as tourist services infrastructure, natural resources, cultural and business travel, information and communication technology (ICT) readiness, international openness and price competitiveness, West Africa still has key gaps in the areas of health, security, transport and tourism infrastructure, and the prioritization of travel and tourism in the region.

#### West Africa Global Travel & Tourism Competitiveness Rankings (2019)

	Country	West Africa Ranking		Global Ranking	
		2019	2017	2019	2017
1	Cape Verde	1	1	88	83
2	Senegal	2	3	106	111
3	The Gambia	3	4	111	112
4	Ghana	4	5	115	120
5	Côte d'Ivoire	5	2	119	109
6	Benin	6	7	123	127
7	Guinea	7	-	126	-
8	Cameroon	8	6	128	126
9	Nigeria	9	8	129	129
10	Mali	10	9	130	130
11	Sierra Leone	11	10	131	131
12	Burkina Faso	12	-	132	-
13	Mauritania	13	11	135	132
14	Liberia	14	-	138	-
15	Chad	15	12	139	135

Source: WEF Travel & Tourism Competitiveness Reports

Cape Verde is ranked highest in West Africa and 88th in the world, due to its investments in tourist service infrastructure and air transport infrastructure, together with a strategy for international openness, health and hygiene and price competitiveness, while Chad is the lowest-ranked country in West Africa, occupying 139th position in the world. The situation is not all dire, as the region attracts investments. West Africa is projected to have the highest number of hotels and rooms compared to Southern and East Africa - over 50 per cent of hotel developments in Africa are in West Africa alone, with about 24,000 rooms in the pipeline (W-Hospitality Pipeline Report, 2021). West African countries have similar natural and cultural resources that can contribute to a strong, collective regional network. Yet, a lack of a concerted regional tourism approach affects the growth of the regional tourism economy.

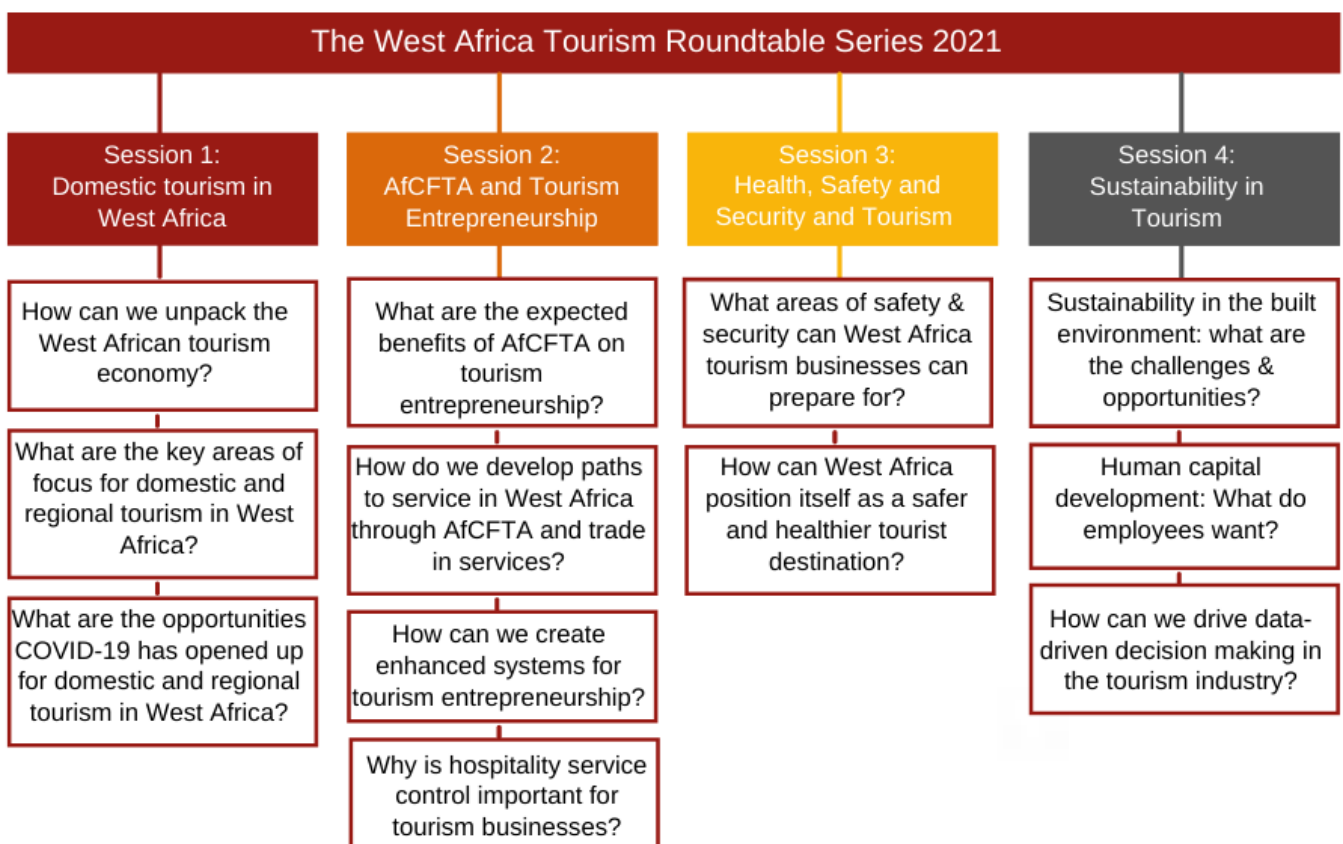
### Global Travel & Tourism Competitiveness Rankings (2019)

Pillars	West Africa Average	Sub-Saharan Africa Average	Global Average
Business Environment	4.1	4.2	4.5
Safety & Security	4.9	5.0	5.2
Health & Hygiene	3.1	3.2	5.0
Human Resources & Labor Market	3.8	3.9	4.6
ICT Readiness	3.2	3.2	4.6
Prioritization of Travel & Tourism	3.4	3.9	4.6
International Openness	2.3	2.5	3.3
Price Competitiveness	5.1	5.3	5.3
Environmental Sustainability	4.3	4.2	4.3
Air Transport Infrastructure	1.9	2.1	3.1
Ground & Port Infrastructure	2.5	2.7	3.6
Tourist Service Infrastructure	2.4	2.8	4.0
Natural Resources	2.6	2.9	3.1
Cultural Resources & Business Travel	1.2	1.3	2.2

Source: WEF Travel and Tourism Competitiveness Ranking Reports (2019)



We present the key insights from the roundtable sessions, focused on solutions required and the practical opportunities presented by these. We hope that industry colleagues are able to use the results from our discussions to inform their future strategies and position and that policymakers engage with these for the sustainable development of tourism in our region.





# Session 1

## Domestic Tourism in West Africa: Trends and Pathways to Sustainable Tourism Business Development

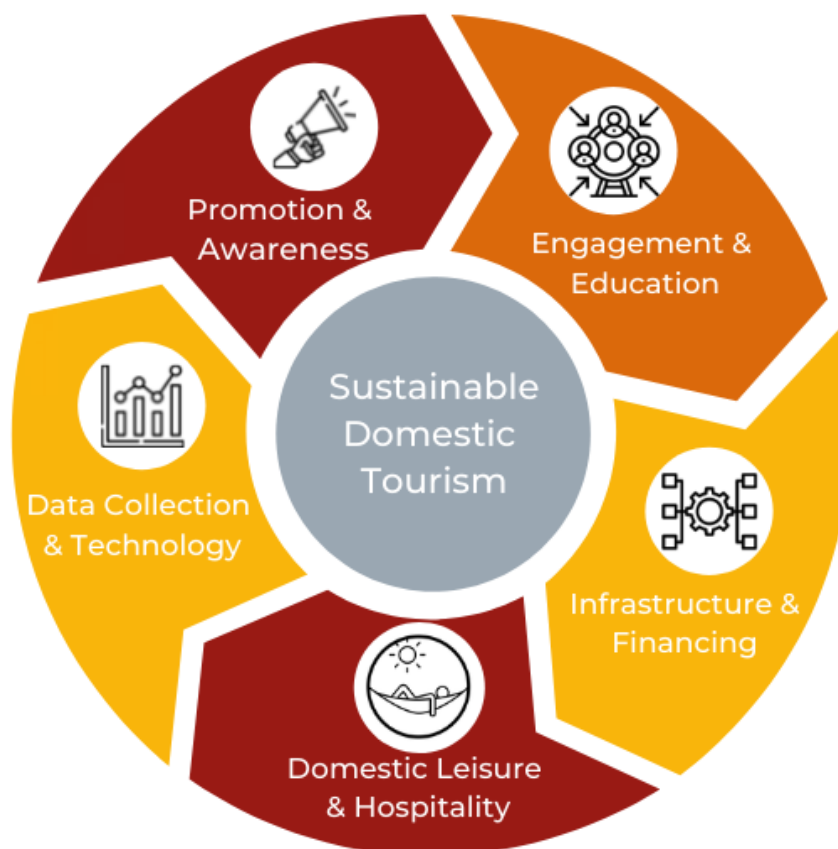


# Session 1

## Domestic Tourism in West Africa: Trends and Pathways to Sustainable Tourism Business Development

This inaugural session looked at domestic tourism in West Africa and discussed some of the key lessons from 2020, and ways to build a stronger domestic tourism economy in 2021.

As nations closed their borders to stem the spread of the COVID-19 pandemic, international tourism dropped to an all-time low of 74 per cent by the end of 2020. This presented the opportunity for domestic (within-country) tourism, and efforts were made to reposition destinations for domestic visitors.



Domestic tourism requires concerted efforts in these areas



## Where are the opportunities?

- Business travel figures fell by about 83 per cent in 2020. Recovery of this segment will be slow even as businesses save on business travel costs. This means the opportunity for domestic tourism is primarily for a business + leisure (bleisure) tourism market. This market is price-sensitive, requiring pricing strategies to attract various segments of the leisure tourism market.
- Investments to support a leisure tourism industry to develop new attractions and accommodation facilities and upgrade existing offerings as well as access networks and routes.
- West Africa's beautiful coastline remains under-developed and exposed to erosion, pollution and coasting. Investments in coastline adaptation and the development of beaches and resort facilities can preserve the coastline and sustain livelihoods in coastal areas.
- Extensive communication strategies and plans to share the benefits of leisure tourism to quality of life and to promote a culture of domestic travel.
- The service quality levels in West Africa need benchmarks to standardize acceptable service levels in West Africa and establish best practices.
- Collaboration across the various components of the tourism system, to create tourism clusters for destinations, e.g. a cluster may include airports, hotels, cab drivers, traders, host communities in destinations to work together to tackle issues, and identify ways to enhance the tourism experience.
- A change in the perception of the industry from a casual employer of entry-level workers to one which provides well-defined career paths to attract professionals into the industry.
- Tourism development in West Africa will require mid and senior-level experts across a range of professions to include law, infrastructural development, financing, brand managers and public relations experts.





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### **What needs to be done to harness these opportunities?**

- The private sector should create stronger linkages with the public sector through active engagement to drive efforts. These efforts should prioritise community-based tourism and sustainable tourism.
- Technology presents an opportunity for data collection, analysis and synthesis across tourist destinations.
- Digital platforms need to be developed and leveraged to promote destinations and travel experiences in West Africa.



## **Lessons from Eastern Africa: COVID-19 Approach**

West Africa can learn from East Africa's tourism network, which has thrived due to sustainable intra-regional cooperation and strategic collaborations between ministries and organizations. East Africa's tourism industry is driven by eco-tourism and regional safari operations, as evidenced by tourism revenue statistics from Tanzania and Kenya.

In 2019, tourism contributed 18 per cent of the national GDP (US\$US2.5bn) in Tanzania, 30 per cent of export earnings, 10 per cent of total investments and 12.2 per cent of direct and indirect employment. In the same year, there were 720,000 annual tourist arrivals from African countries, 634,000 (over 80 per cent) were arrivals from within East Africa, highlighting the seamless and free movement of persons for trade, travel, and tourism that exists within the East Africa sub-region.

The resilience and cooperation of the East African Community (EAC) led to the creation and successful implementation of several initiatives to add tourism and economic recovery.

Some of these include strong marketing the region as a single tourism destination, promotion of EAC single tourist visa for borderless travel, and sectoral collaborations between the Ministries of Health and Tourism in training and upskilling of tour guides and other private sector professionals on developing standard procedures in line with global health and safety best practices for travel, tourism, and hospitality.

During the 2020 pandemic lockdown, travel and tourism operators in East Africa came together to decide on a collective strategy for tourism marketing. They agreed to focus on a luxury market that appreciated the opportunity to explore destinations with fewer visitors, and the focus was on the international market. Travel routes were agreed with airlines and international destination marketing was embarked upon, which led to results that sustained the tourism economy in 2020.

**Sirili Akko**  
**CEO, Tanzania Association of Tourism Operators**



# Session 2

## AfCFTA and Tourism Entrepreneurship in West Africa: Lessons from the Field

# Session 2

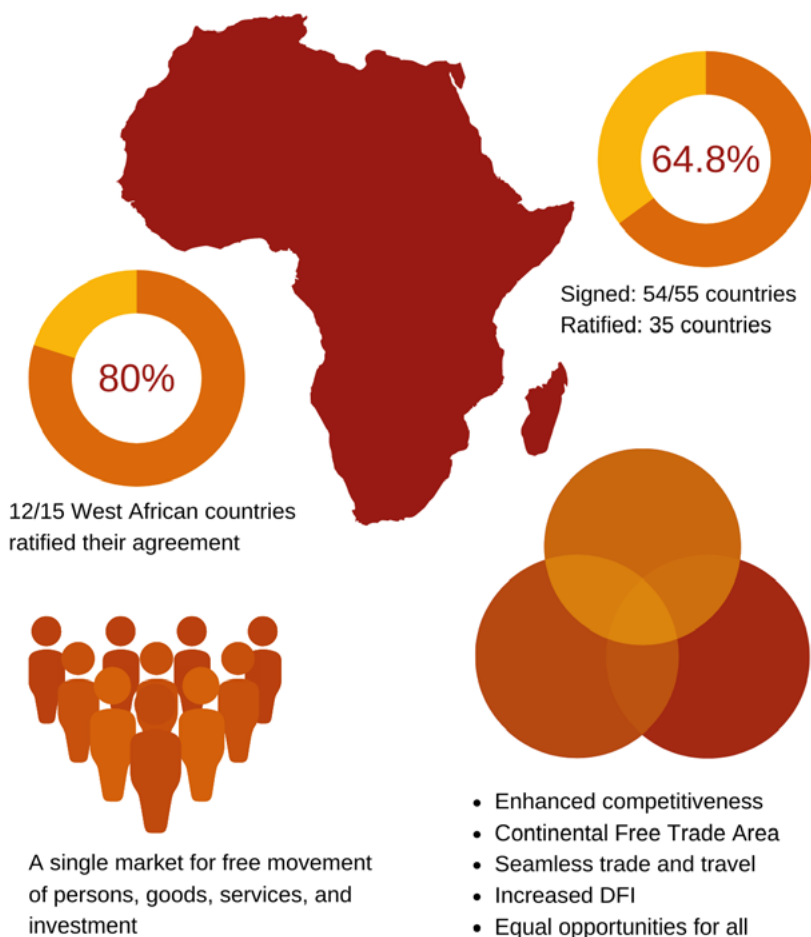
## AfCFTA and Tourism Entrepreneurship in West Africa: Lessons from the Field

The African Continental Free Trade Area (AfCFTA) commenced on 1 January 2021. AfCFTA is expected to lead to a stronger African economy driven by inclusive growth, seamless intra-African trade and value addition on the continent. The goals of AfCFTA revolve around creating a single market for the free movement of persons, goods, services, and investment for enhanced competitiveness. Since its inception, 54 of the African Union's (AU) 55 member States have signed the agreement - with the exception of Eritrea - while 35 countries have further gone ahead to ratify the agreement, with 12 West African countries formalizing their ratification. These countries are Burkina Faso, Côte d'Ivoire, Gambia, Ghana, Guinea, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, and Togo.

### About AfCFTA: Origin, Goal and Objectives

#### Key Facts:

- African Continental Free Trade Area
- Became operational in January 2021
- Seamless and borderless trade facilitation
- Opportunities for trade, travel and tourism



Reviewing the detailed agreement, there are certain questions on how it will directly benefit the service-oriented tourism industry given its fragmented nature consisting mainly of micro, small and medium-sized enterprises, most of whom operate in the informal economy. We identified three interrelated areas for the roundtable session - the AfCFTA agreement, regional tourism networks and improvement in service quality for the tourism and hospitality industries to be more competitive. Certain gaps exist due to social, economic, cultural, political and legislative differences across ECOWAS member countries, and a lack of coordinated and cohesive efforts from key stakeholders.

West African countries are at different stages in their tourism development trajectory, which affects their inputs into the single free-market agreement. Engaging in exchange programs on tourism and human capacity development with the more experienced Eastern and Southern African countries can provide avenues for the adaptation of well-proven solutions to local Western African contexts.

West Africa	East Africa
<ul style="list-style-type: none"> <li>• Weak regional networks for tourism development</li> <li>• Weak regional tourism collaborations</li> <li>• Lack of strong regional tourism framework, regional tourism branding and marketing</li> <li>• Undefined regional tourism market focus</li> <li>• Fragmented industries</li> <li>• Low service quality levels</li> <li>• Lack of access to funding and investments from the public and private sector to address industry challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Clear tourism market focus: safari and ecotourism</li> <li>• Supported by sustainable wildlife conservation practices</li> <li>• Strong tourism networks</li> <li>• High service quality levels</li> <li>• Strong regional cooperation - the EAC - East African Community - is the most integrated bloc on the continent</li> <li>• Strategic collaborations between ministries and tourism organizations</li> <li>• COVID-19 recovery activities included strong regional tourism branding and investments in tourism marketing</li> <li>• MSMEs have access to public and public funding</li> </ul>



## Where are the opportunities?

- AfCFTA can contribute to direct and increased economic impact for SMEs and contribute to the tourism economy
- AfCFTA will lead to growing regional competition and winning destinations will be those that provide value and the quality of service offerings.
- Service quality levels in the hospitality and tourism industry in West Africa need to be benchmarked and improved to justify future investments in the economy.
- Service quality requires attracting the right people into the industry, and this will need a complete overhaul of the recruitment and selection of staff.
- Standardization and harmonization of tourism products, services, and structures across West Africa.
- AfCFTA presents the opportunity for West Africa to engage in exchange programmes to learn from Eastern and Southern Africa's tourism development experiences
- AfCFTA presents access to tourism financing: funding, grants and investments There is a need for more aggregation within the private sector and strategic collaborations between sectors.
- The increase in hotel developments, disposable income levels will drive demand for higher service quality levels.
- Workplace sustainability will need to come to the fore with investments in education and training opportunities and the provision of a harmonious working environment for employees.
- Concerted efforts are required to change societal perceptions on the concept of service and work ethic.
- Professional certification bodies for the various sub-sectors to provide training and continuing professional development.
- Higher up the scale, supervisory and middle management also need to be equipped with strategic thinking, leadership, and management skills to be better tourism leaders and contribute to the development of the industry.

### What needs to be done to harness these opportunities?

- The industry needs a systems approach to tourism development. This requires strategic enlightenment and capacity building across regional, national and local levels in the public, private and third sectors to facilitate understanding of tourism, the value chain and the financial contributions to the economy.
- Intensive human capital development for entry and mid-level colleagues to ensure that development efforts are sustainable.
- The regulatory environments should encourage tourism entrepreneurship.
- Leverage the power of digital technology and social media to counter negative media perception and present a positive image of West Africa.
- Incentivise entrepreneurial and digital-savvy youth to be part of the re-branding agenda to improve destination competitiveness.
- Aggressive marketing of regional tourism products and services, to domestic and international audiences.
- Advocacy to simplify the bureaucratic immigration policies for nationals from non-ECOWAS countries which will contribute to an increase in tourist arrivals and enhanced visitor experiences.
- Creation of a collaborative regional tourism framework to provide a collective approach to tourism development.





2020 was ground zero in terms of the global reset. The ‘business as usual’ mantra hit a brick wall. What we were familiar with became harder to sustain. 2021 was the year that determined who would continue the march into a post-pandemic era and who would inevitably fade away. We can refer to 2021 as the start of the new reality. So, what happened in 2021 to improve service quality in the tourism sector? One significant game-changer was the raised bar in terms of service responsiveness. The shift to online commerce meant that service businesses that wanted to remain relevant needed to identify customers, reach out to them, deliver their services seamlessly and without delay. Service took on a new hue by favouring early adopters and being less forgiving of the laggards. Today, tourism entrepreneurs and businesses use every conceivable social media platform to attract more patronage and keep their existing customers constantly engaged. In a way, the COVID-19 pandemic accelerated for Africa what AfCFTA was designed to facilitate. That is, reinforcing the notion of borderless boundaries. No more is the standard of service quality limited to the context in which one operates. These standards are now measured on a global scale. So, what would make for improved service quality for tourism entrepreneurs and businesses in 2022? I envisage that those who keep abreast of the newer and more efficient online technologies will have an advantage. As the competition becomes fiercer, there is a need to differentiate service delivery by getting it there quicker and better. And that’s good news for the tourism sector, as this will help create a new class of service connoisseurs.

**Dr. Belinda Nwosu FIH**

# Session 3

## Health, Safety and Security: Destination Competitiveness in West Africa



# Session 3

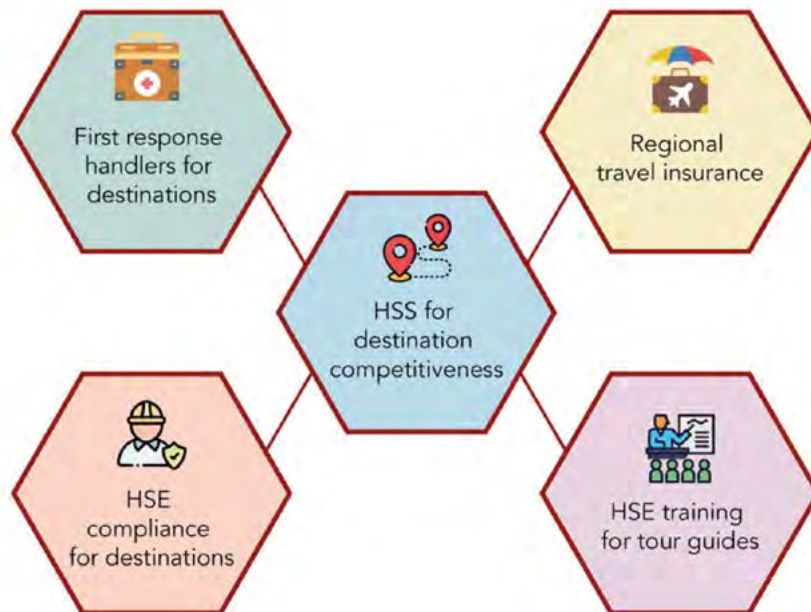
## Health, Safety and Security: Destination Competitiveness in West Africa



This session looked at the themes of health, visitor safety and security, areas identified as requiring improvement areas according to the WEF Travel & Tourism Competitiveness Index. With COVID-19, health and safety has become an even more important consideration for visitors, and as destinations work to jumpstart the recovery of tourism, these destinations will need to demonstrate steps taken to ensure visitors can access healthcare facilities, precautions for physical and online safety as well as to improve the perceived and actual security of destinations.

Safety refers to both online and offline safety. Online safety includes the flexibility of payment services, transparency, prevention of online scams and identity theft. Offline safety includes road safety, accommodation safety, transportation, handling money, hijacking and hostage situations, and natural disaster management.

For health, safety and security, perception matters. Visitors typically picture a region riddled with crime, poverty and diseases, unsafe to visit. This impression, perceived or real, impacts on tourism demand in West Africa. Perception management requires a long-term approach, although certain short-term activities can be carried out. For example, travel advice, recommendations and advisories can be prepared and actively disseminated online, in a way to control the domestic, regional and international narrative. As countries prepare to welcome more international visitors, destinations that can allay fears and portray West Africa as a safe and secure tourist destination with provisions for health emergencies stand to win.



### Where are the opportunities?

1. Medical practitioners, security experts and tourist destinations can collaborate to improve emergency readiness of hotels and destinations in terms of needs analysis and training programmes.
2. Toolkits for first response handlers for the destinations will need to be prepared, together with training programmes for first response handlers. Visitor information centres with emergency contact details across destinations will provide assurance for visitors.
3. Domestic and regional travel insurance products can be introduced and promoted for travel in West Africa. There is the opportunity for a standardized insurance product for West Africa travel. Practitioners can come together to define the product(s) and the levels of cover for affordable and flexible insurance packages.
4. All hotels and tourist destinations in West Africa should be health, safety and environment (HSE) compliant and reflect this in the use of appropriate signage and information for visitor safety and security.
5. Tour guides and frontline workers need to be HSE-trained as part of their accreditation process. Such training can include first aid training, fire prevention and crisis/disaster prevention and management techniques.
6. Host communities need to be enlightened on the direct and indirect social and economic impacts of tourism in their environment, and concerted efforts need to be made to integrate them into tourism development plans so that they get involved in making visitor experiences in their communities safe and secure.
7. Destination management companies should invest in online safety and security for visitors across all platforms, including payment and social media to ensure visitors feel safe at all points of interaction with the destinations.



### What can be done to harness these opportunities?

1. Effective information management and control systems for safe and secure travel.
2. Data protection systems designed to guide the collection, processing, and usage of data together with security measures around storage, retention and updating.
3. Education, standardization, and regulation of HSE standards for tourism businesses across West Africa.
4. Standardization of travel insurance as part of requirements for local and regional travel - medical insurance packages can be made affordable and flexible.
5. Regional tourism branding and marketing to spotlight the health, safety and security precautions in West Africa.
6. Proper and effective urban planning - siting of parks, recreational areas, and tourist destinations in safe and secure environments.
7. Inter-sectoral synergistic collaborations with health and security organizations, as well as other allied industries.
8. Storytelling to change the narrative about West Africa through the depiction of cultural strengths and values.
9. Community-wide engagement, educating communities on the direct and indirect social and economic opportunities of tourism.
10. Registration and publication of the list(s) of healthcare providers open to visitors and level(s) of service available and prices across West Africa.
11. Online portal and information throughout destinations to detail these providers for visitors
12. Central coordination of incidents for incident management, reporting and prevention.





“The tourism industry provides an opportunity for Africa to show the rest of the world what the continent has to offer, and Nigeria must come to the table. However, we must create a sustainable environment to achieve this. We need to account for the current and future economic, social, and environmental impacts, while also addressing the needs of visitors, the industry, environmental issues, and the needs of the host communities. This includes rediscovering how to use existing infrastructure socially and environmentally to recapture indoor and outdoor relationships with the use of technical values of pedestrians and mixed-use communities. Sustainability thinking for the built tourism environment presents environmentally friendly cost-saving opportunities brought about by better management of resources.”

**Paul Onwuanibe,**  
**CEO, Landmark Africa**





## Session 4

### **Sustainability in tourism:**

How can sustainability thinking become more relevant in tourism development in West Africa?

## Session 4

# Sustainability in tourism: How can sustainability thinking become more relevant in tourism development in West Africa?

Sustainability thinking presents certain opportunities for tourism development given its focus on people-centred and planet-focused approaches to the design of destinations. Practitioners in the hotel architecture, tourism urban planning, construction and real estate spaces are beginning to adopt energy-efficient, innovative and eco-friendly strategies in the design of tourism destinations.

Sustainable tourism development respects and seeks to preserve the socio-cultural authenticity of host communities, who are better able to secure and protect tourists and attractions as 'local police' within their communities when they understand that tourism development plans are cognizant and respectful of their needs. Sustainability promotes the conservation and optimal use of natural, cultural and environmental resources, and is relevant to human capital development: a long-term approach to the upskilling of entry and mid-level frontline staff through relevant training programmes that can build quality customer experience and employee responsiveness. Human resources are an essential part of tourism, and employee and customer-centric organizations that focus on best practices are more likely to retain them in the long run.

Admittedly, the world of work is changing. Successful organizations must provide a positive workplace culture with a clear path to career development and promotion, inclusiveness and diversity. Remuneration and incentives for work - benefits and performance related bonuses contribute to employee engagement and retention. Sustainability thinking requires transparency and accountability, and organizations that adhere to these will have better results for employee satisfaction, improved efficiency and productivity and the ability to make better-informed decisions.

Sustainability thinking is becoming increasingly important to tourism and hospitality investors. Environmental and social governance (ESG) considerations will affect how destinations are designed, built and managed. The metrics for performance are also changing, shifting from visitor numbers alone to include other factors such as conservation, cultural heritage protection, local supply chains and efforts to reduce carbon emissions. It is particularly important for West African destinations to consider local building techniques, tropical modern architecture and adaptation of the best green building practices to the West African context. These metrics also contribute to cost savings and sustained operations in the long run. Frameworks exist for hotel owners and managers that can monitor real-time performance.





### Where are the opportunities?

1. Talent development programmes for tourism industry practitioners across all levels, including owners and managers.
2. Sustainability programmes for tourism practitioners and related industries.
3. Adaptation of existing frameworks for measuring the performance of hotels and attractions.
4. Creation of sustainable tourism principles or framework for West Africa.

### What can be done to harness these opportunities?

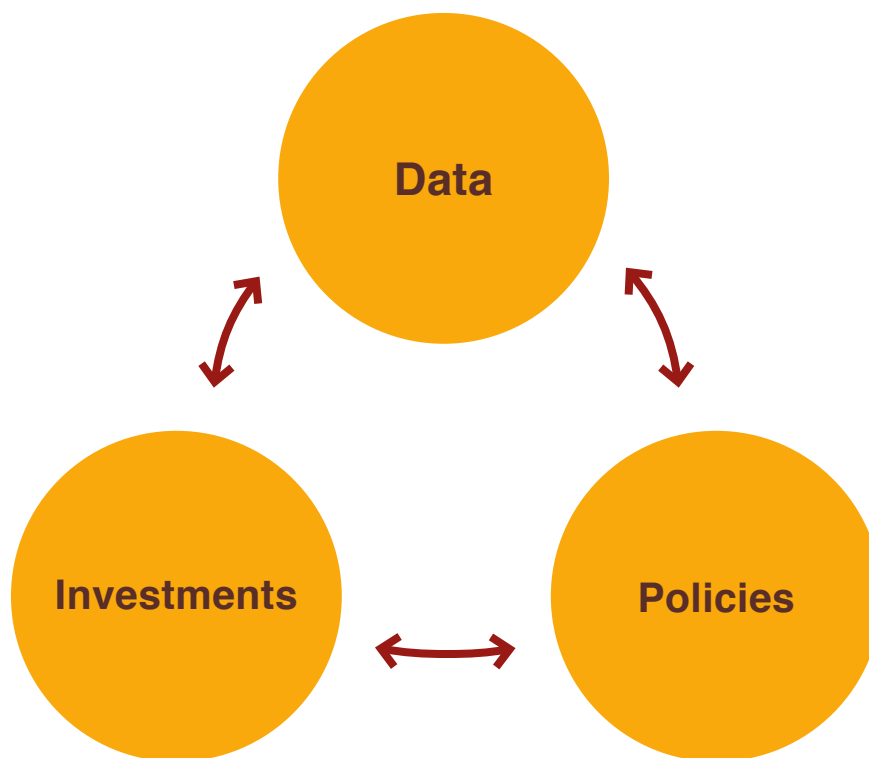
- Set-up of a visitor data collection system to be able to understand visitor preferences, profile them and predict their behaviour. This will include the development of feedback systems at visitor attractions and points of entry.
- Set-up of a private-sector driven committee to engage with policymakers and other public sector holders on sustainability policies and practices for the tourism industry.
- Regular in-depth analysis of historical data, current trends, standards and practices in the industry, to identify patterns that emerge from data to guide sustainable tourism policy making.

## The ATRA Initiative - Advancing Tourism Research in Africa

The roundtable discussions highlighted the need for more in-depth tourism research on the continent to guide policy and investment decisions. This is why we are launching the ATRA initiative that aims to understand the current research environment for the tourism industry on the continent, identifying the focus themes and areas with research gaps.

We hope that by so doing, we are able to create a strong community of tourism researchers, investors and policymakers who can contribute to the sustainable development of the industry.

ATRA: A focus on tourism research to drive tourism development through policies and investment.

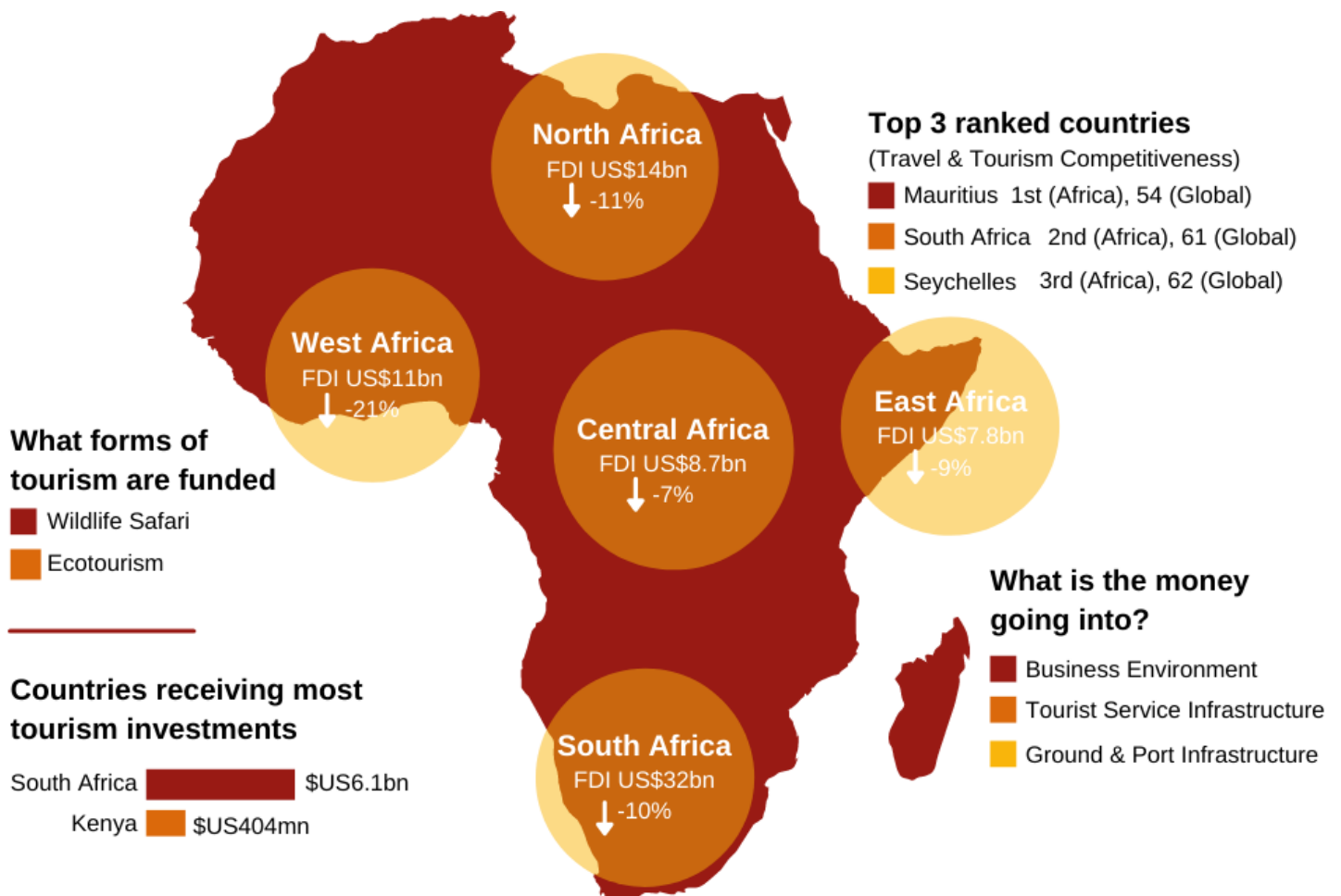


Data drives policies, which drive investments - investments can also drive policies.



## What has been the impact of tourism investment in Africa?

The following statistics reveal the state of FDI across the various sub-regions, using data from WEF and UNCTAD Reports:



## Who can be a part of the ATRA initiative?

- Tourism researchers in Africa
- Tourism researchers on Africa
- Local, national, regional and international tourism organizations
- Tourism practitioners
- Tourism policymakers

To be a part of the ATRA initiative, please send an email to [atra@redclayadvisory.com](mailto:atra@redclayadvisory.com)

## Concluding Remarks

2021 was a busy year for us and we hope to build on our efforts as a practice in 2022 and subsequent years. Some of our results in the year came as a result of earlier efforts focused on contributing to the growth of the industry. Red Clay played an instrumental part in the setting up of the Lagos State Government's COVID-19 Relief Committee for the Creative and Tourism Sector. The committee's efforts led to the disbursement of the relief fund for the creative and tourism industry in Lagos State.

We also launched the Lagos State Tour Guide Training Programme in September 2021 to train 150 tour guides in Lagos State in collaboration with the Lagos State Employment Trust Fund (LSETF) and Lagos State Ministry of Tourism, Arts and Culture.

We invited experienced tourism professionals in the industry to collaborate as co-facilitators, business mentors and coaches for the training participants to improve the knowledge, skills and competencies of tour guides in Lagos. At the end of this programme, we hope to have played our part in building high-quality, successful and recommended tour guide networks across the IBILE divisions of the state.

We will continue to use initiatives such as these to support capacity building in the tourism industry. When we pool resources together, level the playing field and welcome engagements and collaborations, the opportunities to develop the industry are limitless.

We hope that with ATRA, we can attract investments into tourism infrastructure development for the continent. It is an ambitious goal, and we look forward to working with you on this.

A unified approach to tourism development will contribute to a robust tourism network that can result in a strong and sustainable tourism economy.

Thank you.







