KEY TRENDS IN TOURISM IN AFRICA

41ST ANNUAL WORLD TOURISM CONFERENCE, KIGALI, RWANDA

CHRISTY TAWII, RESEARCH ANALYST
ABOUT EUROMONITOR INTERNATIONAL
GLOBAL OVERVIEW
AFRICA’S PERFORMANCE REVIEW
TOURISM TRENDS IN AFRICA
LOOKING AHEAD
ABOUT EUROMONITOR INTERNATIONAL

Research Coverage

12 OFFICE LOCATIONS
London, Chicago, Singapore, Shanghai, Vilnius, Santiago, Dubai, Cape Town, Tokyo, Sydney, Bangalore, and São Paulo

100 COUNTRIES
in-depth analysis on consumer goods and service industries

+ 210 COUNTRIES
demographic, macro- and socio-economic data on consumers and economies

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Extensive Consulting Project Experience in the Hospitality and Tourism Industry Worldwide

- Brand share analysis of travel related service players in the Republic of South Africa
- Intra-African Tourism Market
- Marine Hospitality Landscape Assessment in the USA
- Analysis of UK Travelers in the USA, Caribbean, Middle Eastern, African, and Asian destinations
- Competitive Profiling of Travel Providers in the USA, Australia and Greece
- Assessment of New Global Tourism Markets
- Opportunity Assessment for Inbound Tourism from Britain to Peru
- Live Entertainment Market Assessment in Latin America
- Overview of Technology Trends in the Global Hospitality Industry
- Russian Hotels Opportunity Analysis
- City-level Tourism Data in 53 Selected Cities
- Tourism in Argentina
- Inbound Tourists' Shopping in Japan
- Tourist Profile of Brazilian Outbound Travellers to Cuba
Extensive Consulting Project Experience in Sub-Saharan Africa

**IVORY COAST**
- Mayonnaise & bouillon market
- Cocoa value chain

**GHANA**
- Intra-African Tourism Market
- Impulse retail channel environment
- Cocoa value chain
- Fresh meat value chain
- Bank card segmentation

**DRC**
- Flavoured powder hot drinks
- Demand for packaged pasta

**NIGERIA**
- Intra-African Tourism Market
- Fresh produce supply chains
- Aluminium can market
- Corn grits demand analysis
- Entertainment market analysis
- Snack price partitioning
- Skin care segmentation
- Bank card segmentation

**CAMEROON**
- Intra-African Tourism Market
- Illicit alcohol
- Cocoa value chain

**LIBERIA**
- Tobacco product availability and pricing

**ANGOLA**
- Fresh produce supply chains
- Flavoured powder hot drinks
- Demand for packaged pasta
- Import partner search
- Tobacco product availability and pricing

**CONGO - BRAZZAVILLE**
- Tobacco product availability and pricing

** Botswana**
- Flavoured powder hot drinks

**ETHIOPIA**
- Tobacco product availability and pricing
- Demand for packaged pasta
- Metal can landscape

**KENYA**
- Fabric softener pricing
- Drinking yoghurt market
- Packaging markets
- Skin care segmentation

**UGANDA**
- Packaging markets

**RWANDA**
- Financial card usage

**TANZANIA**
- Packaging markets
- Private healthcare
- Illicit alcohol

**MALAWI**
- Illicit alcohol

**BURUNDI**
- Tobacco product availability and pricing

**ZAMBIA**
- Disposable nappies
- Fresh meat value chain
- Illicit alcohol
- Bank card segmentation

**ZIMBABWE**
- Tobacco product availability and pricing

**SOUTH AFRICA**
- Brand share analysis of travel related service players
- Illicit alcohol consumption
- PET machines
- Corn grits demand analysis
- Commercial refrigeration
- Analysis of financial inclusion
- Carbonate drinks business case
- Hand tools market analysis
- Cold chain logistics analysis
Travel And Tourism Continues To Remain On Track

World Inbound Arrivals, Receipts and Average Spend 2017 - 2022

Travel in 2022
- Arrivals - 1.5 billion
- Inbound receipts - USD1.4 trillion
- Average spend per trip - USD963
Value Sales For Travel Remain Positive Globally

Global Travel Product Sales USD million 2017/2022

- Lodging
- Airlines
- Attractions
- Car Rental
- Spas
- Medical Tourism

Lodging and Airlines dominate travel sales globally
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Inbound Arrivals predicted to see solid increases for the rest of 2017
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TOURISM TRENDS IN AFRICA

Tourist Inflows Pick-up Pace In The Midst Of Challenges

Inbound Arrival Trips to Sub-Saharan Africa, 2012 – 2017

*Countries include - South Africa, Kenya, Nigeria, Mozambique, Cameron, Mauritius, Tanzania – most of these countries accounts for over 70% of inbound trips to Sub-Saharan Africa region
Sources: UNWTO, Euromonitor International
Increasing Focus on Domestic Tourism Across The Region

Average domestic travel expenditure increased from U$50.9 in 2012 to U$60.6 per person in 2017.

*Countries include - South Africa, Kenya, Nigeria, Mozambique, Cameroon, Mauritius, Tanzania

Sources: Euromonitor International

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Players such as hotels, airlines and car rental companies are making use of a variety of digital platforms to engage consumers.
Travel Players Implementing Multi-Channel Approaches: Online

Online Value Sales by Category 2017

- Airlines: 67.1%
- Attractions & Activities: 25.8%
- Other Transport: 2.3%
- Lodging: 3.2%
- Car Rental: 1.6%

Sources: Euromonitor International
Entry of online players such as Airbnb is boosting online sales and shaking up the lodging industry.
Sharing Economy Gaining Traction

Peer-to-peer brands are intensifying competition as more travellers seek cheaper options.
Growing Competition Between Low Cost Carriers and Scheduled Airlines

Value Sales Split by Airline Category in Sub-Saharan Africa- 2017

Scheduled flights continued to dominate airline sales in 2017.

- **Charter**: 2.8%
- **Low Cost Carriers**: 10.1%
- **Schedule**: 87.0%
Hotels accounted for 45% of overall lodging value sales. Category is driven by the presence of international hotel chains.

Source: W Hospitality Group
TOURISM TRENDS IN AFRICA

Luxury Travel Booming

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Africa</td>
<td>15,000</td>
</tr>
<tr>
<td>Kenya</td>
<td>4,000</td>
</tr>
<tr>
<td>Zambia</td>
<td>1,000</td>
</tr>
<tr>
<td>Mauritius</td>
<td>3,000</td>
</tr>
<tr>
<td>Mozambique</td>
<td>1,000</td>
</tr>
<tr>
<td>Botswana</td>
<td>4,000</td>
</tr>
<tr>
<td>Tanzania</td>
<td>2,000</td>
</tr>
<tr>
<td>Uganda</td>
<td>1,000</td>
</tr>
<tr>
<td>Nigeria</td>
<td>1,000</td>
</tr>
</tbody>
</table>

*Sources: New World Wealth Millionaires refers to individuals with net asset of U$10 million or more

*Super Luxury vs. Luxury Accommodation Value Sales*

<table>
<thead>
<tr>
<th>Year</th>
<th>Super Luxury</th>
<th>Luxury</th>
<th>Value growth (Super Luxury)</th>
<th>Value growth (Luxury)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1.72</td>
<td>2.09</td>
<td>8.8</td>
<td>4.0</td>
</tr>
<tr>
<td>2013</td>
<td>1.87</td>
<td>2.17</td>
<td>6.2</td>
<td>4.9</td>
</tr>
<tr>
<td>2014</td>
<td>1.98</td>
<td>2.28</td>
<td>7.1</td>
<td>3.9</td>
</tr>
<tr>
<td>2015</td>
<td>2.12</td>
<td>2.37</td>
<td>8.3</td>
<td>2.6</td>
</tr>
<tr>
<td>2016</td>
<td>2.30</td>
<td>2.43</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Sources: Super Luxury refers to accommodation with 5 star or more rating; Luxury refers to accommodation with a 4 star rating*

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MICE Boosting Tourism In The Region

*Countries include - South Africa, Kenya, Nigeria, Mozambique, Cameroon, Mauritius, Tanzania – accounts for over 70% of Sub-Saharan Africa travel

Sources: UNWTO, Euromonitor International

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TOURISM TRENDS IN AFRICA

Niche Tourism

Sports Tourism  Eco-tourism  Cultural Tourism

Medical Tourism  Safari Tourism  Beach Tourism
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Positive Growth To Continue Over Forecast Period

A boom in both leisure and business trips is expected over the forecast period.

Inbound Arrivals to Sub-Saharan Africa 2018 - 2022

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Sources: UNWTO, Euromonitor International

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