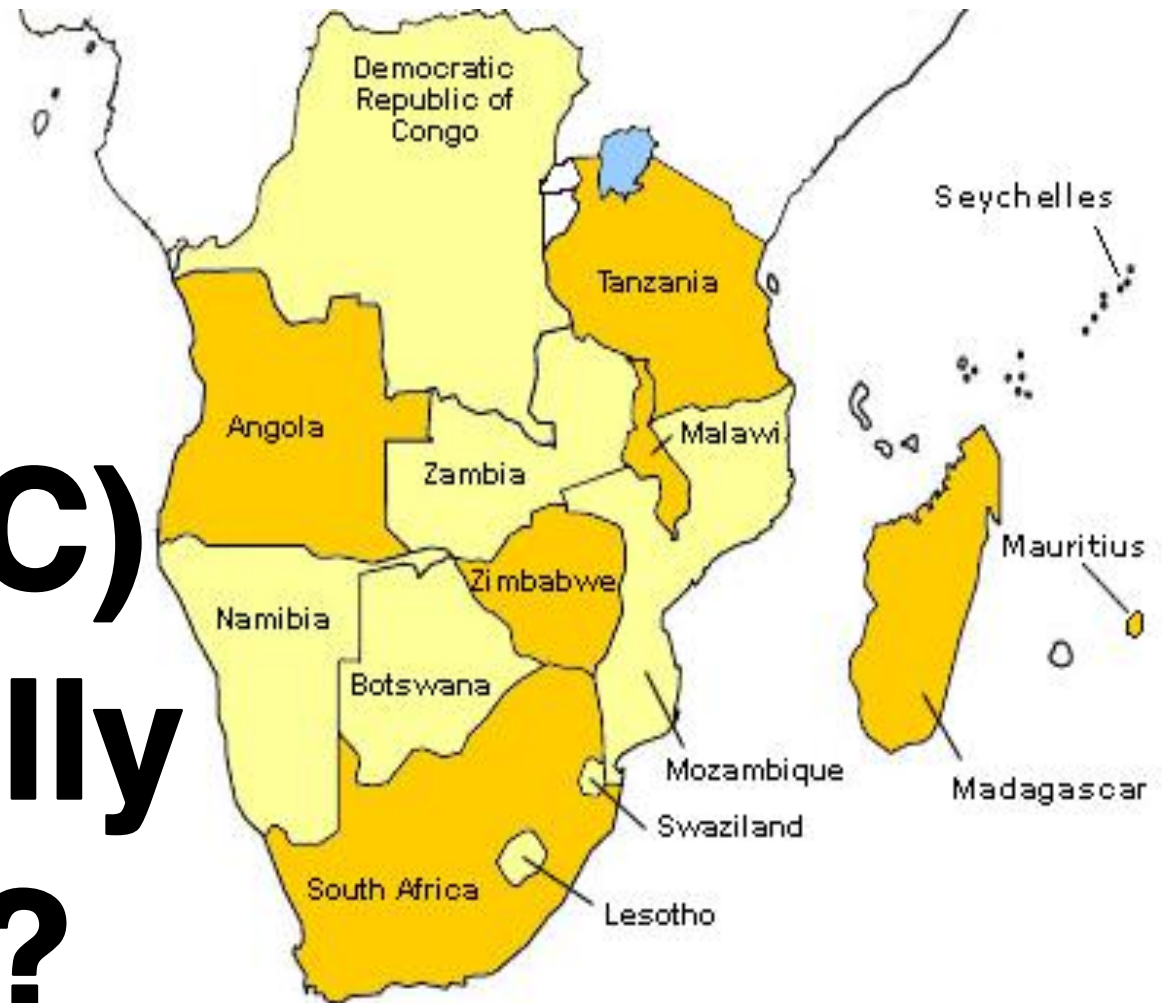


Is Tourism in Southern Africa (SADC) internationally competitive?

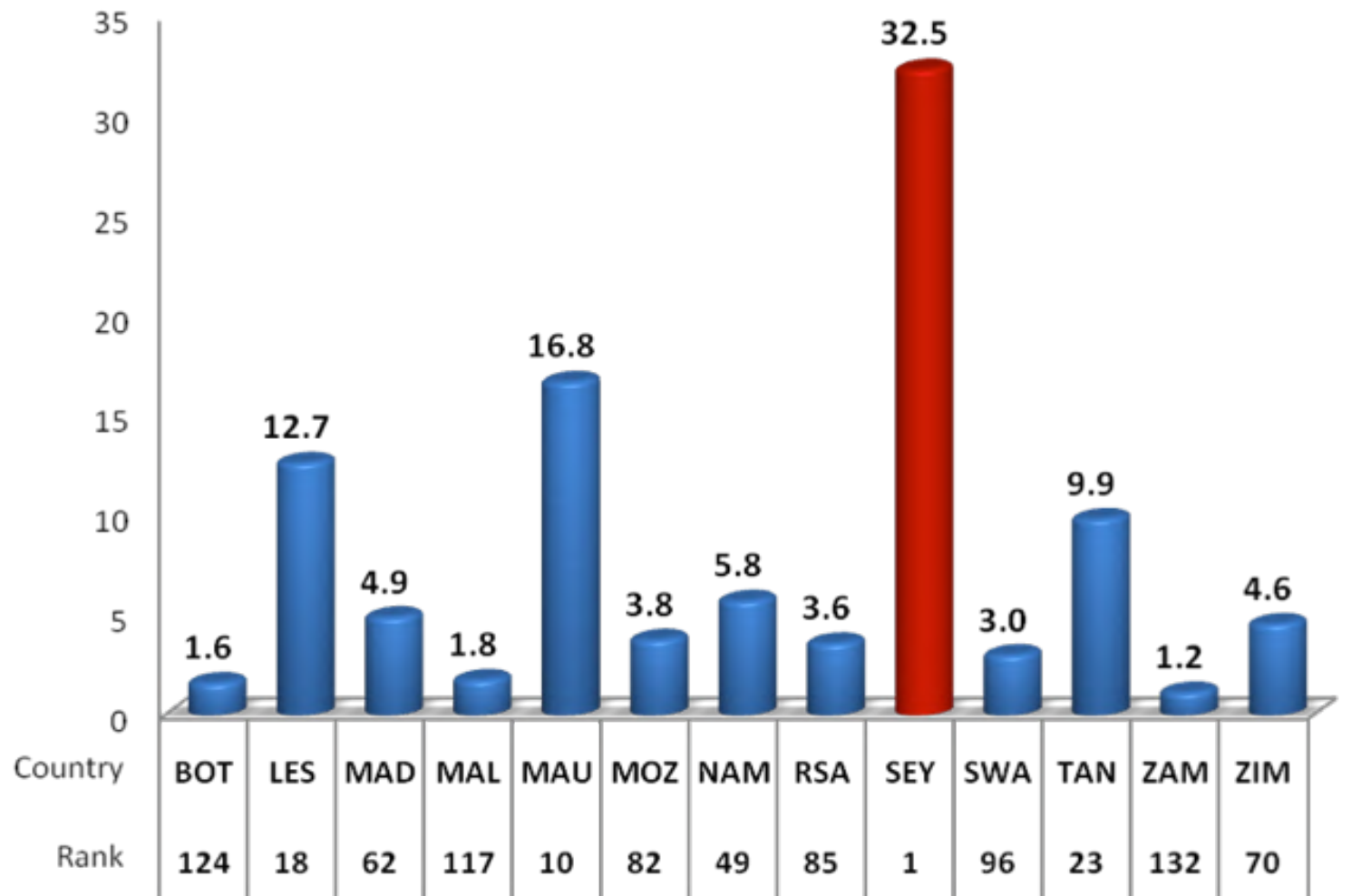


Results from the
World Economic Forum's Travel and
Tourism Competitiveness Index 2013



The tourism sector is of significant importance to most SADC states

WEF Travel & Tourism Competitiveness Index 2013



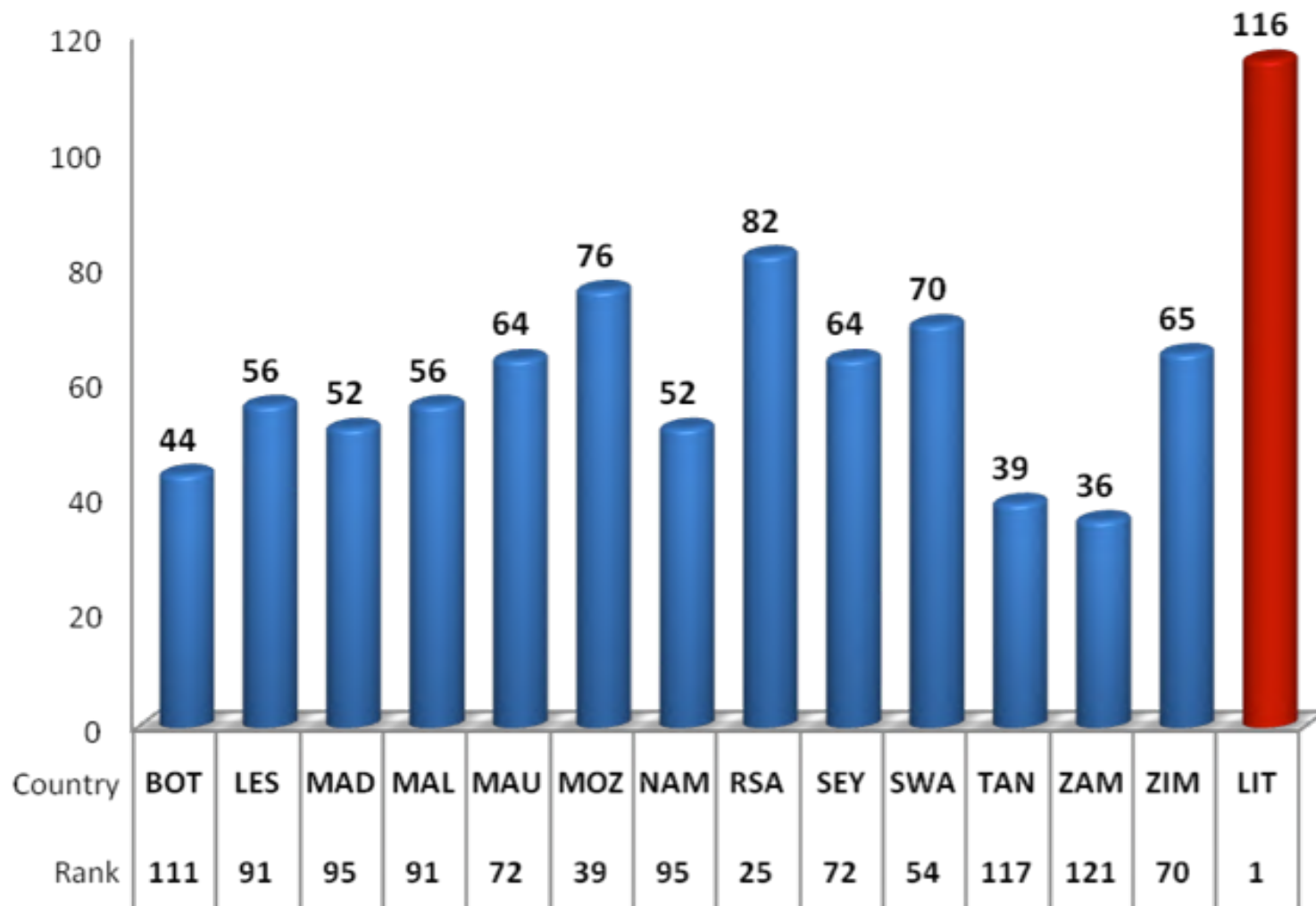
Tourism expenditure and receipts as a percentage of GDP | 2011

This variable is the ratio of the sum of international tourism expenditures and receipts to GDP. Sources: World Tourism Organization; International Monetary Fund, World Economic Outlook, 2012



Annual Travel and Tourism data is often not available

WEF Travel & Tourism Competitiveness Index 2013

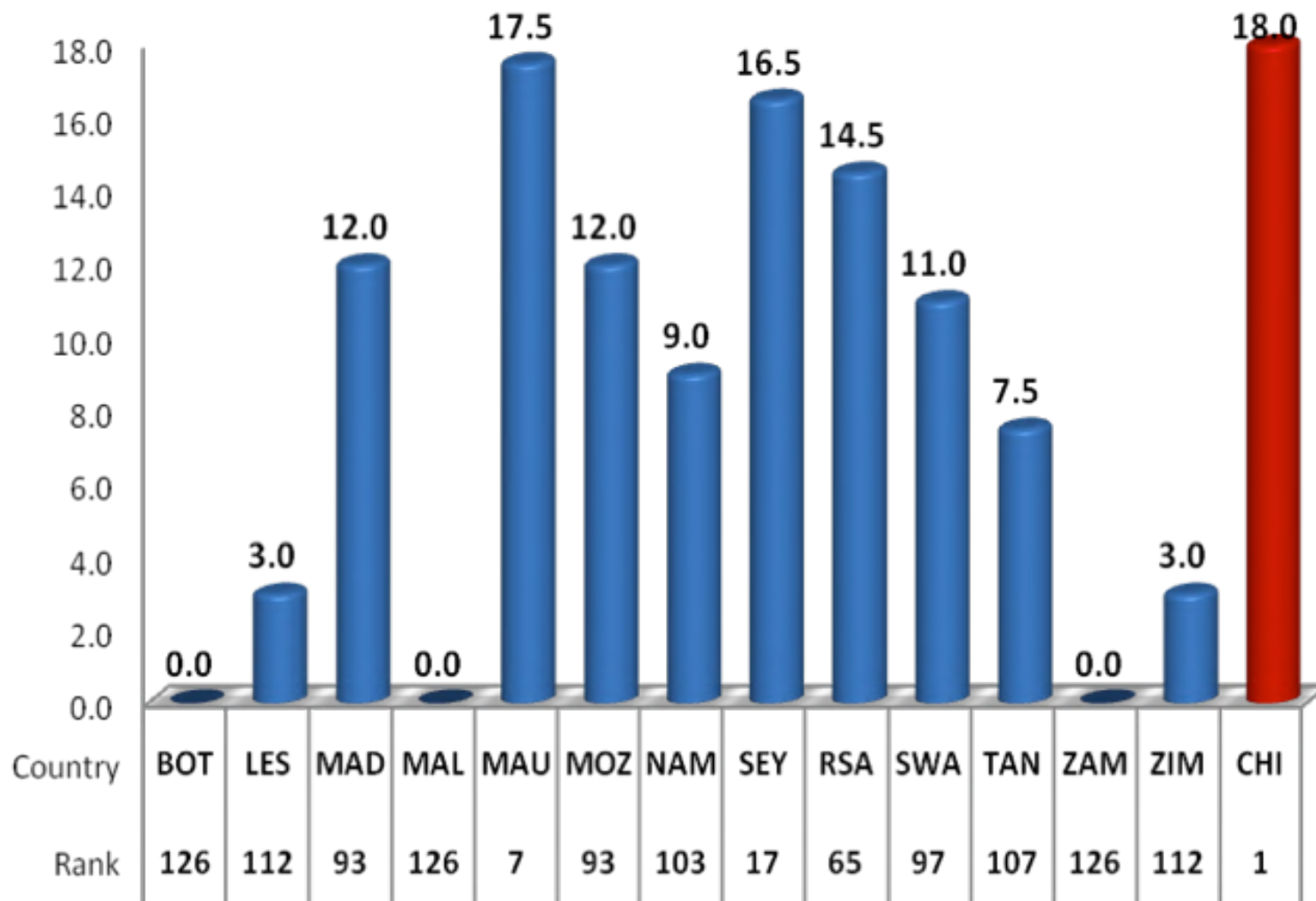


Number of data available [0 = no data; 120 = all selected indicators are available] | 2012. This indicator shows how many of the yearly data provided by national administrations, on 30 different concepts from the UNWTO Compendium of Tourism Statistics, are available. (WEF 2013)



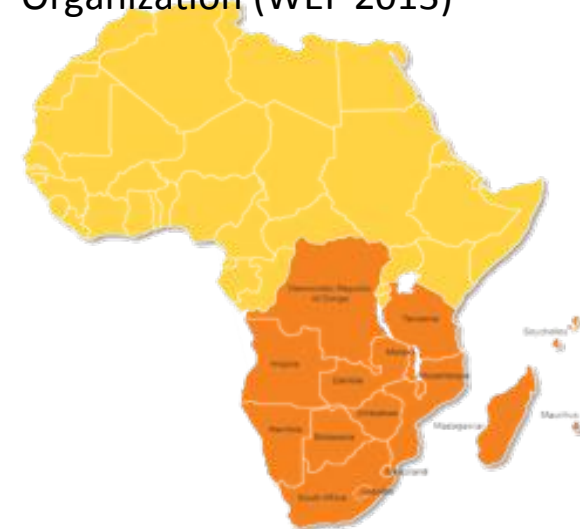
Travel and Tourism data often not provided in a timely fashion

WEF Travel & Tourism Competitiveness Index 2013



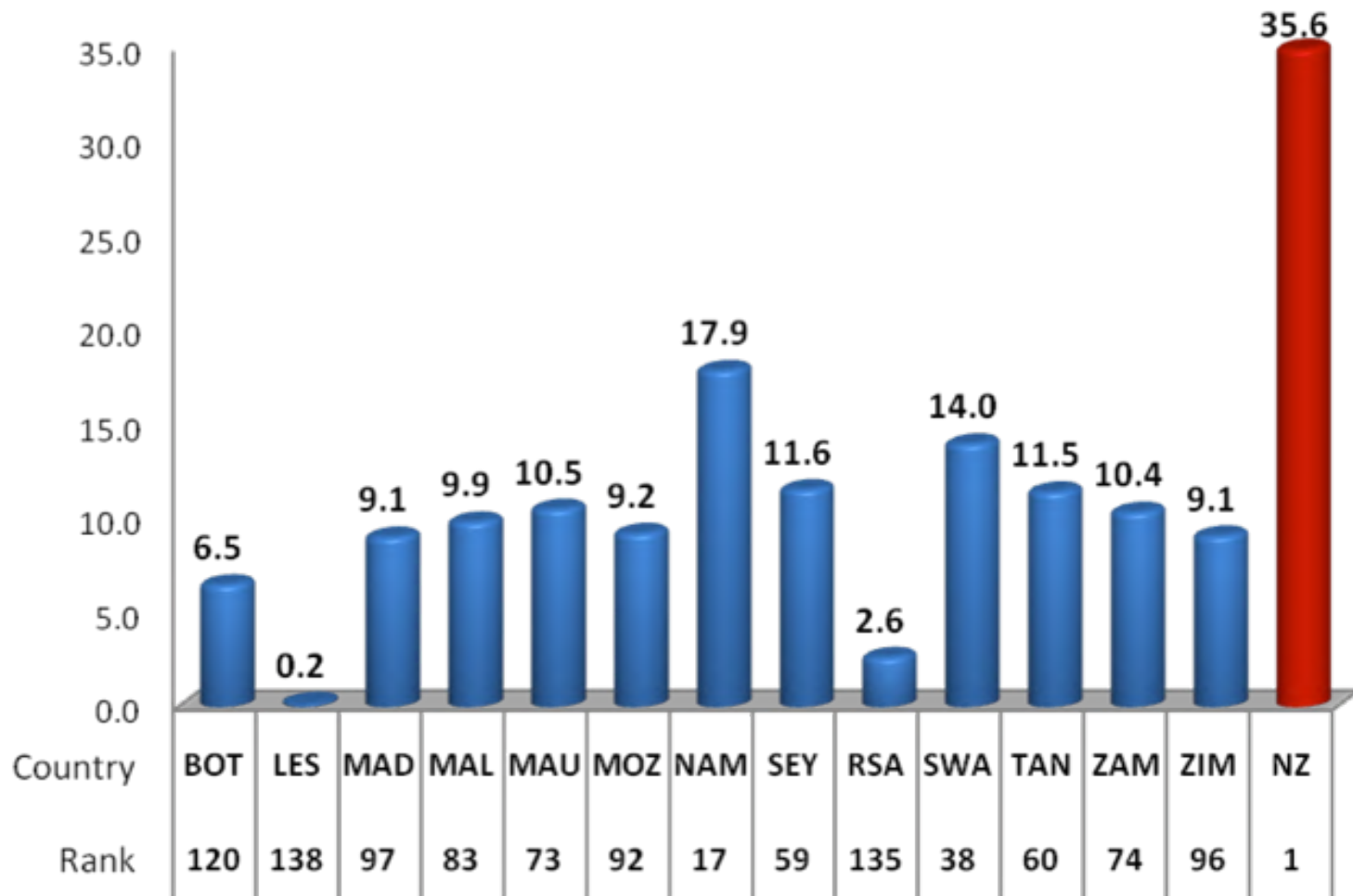
Number of latest data available [0 = no data; 18 = data reported for all the periods considered] | 2012

This variable shows the availability of two key T&T indicators (international tourist arrivals and tourism receipts) on a monthly or quarterly basis, covering the period from October 2011 to September 2012. Source: World Tourism Organization (WEF 2013)



Restrictive aviation regulations limit airline competition

WEF Travel & Tourism Competitiveness Index 2013

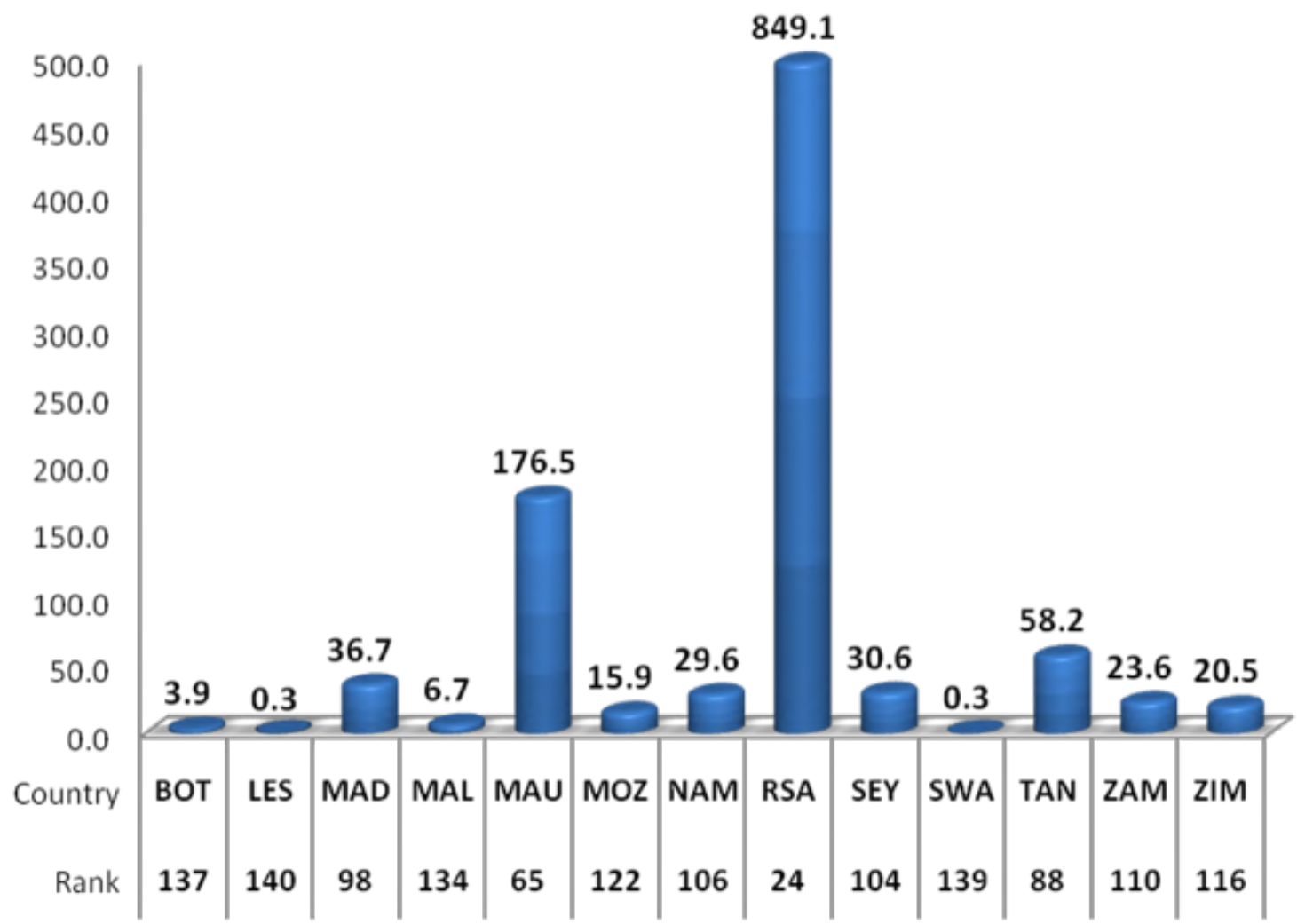


Index measuring the average openness of Air Service Agreements [0 = most restricted; 38 = most liberal] | 2011 Sources: World Trade Organization, based on ICAO and IATA data (WEF 2013)



Most countries have very limited international seat capacity

WEF Travel & Tourism Competitiveness Index 2013

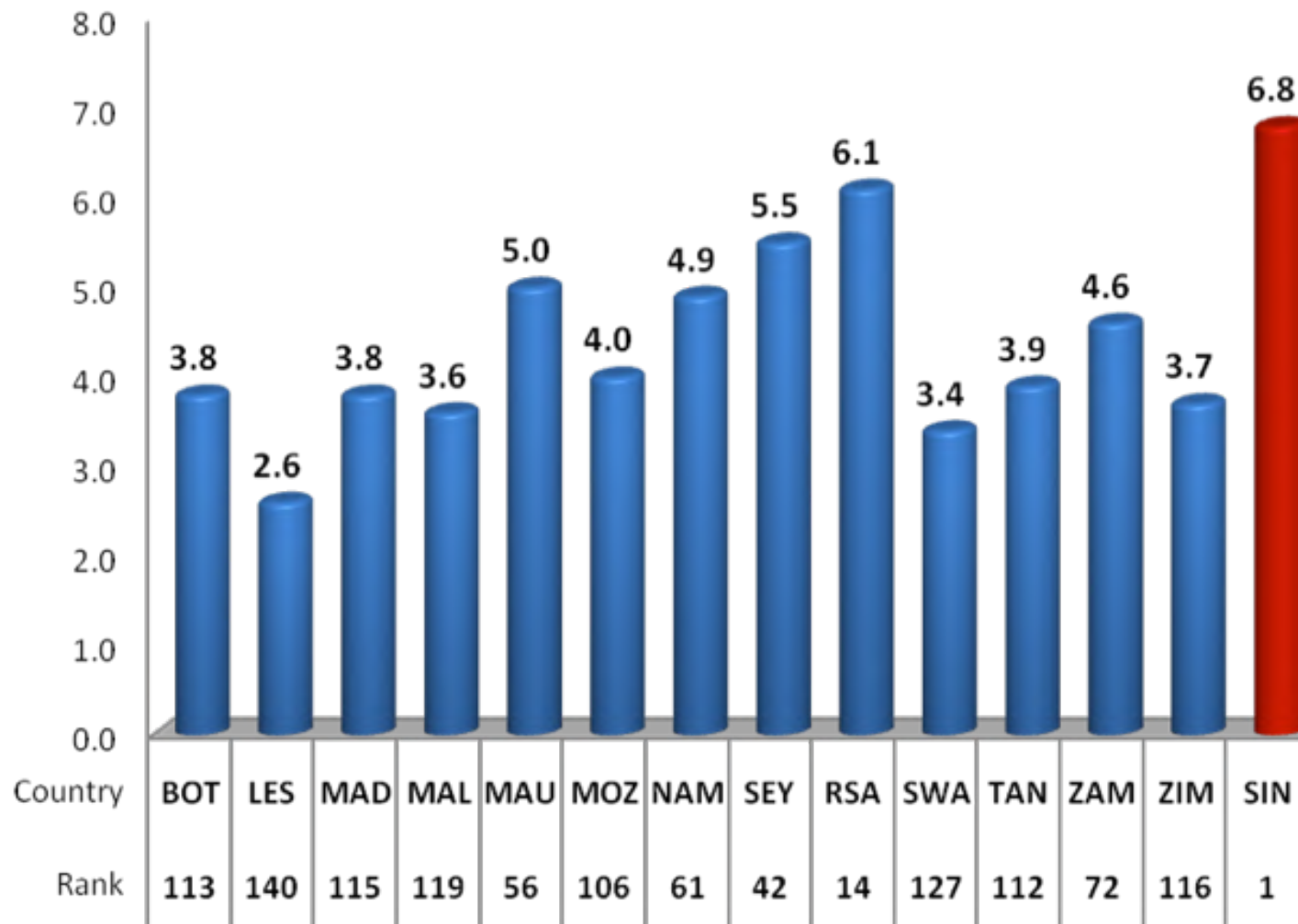


Scheduled available international seat kilometers per week originating in country (millions) | 2011. Source: International Air Transport Association, (WEF 2013) This variable measures an airline's passenger-carrying capacity; it is composed of the number of seats available on each international flight multiplied by the flight distance in kilometers.



Limited air connections to the most important overseas markets

WEF Travel & Tourism Competitiveness Index 2013

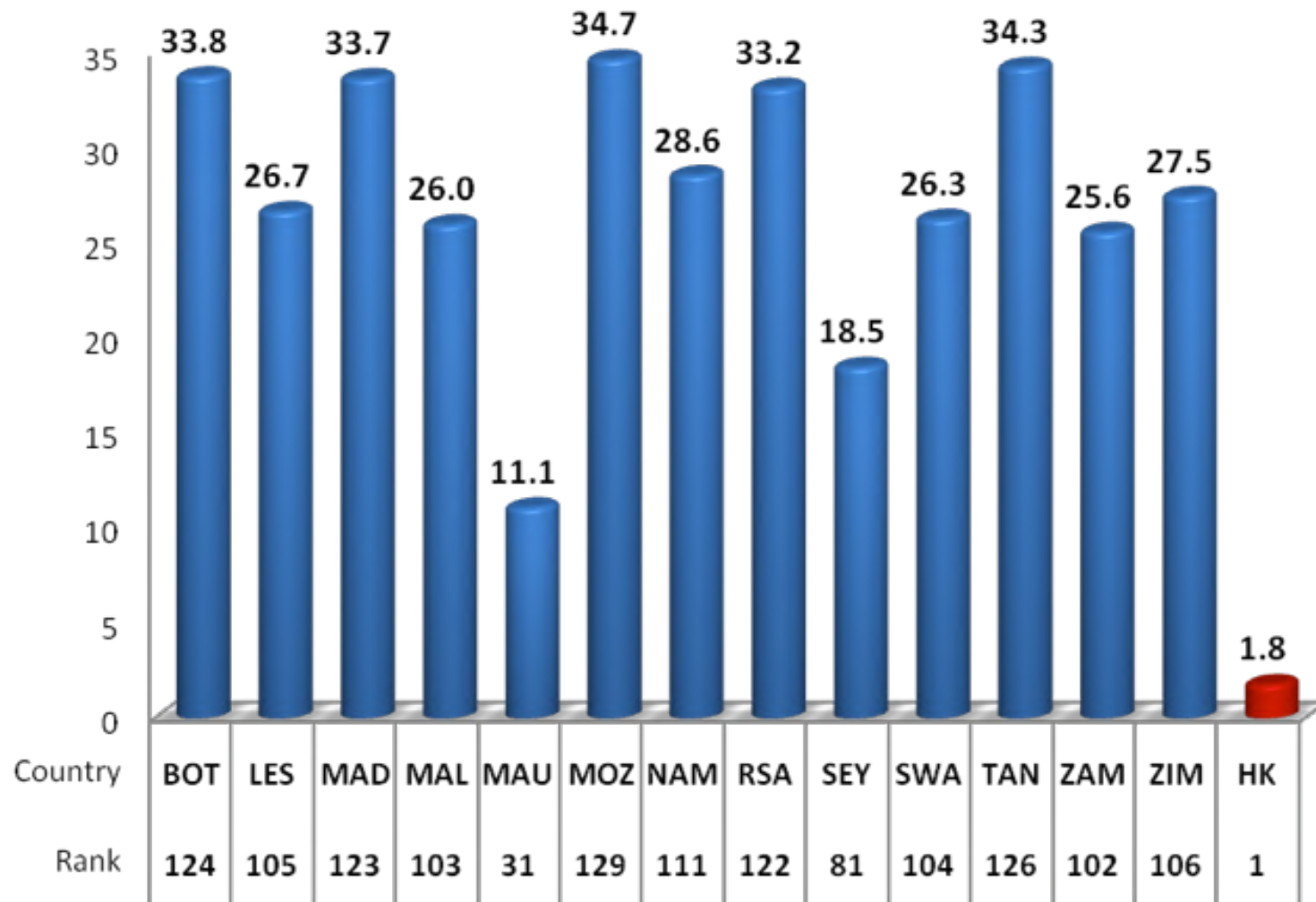


Executive Opinion Survey: “To what extent does the air transport network in your country provide connections to the overseas markets offering the greatest potential to your country’s businesses?” [1 = not at all; 7 = extremely well] | 2011–2012 weighted average. (WEF 2013)



Frequent road traffic accidents in most SADC countries

WEF Travel & Tourism Competitiveness Index 2013

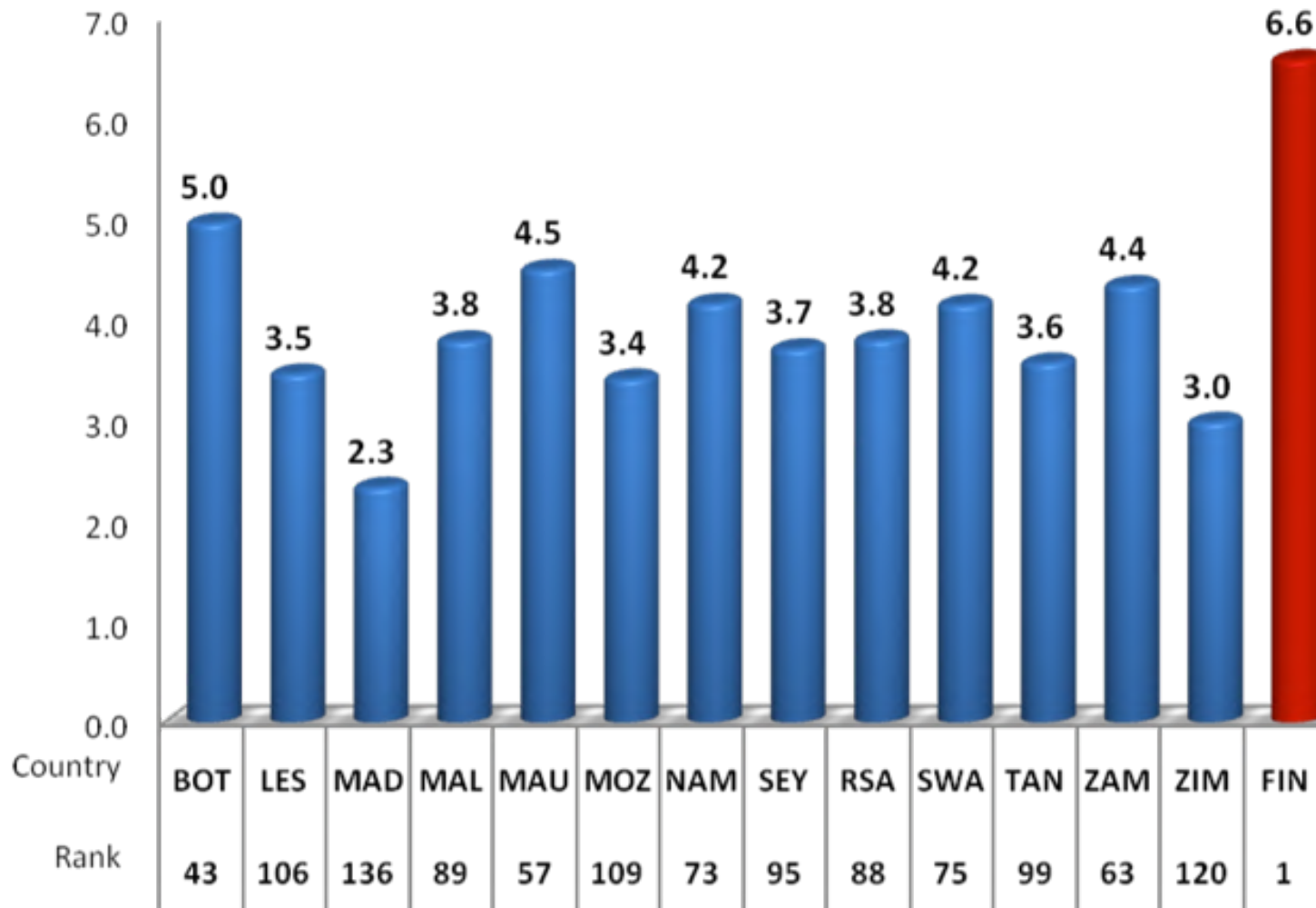


Estimated deaths due to road traffic accidents per 100,000 population | 2007 (Source: WEF 2013)



Police services are not trusted to enforce law and order

WEF Travel & Tourism Competitiveness Index 2013

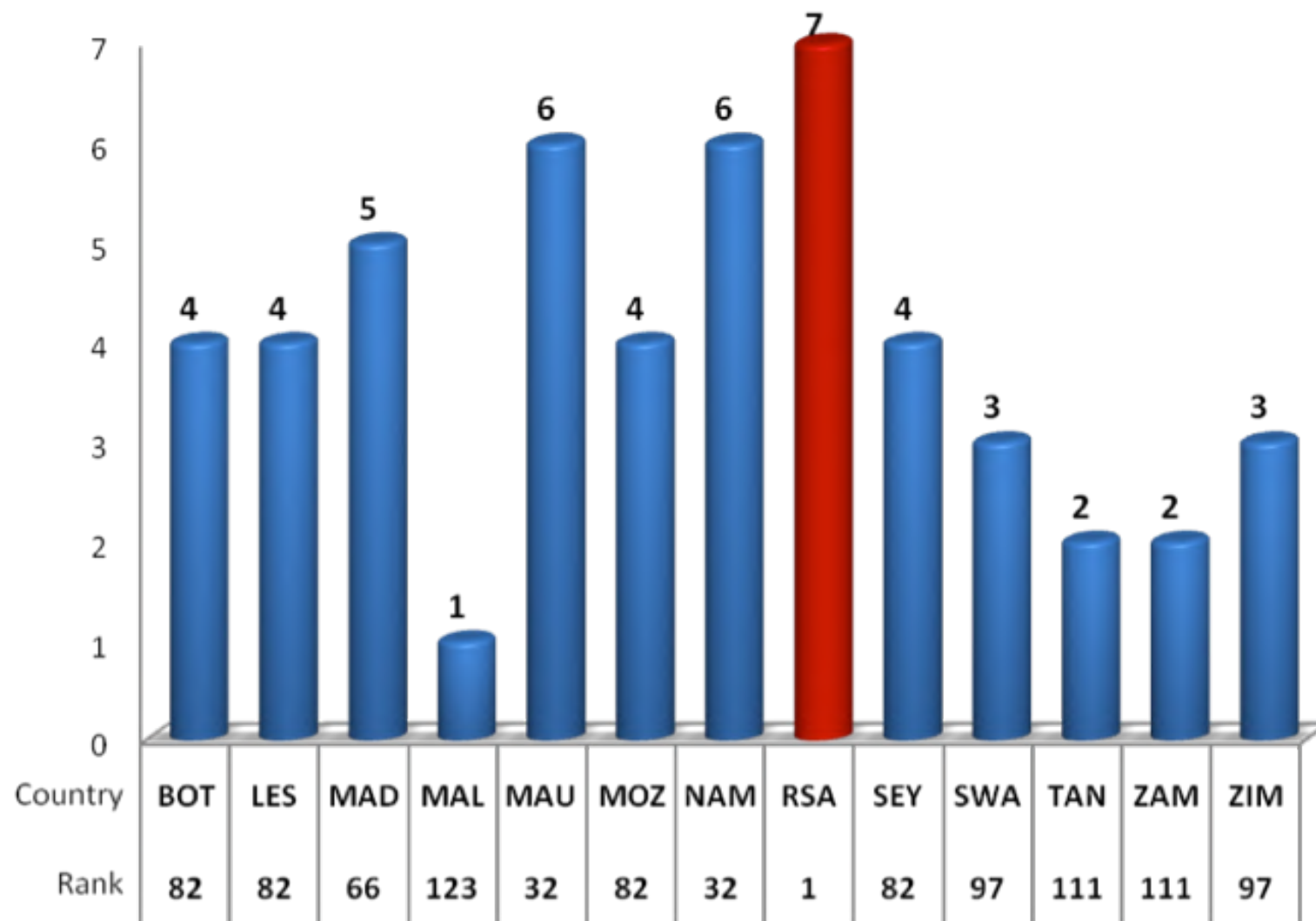


Executive Opinion Survey “To what extent can police services be relied upon to enforce law and order in your country?” [1 = cannot be relied upon at all; 7 = can be completely relied upon] | 2011–2012 weighted Average (Source: WEF 2013)



Car rental not yet a popular option, restricting self-drive tourism

WEF Travel & Tourism Competitiveness Index 2013



Index of presence of major car rental companies

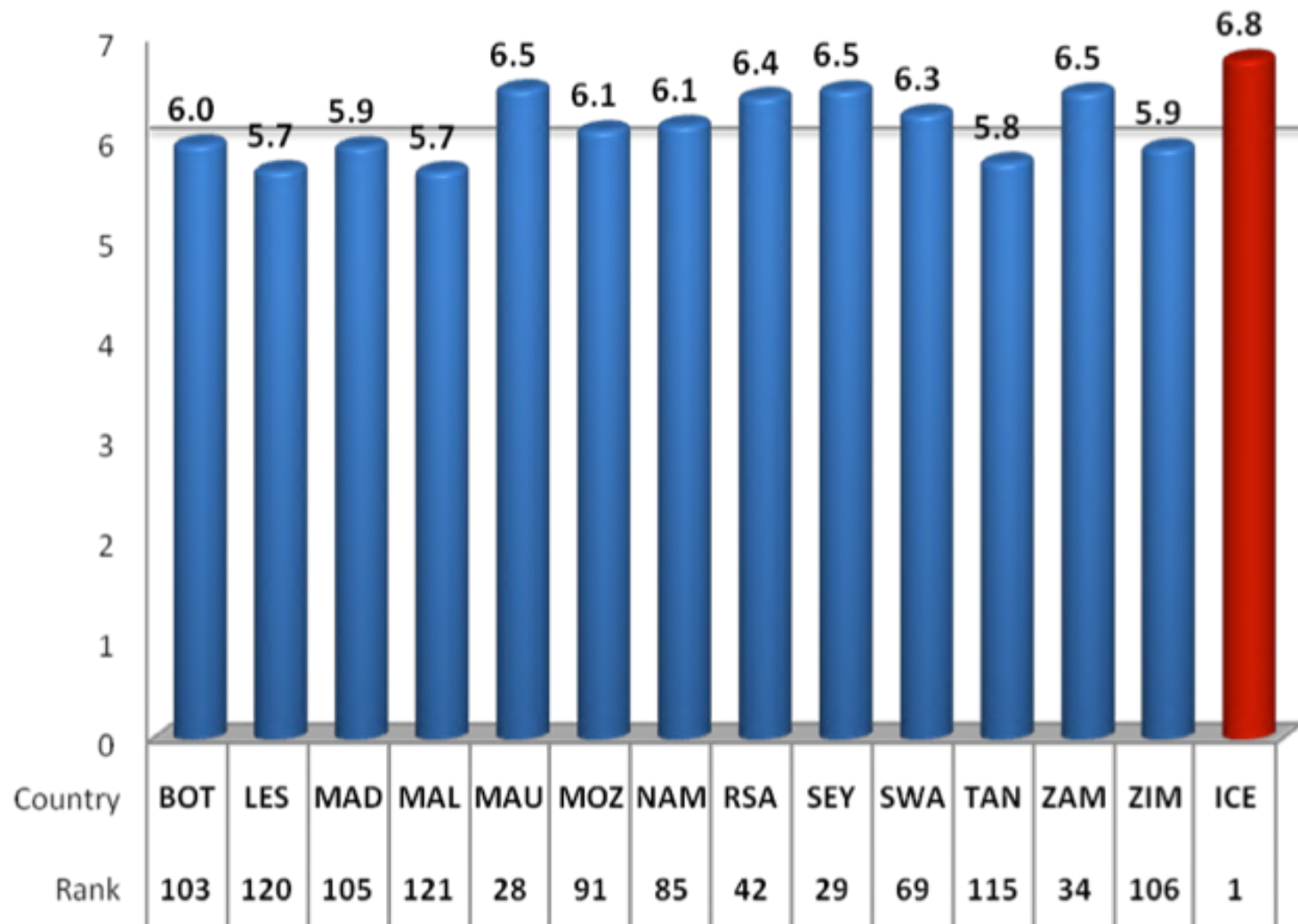
[1 = no company is present; 7 = all the 7 considered companies are present] | 2012

This indicator measures the presence of seven major car rental companies: Avis, Budget, Europcar, Hertz, National Car Rental, Sixt, and Thrifty.



Largely positive attitude of local population towards foreign visitors

WEF Travel & Tourism Competitiveness Index 2013

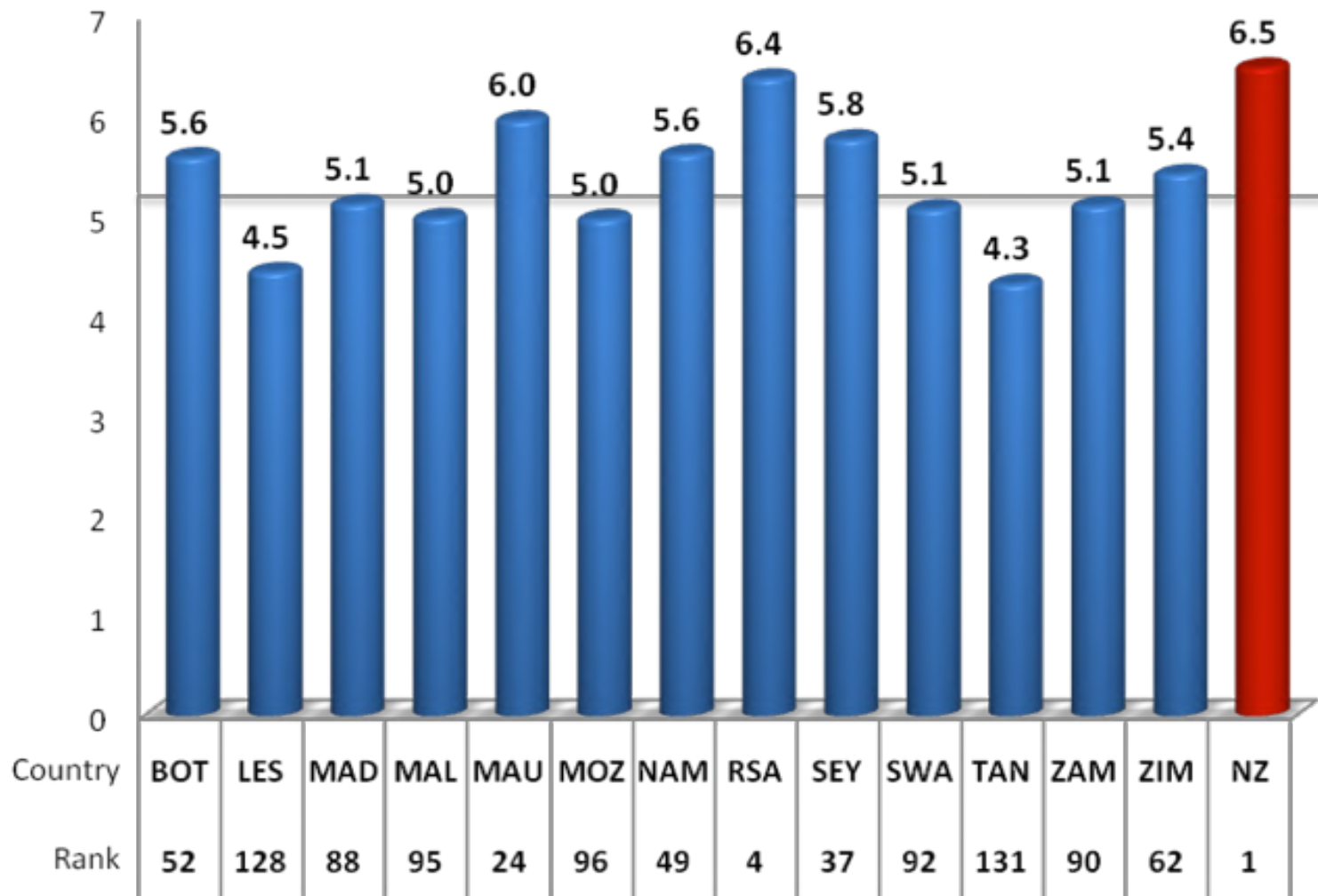


Executive Opinion Survey:
“How welcome are foreign visitors in your country?”
[1 = very unwelcome; 7 = very welcome] | 2011–2012
weighted average (WEF 2013)



Extension of business trips not always recommended

WEF Travel & Tourism Competitiveness Index 2013

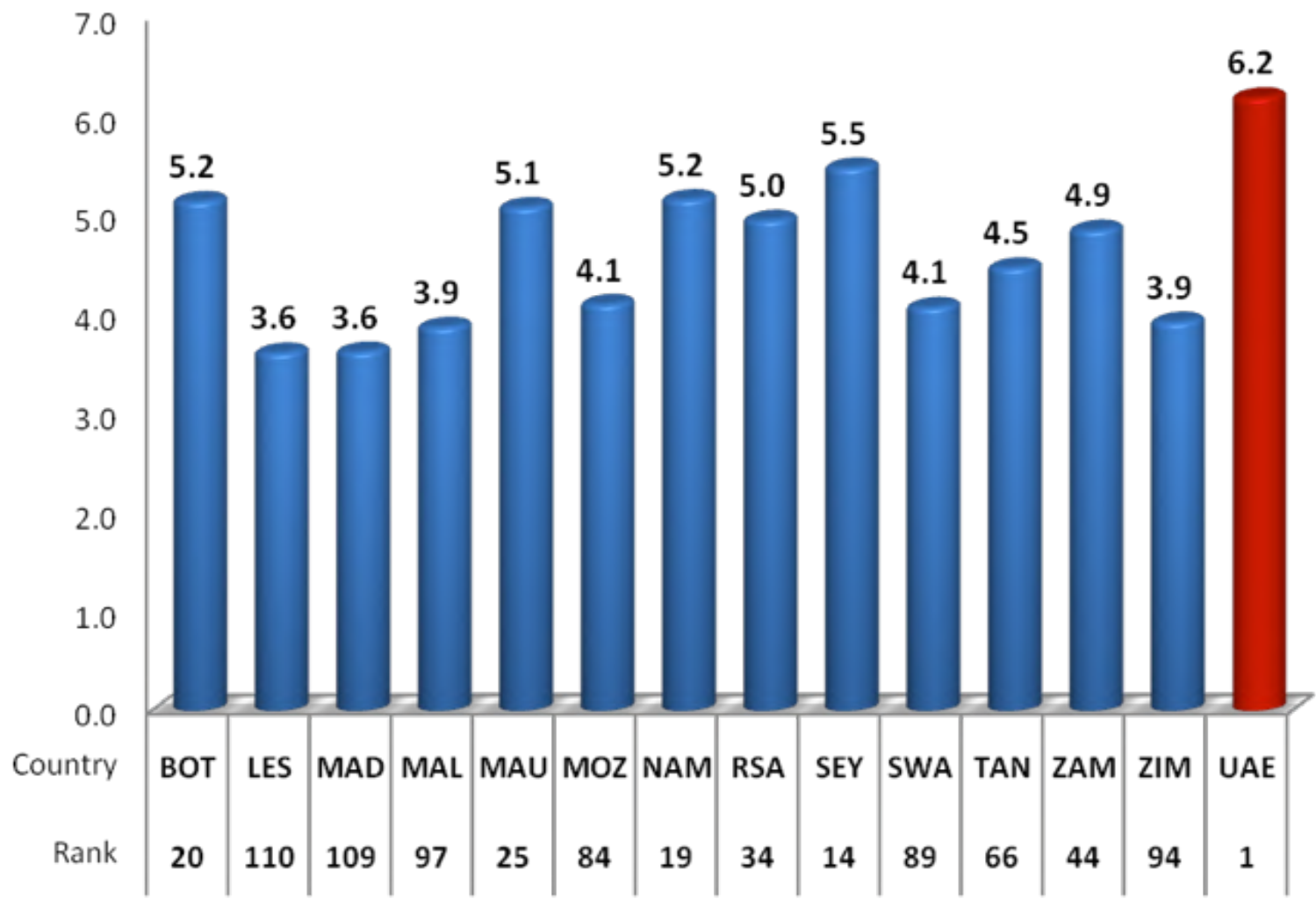


Executive Opinion Survey:
 “When senior executives visit
 your country for the first
 time for business purposes,
 how likely are you to
 recommend extending their
 trip for leisure purposes?” [1
 = very unlikely; 7 = very likely]
 | 2011–2012. WEF 2013



Development of travel & tourism industry is not always sustainable

WEF Travel & Tourism Competitiveness Index 2013

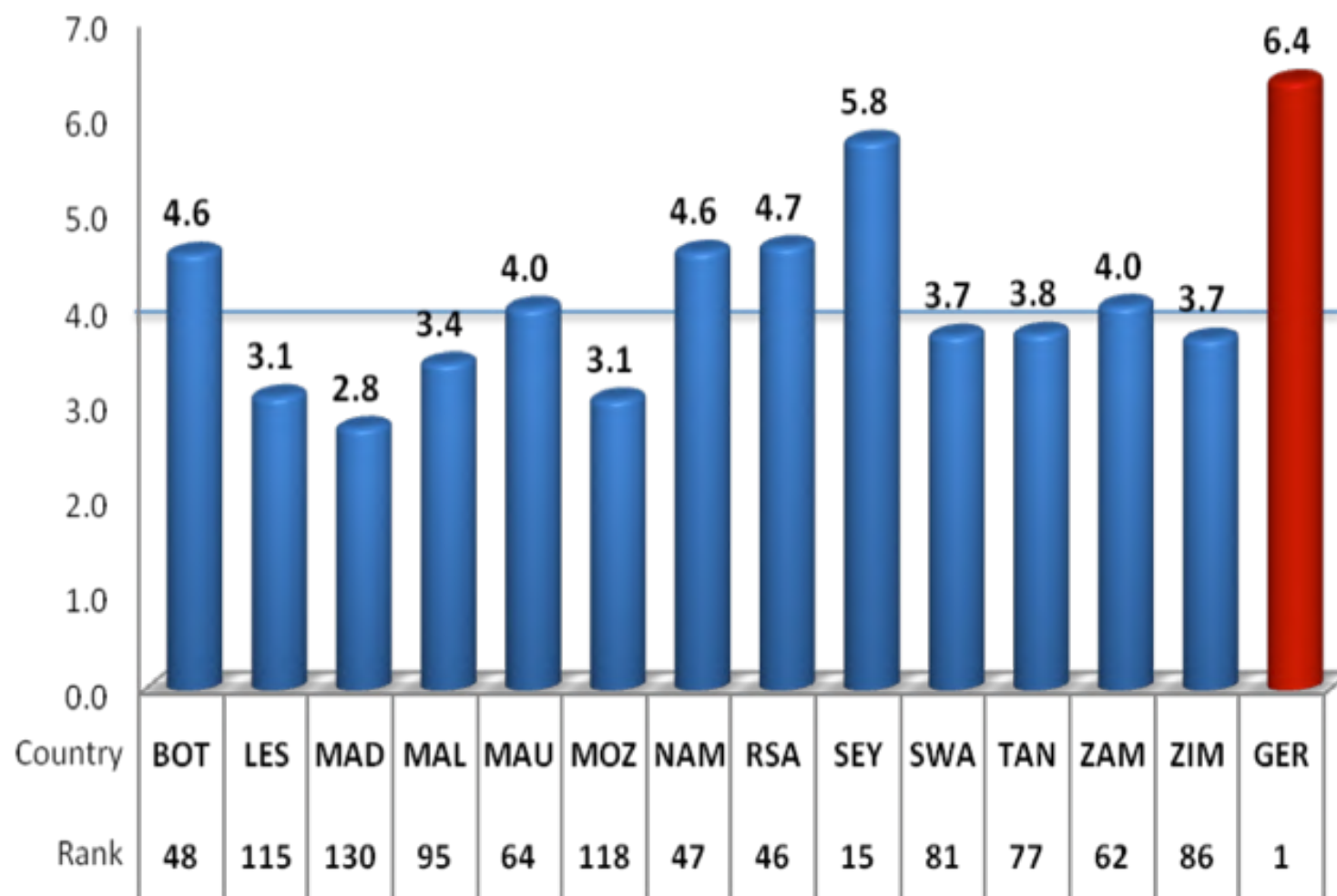


Executive Opinion Survey:
 “How would you assess the effectiveness of your government’s efforts to ensure that the T&T sector is being developed in a sustainable way?” [1 = very ineffective, 7 = very effective]
 2011–2012 weighted average.
 WEF 2013



Environmental regulation not stringent in most SADC countries

WEF Travel & Tourism Competitiveness Index 2013

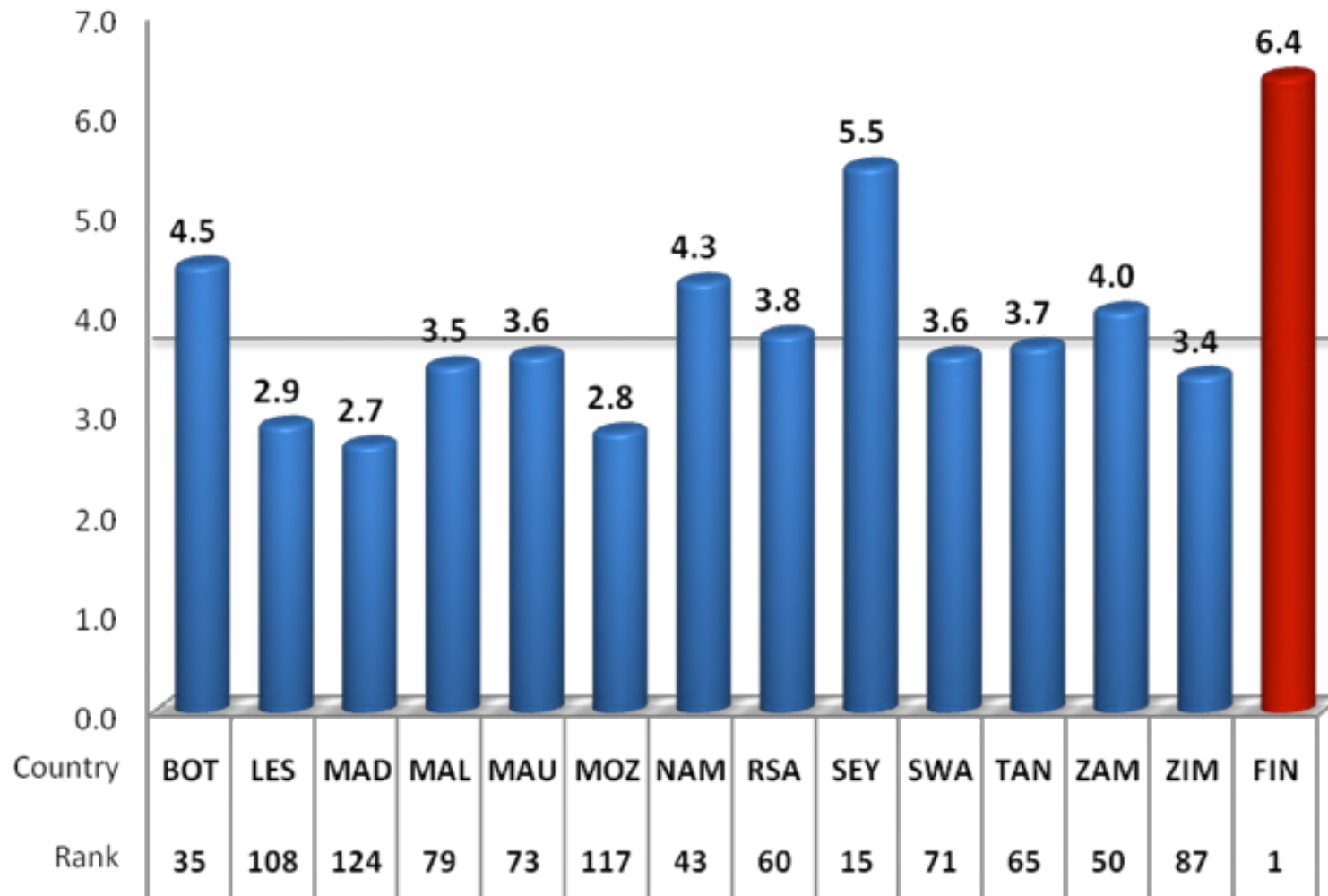


Executive Opinion Survey:
 “How would you assess the stringency of your country’s environmental regulations?” [1 = very lax; 7 = the world’s most stringent]
 2011–2012 weighted average (WEF 2013)



Enforcement of environmental regulation too lax in SADC states

WEF Travel & Tourism Competitiveness Index 2013

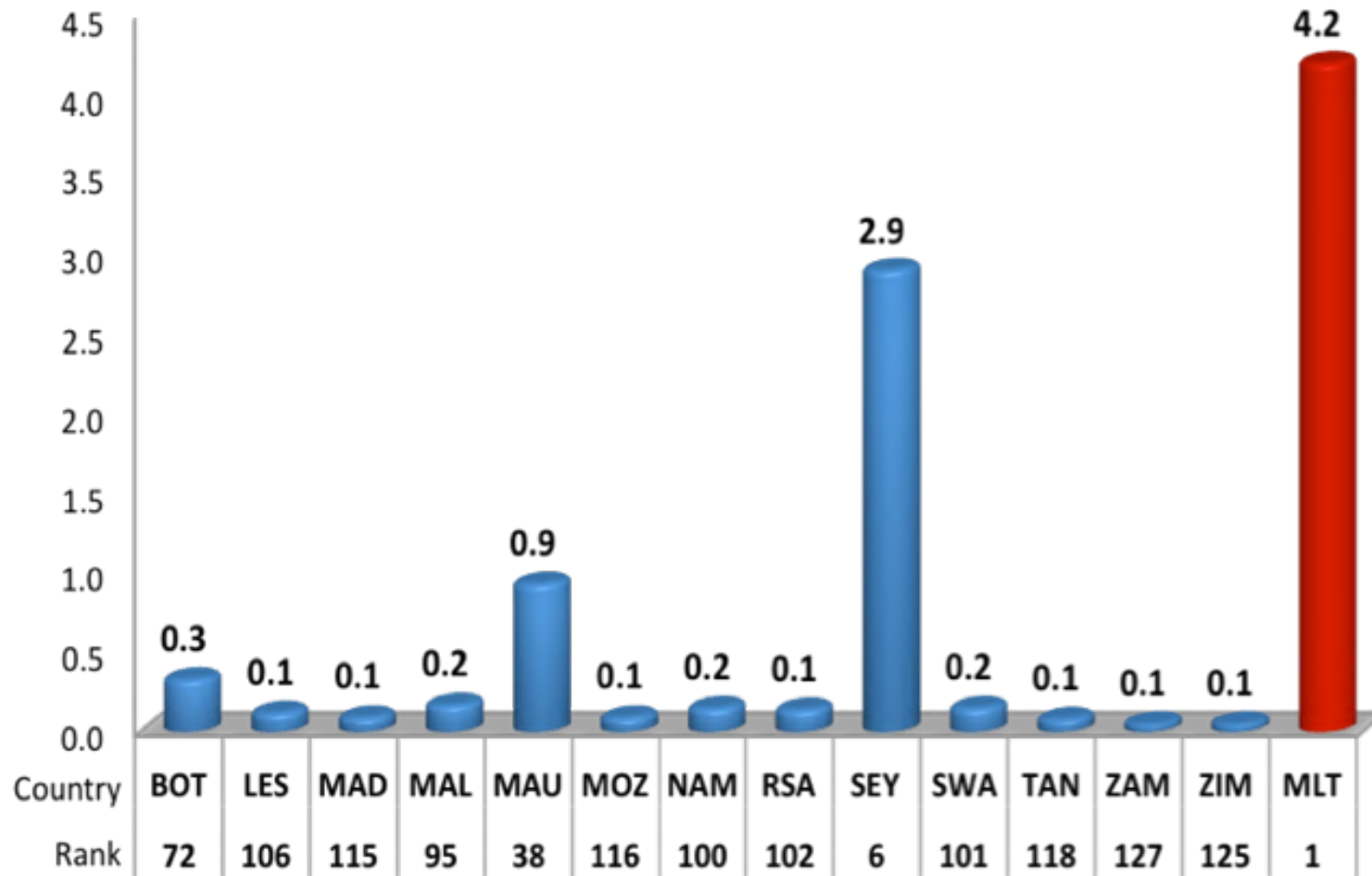


Executive Opinion Survey
 “How would you assess the enforcement of environmental regulations in your country?” [1 = very lax; 7 = among the world’s most rigorous] | 2011–2012 weighted average (WEF 2013)



Availability of hotel rooms: Supply shortages in most SADC states

WEF Travel & Tourism Competitiveness Index 2013

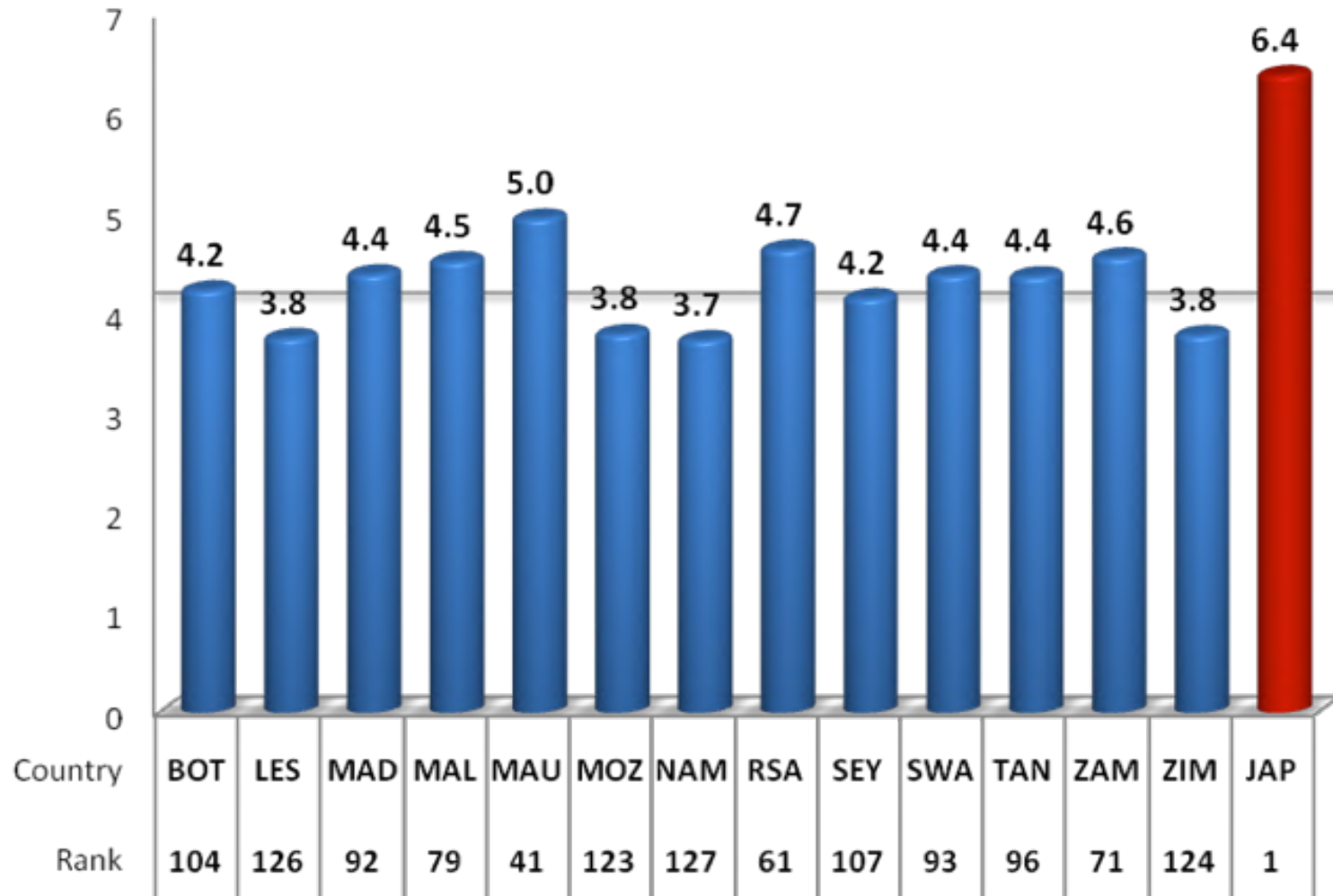


Number of hotel rooms per 100 population in SADC states
World Tourism Organization (WEF 2013)



Customer orientation is not a strength in most SADC countries

WEF Travel & Tourism Competitiveness Index 2013



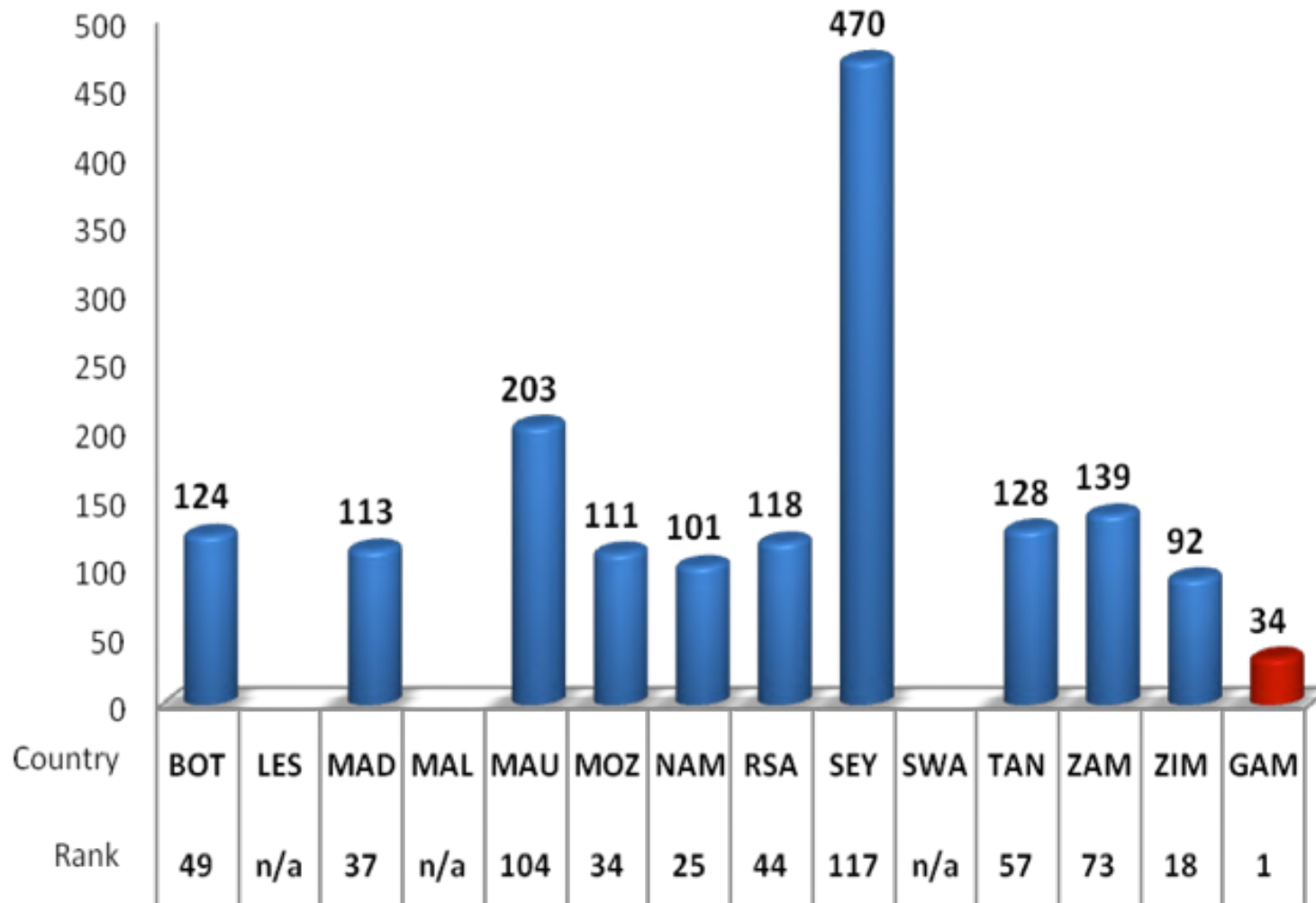
Executive Opinion Survey: “How well do companies in your country treat customers?” [1 = generally treat their customers badly; 7 = are highly responsive to customers and seek customer retention] | 2011–2012 weighted average. (WEF 2013)



in some SADC countries, hotel room prices are not the most

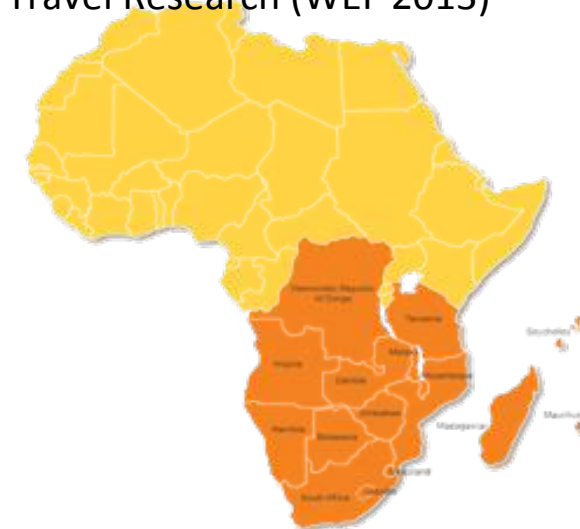
competitive

WEF Travel & Tourism Competitiveness Index 2013



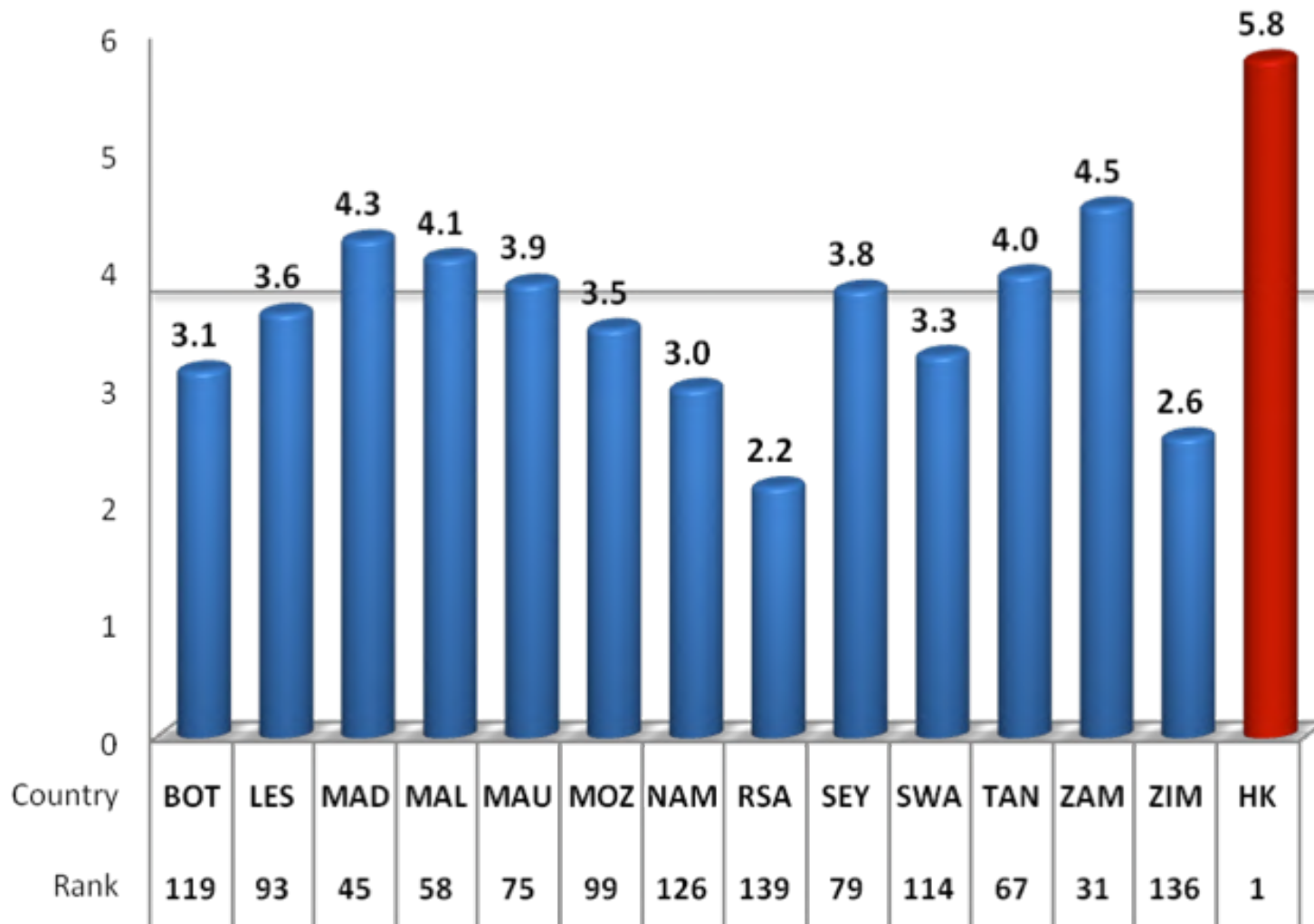
The average price is calculated for first-class branded hotels for calendar year (in US dollars) | 2012

This index measures the average price, in US dollars, of first-class hotel accommodation in each country. The index is calculated by using the average room rate in 2011. Source: Deloitte-STR Global and Smith Travel Research (WEF 2013)



Hiring and firing practices reflect the inflexibility of labour markets

WEF Travel & Tourism Competitiveness Index 2013

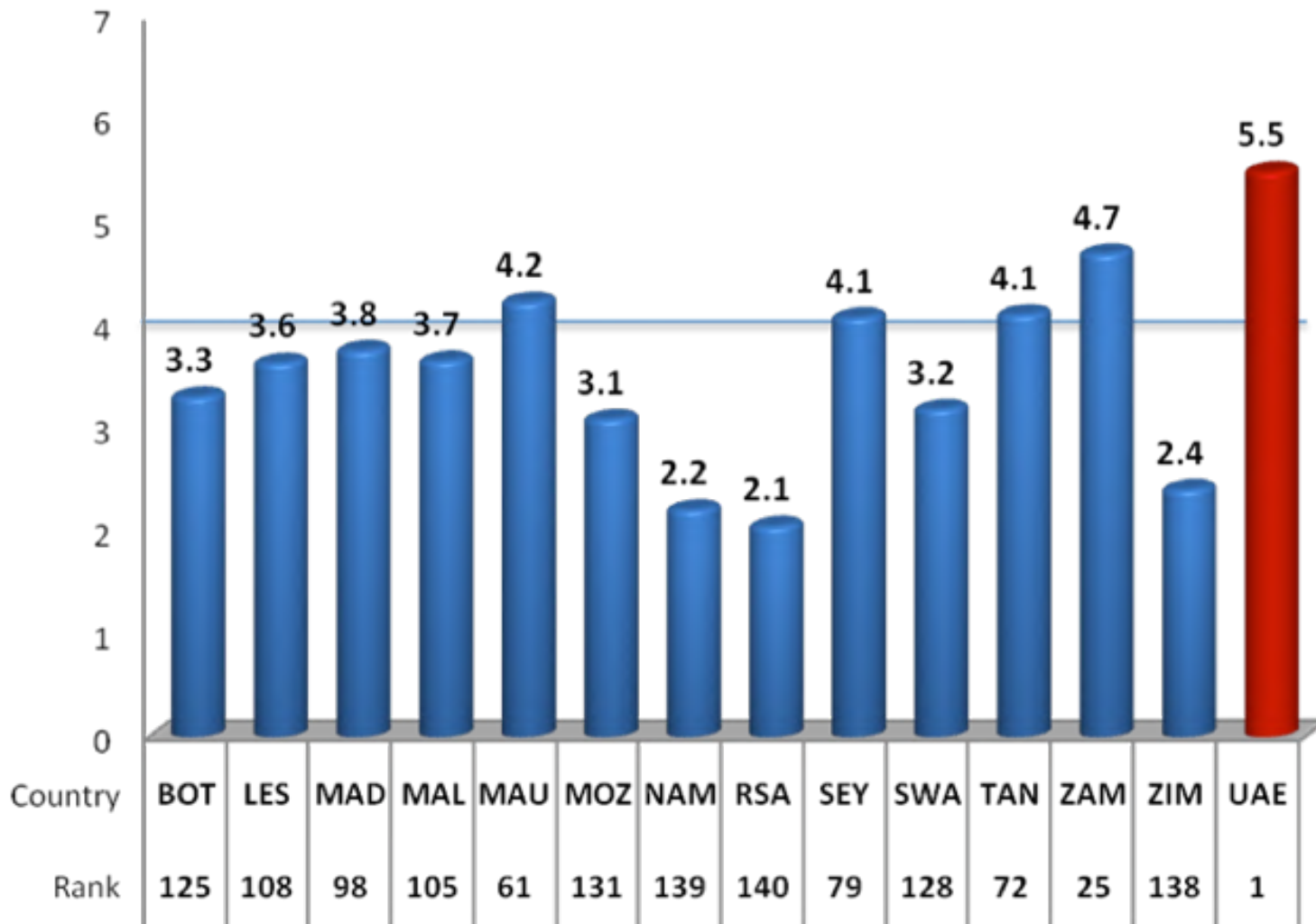


Executive Opinion Survey:
 “How would you characterize the hiring and firing of workers in your country?”
 [1 = impeded by regulations; 7 = flexibly determined by employers] | 2011–2012 weighted average. Source: World Economic Forum (WEF 2013)



Most SADC countries make it difficult to hire foreign labour

WEF Travel & Tourism Competitiveness Index 2013

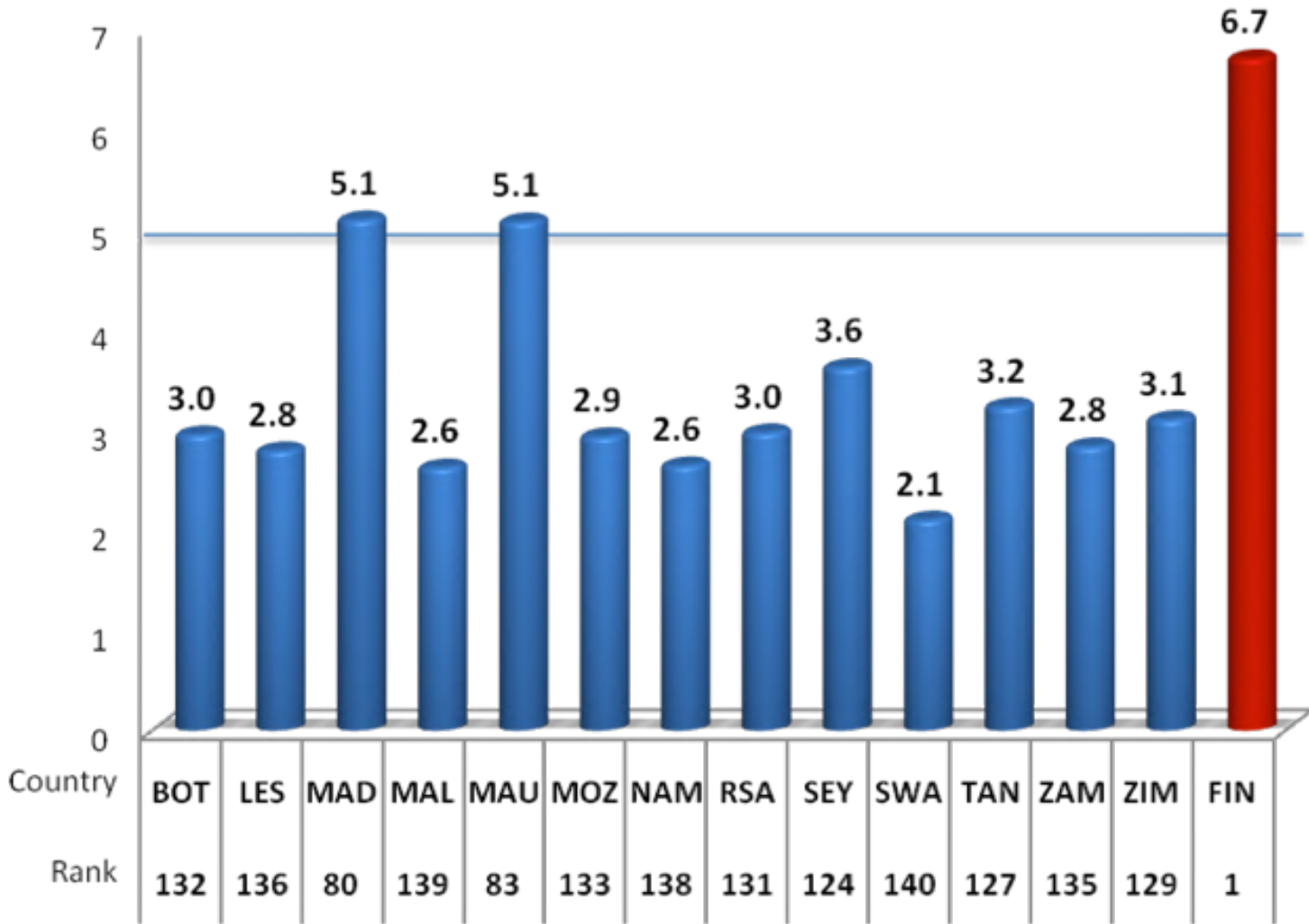


Executive Opinion Survey: “To what extent does labor regulation in your country limit the ability to hire foreign labor?” [1 = very much; 7 = does not limit hiring foreign labor at all] | 2011–2012 weighted average. Source: World Economic Forum. (WEF 2013)



HIV/AIDS expected to have a severe impact on tourism businesses in SADC

WEF Travel & Tourism Competitiveness Index 2013



Executive Opinion Survey
 “How serious an impact do you consider HIV will have on your company in the next five years?” [1 = a serious impact; 7 = no impact at all] | 2011–2012 weighted average. (WEF 2013)



Tourism companies in SADC countries should invest more in

staff training

Executive Opinion Survey
 “To what extent do companies in your country invest in training and employee development?”
 [1 = hardly at all; 7 = to a great extent] | 2011–2012 weighted average. (WEF 2013)



High business costs of crime and violence in some SADC countries

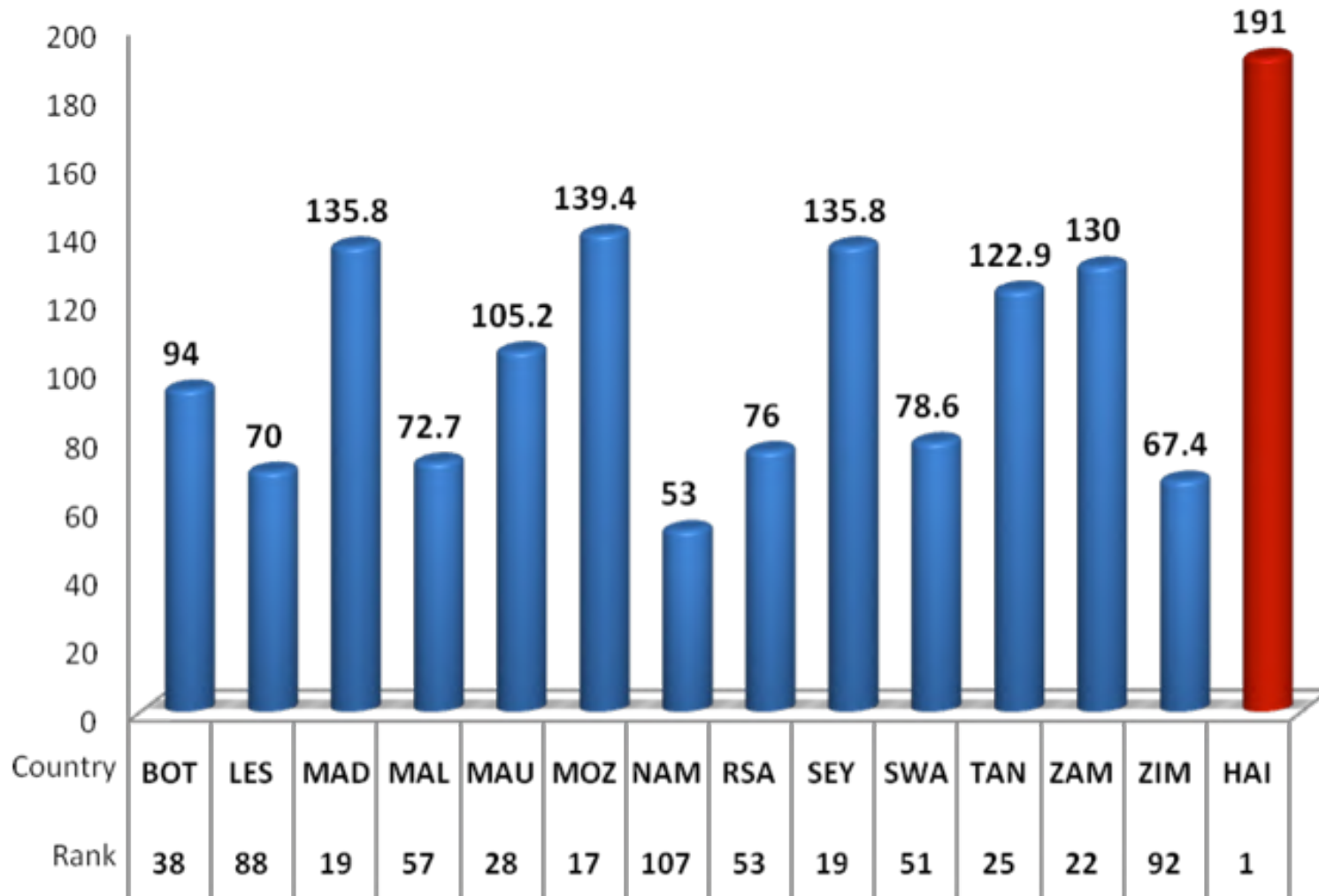


Executive Opinion Survey:
“To what extent does the incidence of crime and violence impose costs on businesses in your country?”
 [1 = to a great extent; 7 = not at all] | 2011–2012 weighted average (WEF 2013)



Visa policies of some SADC states make tourist visits cumbersome

WEF Travel & Tourism Competitiveness Index 2013



Number of countries whose citizens are exempt from obtaining a visa [= 1], able to obtain one upon arrival [= 0.70], or obtain an electronic visa [= 0.50] out of all UN countries | 2012 (WEF 2013)



In some SADC countries, tourism development is not government priority



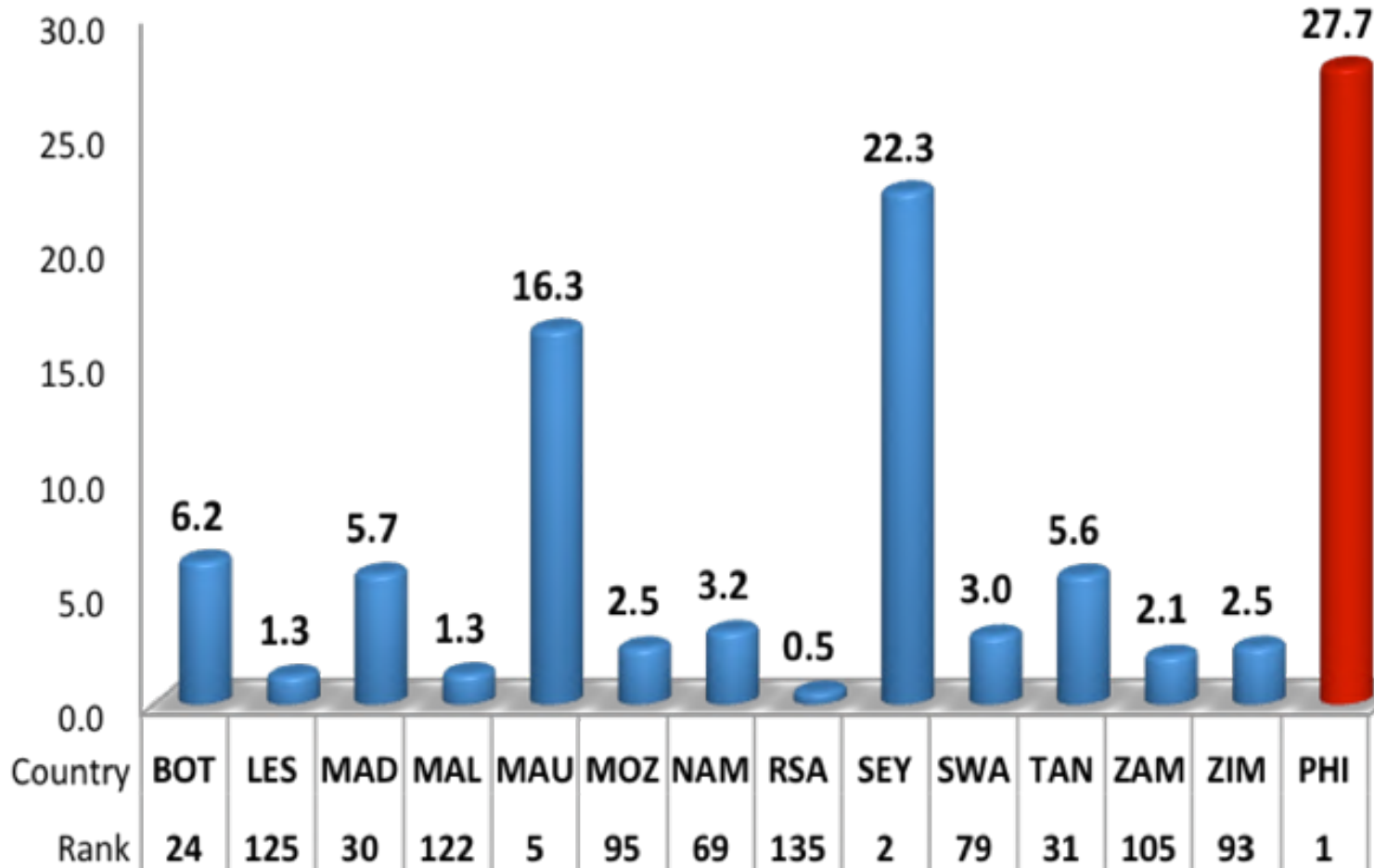
Executive Opinion Survey:
 “How much of a priority is the development of the T&T industry for the government of your country?” [1 = not a priority at all; 7 = a top priority] | 2011–2012 weighted average. Source: World Economic Forum (WEF 2013)



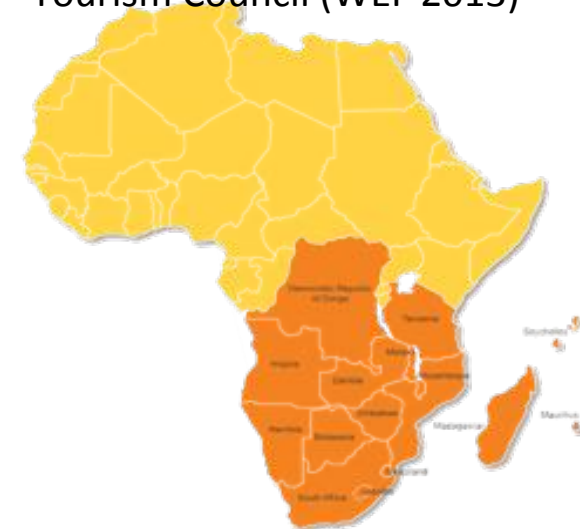
Government expenditure for tourism promotion is often too

small

WEF Travel & Tourism Competitiveness Index 2013

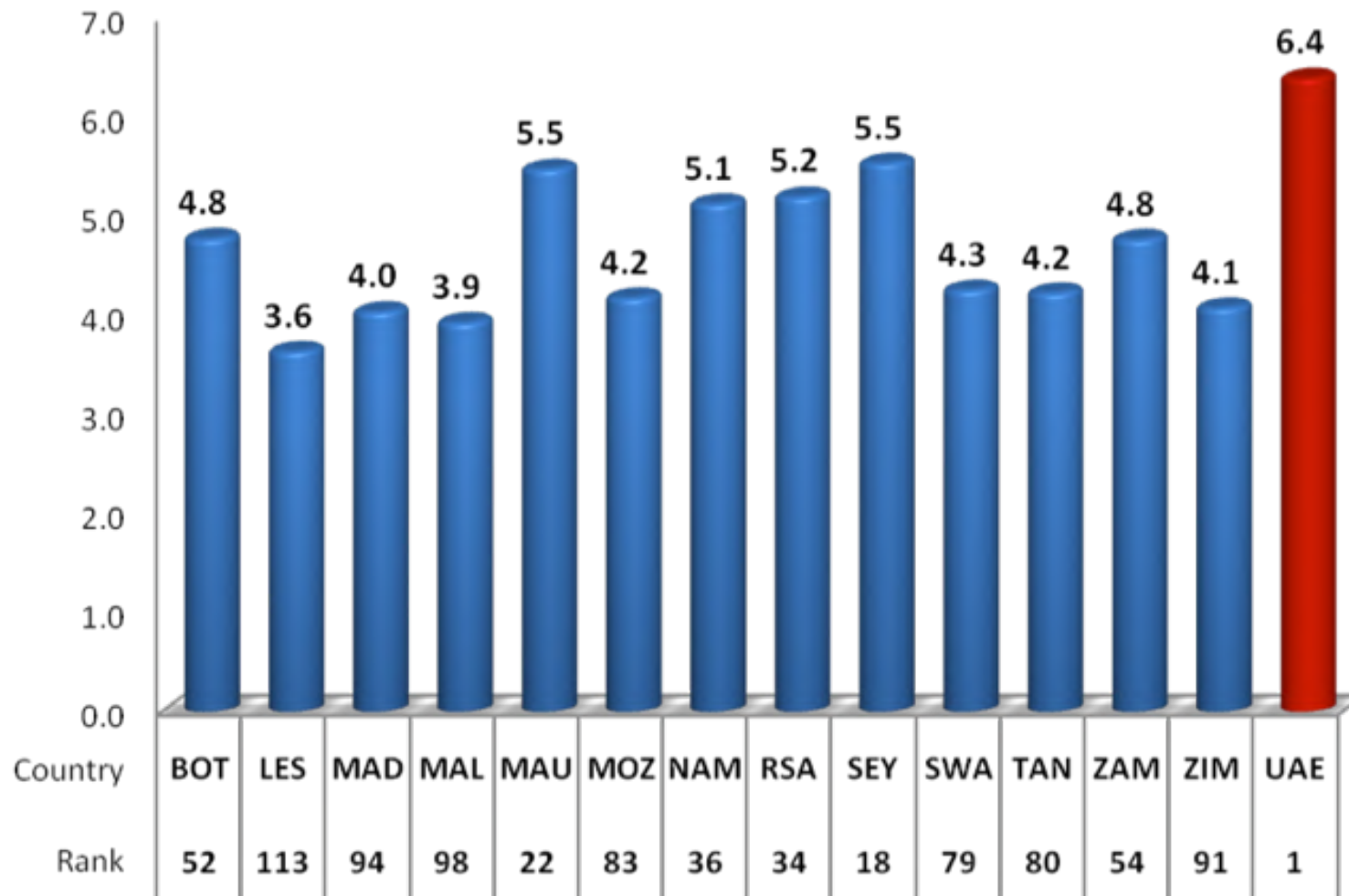


T&T government expenditure as a percentage of total government budget | 2011
 This measure includes expenditures (transfers or subsidies) made by government agencies to provide T&T services such as cultural (e.g. art museums), recreational (e.g. national parks), clearance (e.g., immigration/customs) to visitors. Source: World Travel & Tourism Council (WEF 2013)



Tourism marketing and branding are ineffective in some SADC states

WEF Travel & Tourism Competitiveness Index 2013



Executive Opinion Survey:
“How would you assess the effectiveness of your country’s marketing and branding campaigns to attract tourists?”
[1 = very ineffective; 7 = very effective] | 2011–2012 weighted average. Source: World Economic Forum (WEF 2013)





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