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Africa's tourism industry: Survival of the fittest

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Africa's tourism industry: Survival of the fittest

Africa seemingly escaped the worst of COVID-19's impacts on health. However, its economies must endure a very hard blow. Tourism on the continent suffered enormously from the combined impact of a precipitous drop in international travel and border closures. The fiscal impact of the pandemic on the sector has been broad and deep, due to tourism's multiplier effects across sector-related service industries, and on employment.

Given the fragile state of the global economy, even the immediate reopening of international borders would not guarantee a return to earlier tourist volumes. The fear of contagion (and concerns over a second wave) deter many potential tourists from travel by air. Even development of an effective vaccine may not drive an early recovery to pre-COVID-19 tourism levels. Disposable income growth is stagnant across the globe. GDP growth per capita in Africa is under strain and very likely to contract materially.

The economic and social damage caused by the pandemic is devastating, with recovery likely to take years. For many countries, tourism and tourist receipts are a vital component of government revenue. The resulting drop in national income has consequences far beyond the sector. Spill-over effects include reductions in foreign exchange inflows, growing current account deficits, currency depreciation and deferred investments in infrastructure.

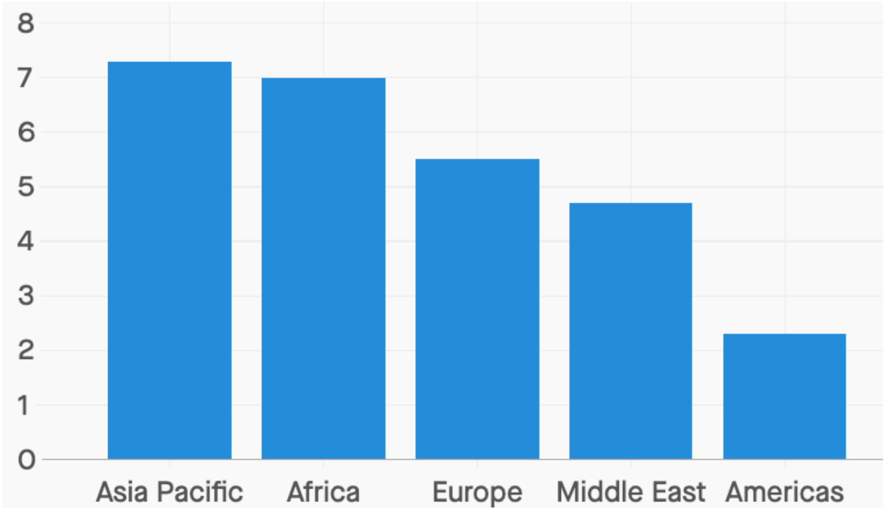
Several countries on the continent rolled out financial support for the sector to alleviate some of the hardship, with varying degrees of success. However, Kenya earmarked very little financial support for the tourism industry, despite mounting job losses. In South Africa, much of the funding allocated for recovery of the sector was delayed by red tape, and thus not disbursed in time to save many small enterprises. Some operators managed to adapt their business models to survive. Many others were forced to shut their doors. The industry teeters on the brink of consolidation, with airlines, hotels, and resorts leading the way. This appears to be the situation not only on the African continent, but also across the globe.

This analysis examines the impact of COVID-19 on five of the continent's most important tourism destinations (Morocco, South Africa, Kenya, Mauritius, and Seychelles). It explores how countries and businesses responded to high levels of uncertainty and positioned themselves for a rebound. What different paths did each take to weather the coronavirus storm? Were some naturally endowed with a competitive advantage or simply more agile, strategic and creative? Answering these questions will provide insight into the actions Africa's tourism sector can take to reinvent itself and thrive in a post-COVID-19 world.

1. Batten down the hatches: From boom to bust

In emerging markets such as in Africa, the industry, infrastructure and tax revenue streams are less developed and diversified than those in the US, Europe and Asia. Tourism is a critical component of the continent's economies. It provides corporate, government and individual revenue and employment.[1] The Jumia 2019 Hospitality Report revealed Africa as the world's second fastest growing tourist industry, second only to the Asia Pacific.[2] The report estimates tourism growth on the continent at 5.6% year-on-year. Tourism contributed almost 9% of the region's GDP, approaching US $200 billion.

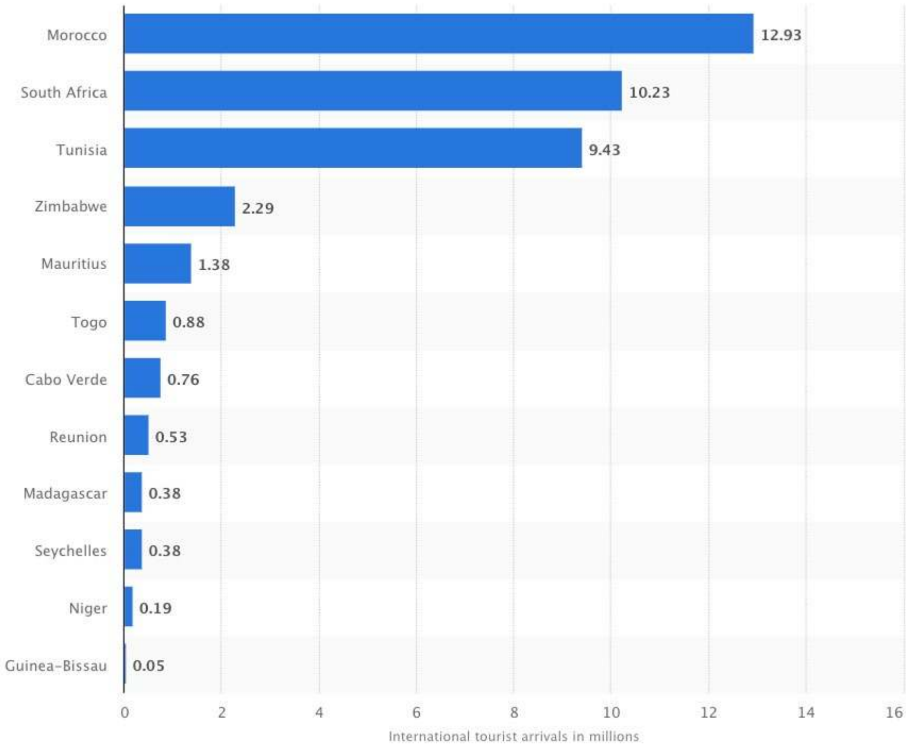
Figure 1: Fastest growing tourism regions



Source: UNWTO

In 2019, tourist arrivals to Africa increased 7%, reaching almost 70 million. As seen in Figure 2 below, Morocco and South Africa hosted the lion's share of visitors, at 12.9 million and 10.2 million respectively.[3] In terms of visitor spending, South Africa edged out Morocco to earn top spot at US $8.4 billion against Morocco's US $8.2 billion. Tunisia (9.4 million), Zimbabwe (2.3 million) and Mauritius (1.4 million) make up the balance of the top five African tourist destinations.

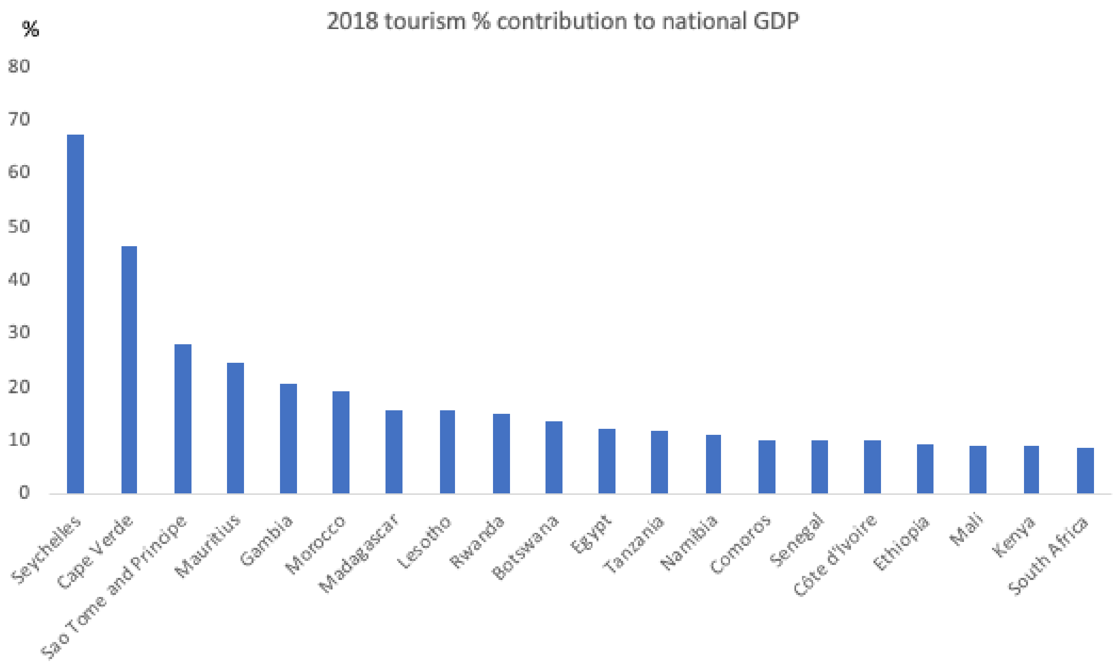
Figure 2: Africa tourist arrivals (millions - 2019)



Source: Statista

The sector's importance could also be considered as a percentage of total employment. In the Seychelles, almost 50% of those with jobs work in the travel and tourism industry. This number is 20% in Mauritius and 5% in South Africa – the Sub-Saharan average is 1 in 20. These figures exclude those working in peripheral sectors such as restaurants, retailers and informal traders often geared toward tourists. Tourism's contribution to GDP clearly shows that Africa's island economies derive extensive income benefits from tourism (Figure 3). However, concentration risk is significant.

Figure 3: 2018 tourism contribution of national GDP

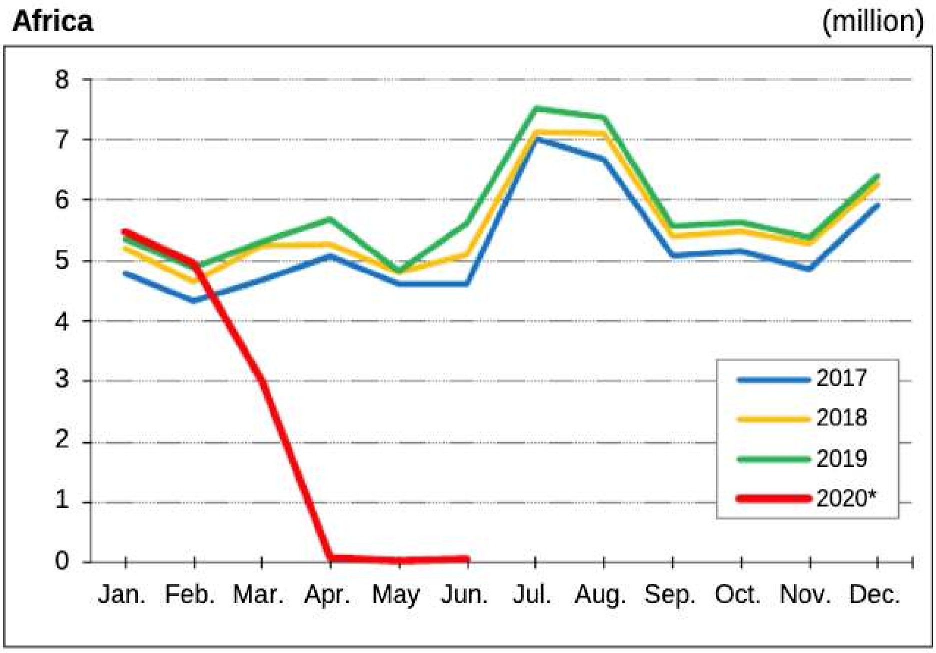


Source: Knoema, World Travel and Tourism Council

2020 was set to be another bumper year on the continent, generating employment and much needed foreign exchange revenue. The COVID-19 outbreak laid waste to these dreams. Border closures and a near-complete halt to international air travel led not only to cancellation of holidays and business travel bookings[4] (sometimes refunded), but that tourists would stay away until the severity and trajectory of the disease became clear.[5]

In April, the United Nations World Tourism Organization (UNWTO) estimated that global international tourist arrivals could fall by up to 80% in 2020. Arrivals to Africa declined by 12% in the first quarter of the year. As this estimate reflects pre-lockdown figures, the last three quarters of the year are likely to be substantially worse (Figure 4). This trend could lead to overall losses in 2020 of up to US $50 billion.[6]

Figure 4: International tourist arrivals to Africa by year and month



Source: UNWTO

The longer-term implications for the continent are severe and will take years to reverse. Lost revenue will lead to greater indebtedness (and require national carrier support) for a longer period of time. These will compromise the timeframe for achieving development goals and delay economic progress. For the sector itself, investment growth is likely to slow dramatically, and capacity destruction is already evident.

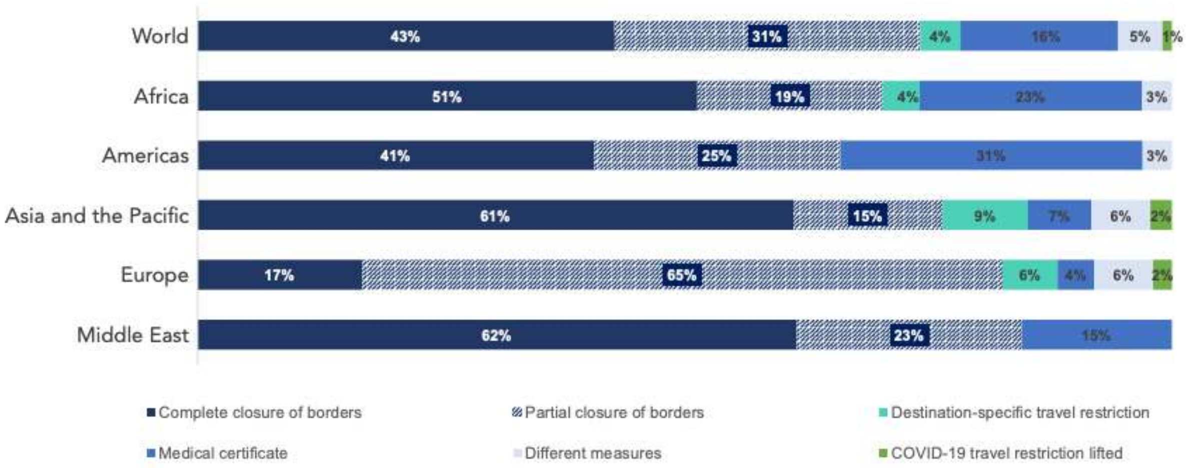
2. No right answer: Africa's varying tourism responses to COVID-19

Travel restrictions

As the pandemic began to take hold toward the end of the first quarter of the year, 27 African destinations (51%) completely closed their borders[7] – (Figure 4). For the most part, international flights were grounded while many also imposed severe restrictions on domestic travel to curb the contagion. The few flights that remained were for repatriating African citizens abroad unable to return home due to the lockdown.

The impact on the continent's carriers was inevitable, given their fixed-cost structures. Royal Air Moroc, South African Airways, Kenya Airways, Air Mauritius, and Air Seychelles are all either under administration, in default on loans and/or receiving extensive financial support from shareholders.[8] As the severity of the outbreak begins to ease, African economies are cautiously reopening their borders, albeit selectively (Figure 5). Countries like Morocco, South Africa and Mauritius rolled out some of the tightest travel restrictions in the world.

Figure 5: Regional breakdown of travel restrictions as of 1 September 2020



Source: UNWTO

Morocco

The UK, Spain and France are Africa's main tourist sources, and suffered the most severe outbreaks. Morocco is desperate to lure visitors back. The country announced in early September that it would open its borders to 67 countries, including the United States, Canada, Australia, New Zealand and Europe.[9] Visitors must demonstrate on arrival that they tested negative for COVID-19 within the previous 48 hours. All are subject to a seven-day isolation period followed by a second COVID-19 test.[10] Wearing masks is mandatory in all public places. Morocco's most popular tourist cities are Casablanca, Tangier and Marrakesh. Sadly, these remain under lockdown as the country battles rising infections.

The impact on the tourism industry was devastating, with #MarrakeshSuffocates trending on social media.[11] Officials soon launched a program to absorb vulnerable travel and tourism employees into other sectors of the economy, grow the craft and creative sector and develop artisanal products to attract tourists. The government set up a special COVID-19 social security fund and extended the deadline for tourism operators to apply for financial support. Tax payments were deferred for the industry, with banks mandated to provide payment holidays to provide a measure of relief. Although well intentioned, the financial support is wholly insufficient to support the market. In an attempt to offset the collapse in foreign visitors, the government encourages Moroccans to explore the ancient souks of Marrakech and beaches of Agadir. Unfortunately, the economic environment and continued lockdowns of its many popular attractions prevents Moroccans from doing this.[12] Making up almost 20% of GDP, the sharp decline of tourism revenues will be a severe drag on economic growth this year, and the impacts will be felt for years to come.

South Africa

South Africa is the most severely impacted nation on the continent, registering the highest COVID-19 infection rates and the greatest death toll. Yet, the country does have one of the world's highest recovery rates (89%) and lowest mortality rates. Like Morocco, South Africa imposed strict lockdowns, both on international and domestic travel. The nation locked down its land borders, grounded international and domestic flights, and turned away cruise ships. Inter-provincial travel was allowed only in exceptional circumstances.

After six months of lockdown, the country eased travel measures and gradually opened to tourists from select countries. But for many sector participants, the damage is already done, and will be irreversible. Several foreign investors in the country's hotel industry, among them the Kuwait-based IFA Hotels and

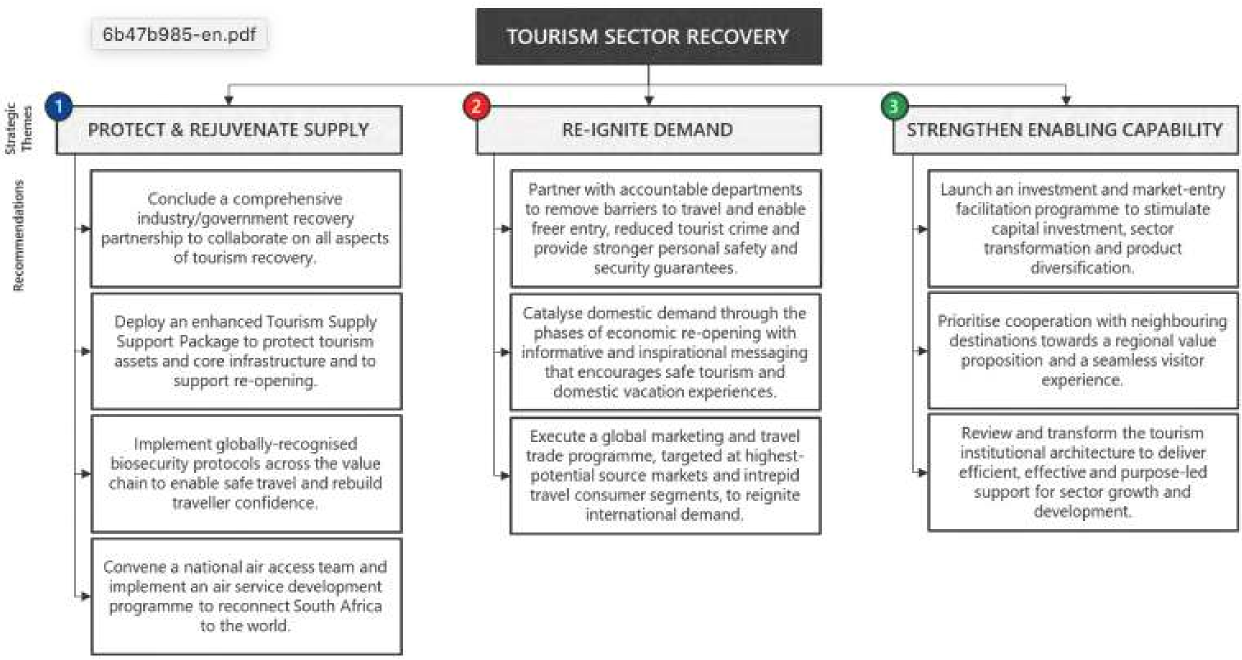
Resorts (Fairmont Zimbali Hotel) exited for financial reasons.[13] Tsogo Sun, one of the country's largest hotel and destination companies, closed 36 of its hotels amidst the collapse in demand.[14] Some hotel owners like RevPAR, Bon Hotels and the Capital Group repurposed their facilities as quarantine areas, call centres or even "aparthotels" – short term apartment rentals – but such stopgap measures were not sufficient to sustain economic activity.

Inevitably, the downward trend in demand has yet to reach bottom. In the large corporate space, the situation presents opportunities for cash flush operators looking to gain market share. They can purchase distressed assets at exceptionally cheap valuations. While this would be a valuable lifeline for small operators and their employees, the broader global macro picture is not yet conducive to M&A activity.

Tour guides, informal traders, safari parks, restaurants and entertainment venues were hit especially hard. Some sit-down restaurants were able to pivot to take-aways. Others illegally sold alcohol in defiance of a national ban on liquor trade. These were purely survival measures. Smaller and with little access to debt funding, smaller firms were faced not only with a complete halt in international guests, but even their local patrons were banned from these venues. Support for the industry has been patchy and riddled with corruption, with many COVID-19 financial relief fund applicants not receiving disbursements in time to rescue their businesses.

The country has a history of disservice to its tourism industry, through unnecessary and onerous visa uncertainty and insisting that foreign tourists present unabridged birth certificates for inbound minors. South Africa's tourism recovery plan, stretching over two years, will also target domestic tourism.[15] In a country with a 30% unemployment rate, cash-strapped consumers have little room for discretionary spending. Even more radical interventions, none of which are yet announced, may be required (Figure 6). However, when markets reopen, its weak currency will offer value to tourist arrivals, and may spur growth.

Figure 6: South African Tourism Recovery Plan



Source: Gov.za

Kenya

After closing its airspace and implementing health restrictions in March, Kenya reopened to international tourists in August.[16] Famed for its Wildebeest migration across the Maasai Mara and heavily dependent on US, European and Chinese wildlife enthusiasts, Kenyan tourism has all but ground to a halt. The sector normally generates US $1.4 billion annually but has already lost US $752 million tourist dollars in 2020. The sector brings in more than US $200 million between June and September. This can't happen again until 2021.[17]

More than two million Kenyans work in the tourism sector, each supporting many others. The ripple effect is extensive. Many livelihoods are lost, while government support remains scarce. Kenyan authorities allocated just US $5 million to support the struggling sector. Some lodges report modest success in attracting local tourists, but as in South Africa, this has not been enough to keep many operators afloat.[18] Operators are aggressively pivoting to cater to Kenyans, many of whom could previously not afford to stay in the country's exclusive and internationally orientated resorts. This has become a point of contention for some Kenyans when, in an attempt to lure local tourists, The Safari Collection advertised deep discounts and implied that the country's citizens could now afford to stay at their resorts.

Kenya has prior experience of a tourism collapse, unlike many other countries. In 1998 and again between 2011 and 2017, the sector struggled in the wake of Al Shabaab / Al Qaeda linked terrorist attacks.[19] The country's tourism sector never fully recovered, despite investing heavily in security and revamping its international image. Like Morocco and South Africa, Kenya's economy is well diversified. This will help offset some of the downward pull from the tourism sector. Africa's island economies are less fortunate.

The islands

Tourism contributes greatly to the economies of Seychelles and Mauritius. The sector earns more than two thirds of Seychelles' GDP and employs 50% its working population. Tourism contributes a quarter of Mauritius' GDP and employs 20% of its working population. Despite these parallels, the two governments adopted quite different approaches to protect the lives of their citizens while trying to minimise the impact on livelihoods.

Mauritius

The small island nation suffered just 356 cases and 10 deaths due to the coronavirus. Its government reacted swiftly to the pandemic and implemented stringent measures to prevent imported cases. International flights, suspended in March, are to resume on 1 October. Many expect tourism to open in earnest only in 2021, with current plans geared only for long-stay visits. As with many African countries, arriving tourists must present proof of a negative COVID-19 test taken within the previous five days, and must undergo a 14 day quarantine period at an approved establishment.[20] This protocol will need review as borders begin to open. Even deep discount pricing will not be enough to convince most tourists to spend the first two weeks of their stay in quarantine.

To date, the government disbursed US $5 million to nearly 40,000 sector employees under a wage assistance scheme.[21] The government expects unemployment numbers to soar by 150% to reach 100,000 as a result of the disruption. Far greater financial assistance will be required.[22] Tax payments were deferred for some operators, with half due at the end of 2020, and the balance in mid-2021. Mauritius valued lives over livelihoods, but the country has an extensive social safety net with free universal healthcare and a US $300 monthly stipend for citizens over 60.[23] Given that the country remains under lockdown, much of their recovery path is yet to be decided. For now, the country is hoping that its extremely low infection rate will make it a preferred destination once borders begin to reopen.[24]

Seychelles

The Seychelles took a somewhat different approach. Lacking the social support resources of Mauritius, it was imperative that the country's vital tourism sector return to business as quickly as possible. The country boasts zero COVID-19 deaths and just 132 cases, almost all imported. The Seychelles opened its borders far earlier than most (in June) but acted to stem transmission by initially welcoming only those staying on the outer islands or arriving on private jets from low risk countries. It opened commercial flights a month later and requires visitors to present negative COVID tests on arrival and stay at certified hotels and resorts that adhere strictly to health protocols.[25] Cruise ships, however, were banned until 2022. In addition to opening its economy early, the government committed US $70 million for salary payments until the end of 2020, deferred tax payments for six months and agreed with banks on a six-month moratorium on loan repayments.

The government has also encouraged the private sector to take creative and innovative approaches to attract new visitors. The emphasis will be on adding value and specialised services. Seychelles is marketing aggressively in low-risk countries, offering potential tourists flexible booking policies and cancellations without penalties. This is an important tactic, given the unpredictable course of the disease. It gives customers peace of mind and creates a favourable impression of hospitality.[26] One suggested route for the Seychelles is to venture down the marijuana tourism path. Legalisation and marketing might increase visitor numbers and tourist revenue, while the taxation of cannabis could provide a substantial boost to government earnings that can fund badly needed infrastructure.

Despite these interventions, tourist volumes remain well below historic levels. About 4,000 jobs may be lost on the tiny island nation, and its currency has depreciated 20% against the US dollar. Stakeholders in the sector agree that Seychelles should focus on positioning itself for a rebound in 2021, when it intends to be top of mind as a tourist destination.

Insufficient government support is a common factor across all these African destinations; this gap is in part due to fiscal constraints. In some instances, the sector fails to receive the attention and funding it deserves, given how important it is to many parts of the broader economy. Instead, funding is diverted to prop up uncompetitive national airlines. These carriers ferry tourists at a loss when more efficient commercial carriers can do this at far less cost to government. State owned airline funding could be put to far more productive use by supporting tourism operators directly. In economic shock conditions such as those currently experienced by the continent, some job losses are inevitable. With more efficiently allocated resources, the impacts on employment needn't be as severe.

3. To open, or not to open

Egypt and Tunisia took a path similar to Seychelles. They began enticing tourists in the first half of 2020. Despite strong efforts, their tourist sectors struggled. In Egypt, hotels and resorts operate below 50% capacity and even popular tourist destinations such as the pyramids remain empty. Since July, just 220,000 (less than 10% of the normal volume) visited the Red Sea province.[27] Similarly, Tunisia saw tourist numbers drop by 73% compared to the same period in 2019, with European visitors falling 85%.[28]

The cases of Seychelles, Egypt and Tunisia clearly demonstrate that falls in tourism volumes and revenue were beyond their control. Opening early was a calculated gamble. If not well managed, such moves might have led to dire long-term consequences for health and damaged reputations. In opening up far earlier than many of their continental peers, these countries took a strategic long-term view. They understood that the likelihood of visitors streaming back was close to zero, given that that tourists would remain cautious and strict conditions applied. Opening early was essentially a marketing exercise, positioning for a rebound in 2021, or even later. Offering flexible booking and cancellation terms with good discounting and value builds their tourist arrival pipelines and generates goodwill among potential tourists. A positive image goes a long way in terms of visitor experience.

Ultimately, while there are no winners, some countries will lose out more than others. Morocco and South Africa are likely to take the longest to bounce back from their very strict lockdowns. Kenya is likely to struggle given the highly seasonal nature of its market, but these economies are relatively well diversified. Mauritius might bounce back faster thanks to strong government support, but now faces the additional setback of a recent oil spill along its beaches. Of the five countries reviewed, the Seychelles is likely to be the hardest hit, yet the fastest to recover. The island nation is savvy in engaging potential visitors and shows itself to be nimble and strategic. Seychelles established trust and goodwill with those that needed to cancel, offering them credits or refunding them outright. Also, their market is geared to more affluent guests that are naturally more resilient in a downturn.

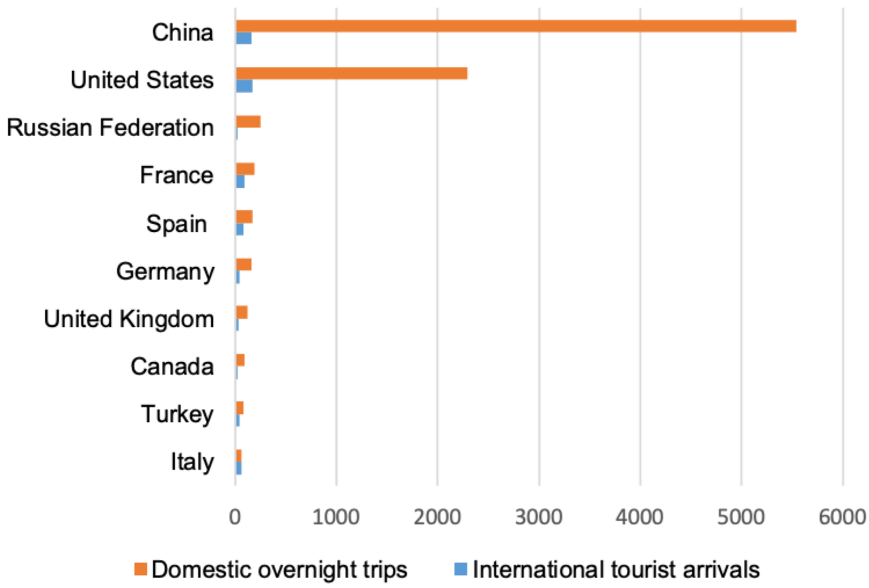
As the road ahead is long and unpredictable, governments and tourist bodies should move rapidly to lay a platform for a post-COVID-19 tourism environment that caters to needs and expectations that are very different from those from the pre-pandemic era. New tourism themes (shifting demographics, reasons for visiting, travel arrangements, duration of stay, focus on health, etc.) are likely to emerge once the dust settles. There is a great deal that countries can do now to ensure they reap the full benefit from the post-pandemic rebound.

4. Tourism 2.0: Positioning for the future

Almost across the board, countries seek to stimulate domestic tourism to offset the impact of international travel bans. While this low-hanging fruit is essential for short-term survival, the shift is unsustainable. Very few countries across the world can generate sufficient revenue from their domestic markets to continue without major disruptions. The primary barrier is that few domestic travellers have the level of disposable income held by their international counterparts. This is particularly the case for Africa, where most countries are overly reliant on more affluent travellers and their much-needed foreign exchange.

Tourists from abroad have the additional advantage of strong currencies, and their money goes a long way on the continent. Most tourism, travel and accommodation operations set their prices and manage their costs according to international incomes. This prices domestic tourists out of the market. Barring extensive operational restructuring and comprehensive cost reductions, many businesses in the sector will be unable to sustain their operations until international visitors return. The problem is amplified given the small size of the African domestic tourist market, relative to countries such as the US and China (Figure 7).

Figure 7: Domestic overnight trips vs. international tourist arrivals by country



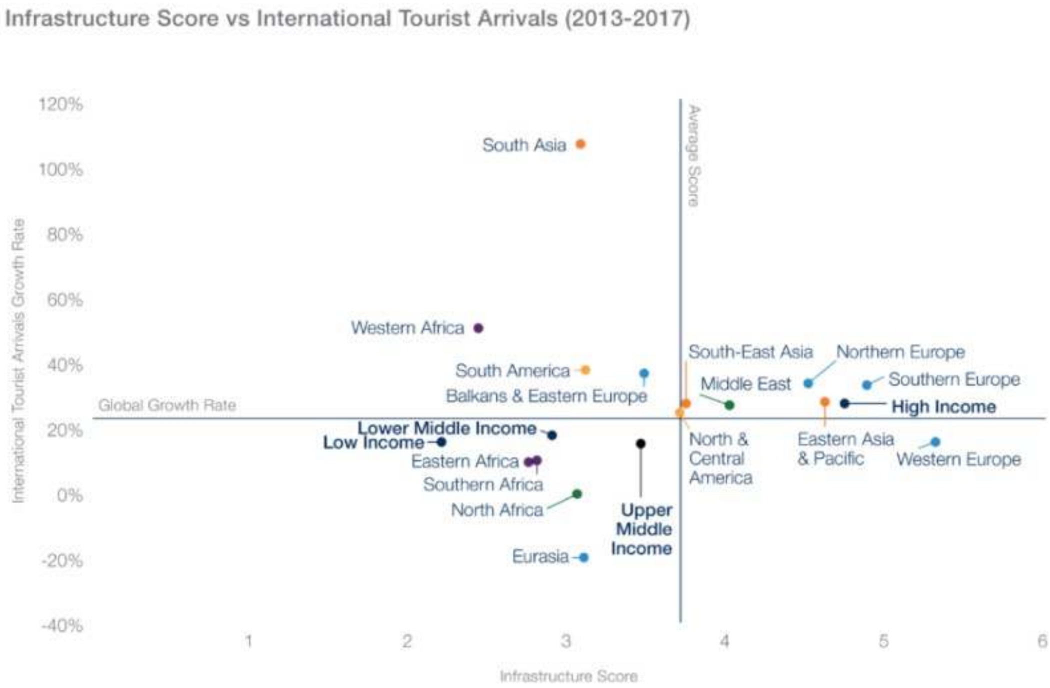
Source: UNWTO

Apart from their thriving domestic tourism markets, the US, China and Europe have strong domestic business travel markets with natural tourist spinoffs. The poor health of the global economy and pressures to trim costs deter a rapid recovery in business travel. The lockdown experience forced participants to rely on video and telephone links and demonstrated that most business engagements could be conducted virtually. Despite the obvious benefits from in-person meetings, business travel, conventions, exhibitions, and conferences (a major support to Africa's tourist industry) may never recover to pre-pandemic levels.

To counter these headwinds, Africa must lean into the benefits of the African Continental Free Trade Agreement (AfCFTA). This pact is currently set to commence in January 2021. Tourism is one of the focus sectors under the African trade integration project. Tariff free intra-African trade for Africa-made goods will provide a vital boost to infrastructure investment, economic and business activity. Also, it promises to reduce trade costs, gradually improve living standards and promote easier movement of people across borders.

The advent of free trade under AfCFTA provides African countries with the ideal opportunity to begin to invest in the requisite hard and soft infrastructure, while improving their tourism reputation. As is clearly evident from the World Economic Forum's 2019 Travel and Tourism Competitiveness Index, Africa has a lot of catching up to do (Figure 8). Efficient world-class road, rail and air transportation infrastructure and operations are vital to the realisation of AfCFTA's ambitions and would dramatically improve the continent's tourism attractiveness. Such infrastructure will take many years to develop but is essential if the continent is to grow its share of the global tourism market. Only 5% of international tourist arrivals are to African destinations, and only 1% of earnings in the sector accrue to Africa.[29]

Figure 8: Tourism infrastructure readiness



Source: WEF

Much more needs to be done to open up country visa issuance. AfCFTA may remedy some of these barriers. The approach to lifting visa restrictions should be geared to a post-COVID-19 world. For example, Barbados sees the growing trend toward digital nomadism— young and mobile workers in the global knowledge economy who can operate from anywhere in the world and who want to visit and explore new countries by working in them. The island is considering allowing such workers a 12-month Barbados Visa Stamp, which would allow them to live and work in the country.[30]

Not only will such measures help generate revenue, employment and skills transfer, but they will help smooth some of tourism's inherent seasonality and cyclicality. Many countries generate the bulk of their tourist revenue across a few months of each year. Initiatives like the United Kingdom's "Eat out to help out" scheme might also be adapted to the African context to support small business and generate employment. The continent's relatively low infection rates might also allow regulators to consider "tourism bubbles" similar to that between New Zealand and Australia. Coupled with promotions and discounts, initiatives such as these could go a long way to strengthen domestic tourism culture on the continent.

The tourist of the future is also likely to be younger and less well off. As the highly infectious COVID-19 is more likely to be fatal among older age groups, many older and more affluent tourists may opt to travel domestically. The continent must actively promote its relatively low infection rate to differentiate African tourist markets from those such as the US, Europe and Asia where infection rates surged. Strong value propositions need to be developed and channelled to younger tourists via popular social media platforms. These might appeal to segments such as nature conservation advocates and trigger their growing awareness of climate change and interest in making a difference – through eco-tourism.[31]

As noted by Sisa Ntshona, Chief Executive Officer of South Africa Tourism[32]:

> *"What's going to change fundamentally is the behaviour pattern of the tourists. This is going to be about safety and confidence and trust."*

His comments focused on the important role of strict hygiene and health protocols to ensure that tourists don't feel apprehensive about visiting South Africa. They apply as well to harassment, crime, corruption and terrorism. These issues generate negative perceptions of tourism, not just in Africa, but globally. Africa must work toward reducing these negative perceptions through effective policing and controls. There is very little that African countries can do to generate immediate demand, but much that can be put in place to attract the interest of newer and younger tourists who demand greater flexibility, service and value.

Attracting this demographic, which is also interested in exploring more of their continent and its cultures, is an investment for the future. Such upwardly mobile visitors will move up the employment and income scale to become more affluent. Investing financial and human resources to ensure their needs are met as world travel expands will make the difference between gaining market share or remaining stuck in neutral. Above all else, the continent should (under AfCFTA) pool its knowledge and resources to collectively benefit as a continent, rather than competing against each other to interest potential tourists.

Conclusion

It is too soon to gauge international interest or how long it will take for demand to return. The world's tourism path to recovery has not yet started and any improvement is likely to be gradual and non-linear.[33] It is also still impossible to definitively say whether extended hard lockdowns or more liberal tourist policies will provide a better outcome. What is clear though, is that tourism will be quite different once the dust settles on the pandemic. Those countries using the lull to develop the best infrastructure and policies, and who offer the most compelling value proposition when the upturn does occur, will have won the attention of a new generation of tourist.

While it is difficult to pick out a silver lining from the current environment, COVID-19 does offer an opportunity to critically assess what needs to change for Africa to improve its tourism standing in the world and increase its market share. The continent is naturally gifted with exceptional natural beauty, and rich in heritage and culture, and offers many attractive opportunities. COVID-19 may be just the jolt needed by its tourism sector to shake off its overreliance on wealthy international travellers and develop strong and sustainable growth off its modest base.

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