

Discussion Paper

Tourism and Poverty Reduction Strategies in the Integrated Framework for Least Developed Countries

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United Nations Development Programme

POVERTY REDUCTION



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United Nations Steering Committee on Tourism for Development



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List of acronyms and abbreviations

DTIS	Diagnostic Trade Integration Study
EIF	Enhanced Integrated Framework for Trade-Related Technical Assistance to Least Developed Countries
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
IF	Integrated Framework for Trade-Related Technical Assistance to Least Developed Countries
ILO	International Labour Organization
IMF	International Monetary Fund
IT	Information technology
ITC	International Trade Centre
LDCs	Least developed countries
MSMEs	Micro and small and medium enterprises
NGOs	Non-governmental organizations
SADC	Southern African Development Community
SCTD	Steering Committee on Tourism for Development
SMEs	Small and medium enterprises
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Education, Scientific and Cultural Organization
UNIDO	United Nations Industrial Development Organization
UNWTO	World Tourism Organization
WEF	World Economic Forum
WTO	World Trade Organization

Executive Summary

Over the past 50 years, international tourism has grown extraordinarily and it is now one of the most important industries in the world in employment creation and generation of foreign revenues. Tourism receipts for 2010 are expected to surpass the \$851 billion registered in 2009. The World Tourism Organization (UNWTO) estimates that by 2020 there will be 1.6 billion international tourist arrivals worldwide. Africa and Asia—the two regions with the most least developed countries (LDCs)—are expected to see 75 million and 416 million of these arrivals, respectively. Tourism destinations have diversified substantially and several LDCs are witnessing phenomenal growth in tourist arrivals and expenditure. International arrivals in LDCs increased by an average of 11 percent a year between 1990 and 2009. Tourism provides an important opportunity for LDCs to diversify their economies and integrate inclusive and pro-poor concerns into sectoral strategies. However, tourism development is not a panacea. The sector is extremely competitive and sensitive to external shocks ranging from economic downturns to natural disasters and political instability, although it does demonstrate strong resilience.

This study sheds light on how LDCs can maximize pro-poor gains from tourism. It analyses LDCs' tourism development aspirations as set out in the Diagnostic Trade Integration Studies (DTIS) that were completed under the Integrated Framework for Trade-Related Technical Assistance to Least Developed Countries (IF). The DTIS encompass a comprehensive review of LDCs' trade constraints, trade potential and the priority actions required to meet trade development needs in the overall context of national development and poverty reduction programmes. The DTIS represent a unique source of information on LDCs because they combine robust macroeconomic and sectoral analysis with stakeholder consultations and a participatory validation processes. Thirty-five DTIS were conducted between 2001 and 2009. Of these, 30 (86 percent) include a specific section dedicated to tourism with prioritized recommendations in an action matrix.

Most of the DTIS with tourism sections are not entirely successful in pointing the way toward scaled up and inclusive tourism development responses. Nonetheless, the presence of a tourism section or chapter is a reliable indication that the sector is a priority for the government and country as a whole. This is an important message for the development community, especially in view of the low priority traditionally assigned to the tourism sector in development cooperation.

The analysis

This study analyses the 30 DTIS that prioritize the tourism sector. The analysis is country-specific, focusing on three levels of interventions: policy and regulatory framework, institutional support and supply-side (enterprise) response. The analysis includes endogenous factors relevant for tourism development, such as capacities, supply chains, social and environmental sustainability, among others. These factors are grouped into 13 criteria, six of which are used as proxies for the poverty reduction orientation of the DTIS.

The first analytical step involved the extraction of details (in the form of actual narrative) from each DTIS. In the second step, these 'occurrences' were inserted into a matrix that visually reveals the adherence of the DTIS to the 13 criteria at the three intervention levels. In the third step, a composite matrix was created that summarizes the 30 individual country matrices. This allows for cross-country comparison. The fourth step was to summarize the country matrices and the comparative matrix and derive recommendations.

The analysis indicates that the DTIS focus significantly more attention on policy planning than institutional development. Supply-side/enterprise issues also receive considerable attention. There are far more policy occurrences across the DTIS than occurrences dealing with institutional support arrangements. Recommendations concerning enterprise issues fall between these two extremes.

This finding highlights the risk of over-reliance on enterprise, particularly inward investment and short-term measures, rather than prioritising interventions that enhance sustainability and inclusiveness. Policy statements on pro-poor strategies and provisions are

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rarely supported with suitable implementation arrangements. This is a recipe to entrench the enclave character of tourism in many of the countries surveyed.

Conclusions and recommendations

Tourism is a diverse and labour-intensive industry that provides a wide range of employment opportunities. Tourism is well placed to contribute to poverty reduction: because it is consumed at the point of intervention, even low-skilled workers in remote areas can become tourism exporters. However, converting comparative advantages into competitiveness and sustainability require not only a coherent policy framework and a dynamic private sector but also efficient institutions to translate policy measures into programmes. Additionally, a national tourism development strategy inevitably involves issues that extend far beyond the sector into cross-sectoral linkages. Integration within global tourism networks and practical actions to establish linkages with other sectors of the economy and along tourism value chains are key elements of pro-poor tourism development. This wider perspective is essential if tourism development is to positively affect inclusion and poverty reduction.

Governments must be aware of the impacts of different forms of tourism development and promote growth models with assumptions and implications that are fully understood. A pro-poor tourism approach entails targeted support programmes and increased community participation.

Countries must do more to address pro-poor concerns, gender issues and sustainability considerations in tourism development. Occurrences of the six criteria that were used as proxies for poverty reduction and inclusion indicate serious gaps in about half the DTIS examined. To overcome these shortcomings, the following considerations should be taken into account:

- The DTIS should provide more detailed analysis of tourism development's impact on poverty reduction and opportunities for inclusion, particularly for communities located close to tourism establishments.
- The lack of institutional backstopping in relation to the six core criteria or proxies indicates that a major effort is required to incorporate and internalize pro-poor objectives within public agencies and programmes.
- More information on gender participation in the tourism sector is needed to identify concrete actions for reducing participation gaps. The DTIS were particularly disappointing on this issue.
- The DTIS performed well in showing how to better connect vocational training and skill upgrading efforts with local employment opportunities.
- While the DTIS underscore the importance of social and environmental sustainability, they do not provide adequate information on ensuring the participation of local communities in the development and management of tourism development interventions.
- Appropriate forms of tourism development and preservation of environmental and cultural assets should proceed hand-in-hand. LDCs' most valuable assets are their immense natural and cultural resources. The DTIS are inconsistent in addressing how these assets should be preserved for future generations. More importantly, climate change issues and innovations in green technologies and architecture do not feature in DTIS discussions.
- Security and political stability, while only partially referenced by most DTIS, are key factors in building a positive country image and attracting foreign and domestic investment for tourism development. For post-conflict countries, the perception of risk might be disproportionate to actual conditions in the country. Countries must adequately address this issue. Security is a fundamental prerequisite for tourism.

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- The DTIS do not pay sufficient attention to quality and (national or international) standards. A systematic approach toward building a client-oriented culture, supported by industry and labour standards and monitoring and compliance systems, is lacking.
- The tourism sector requires a wide spectrum of skills although it also provides opportunities for the unskilled. The need for training and skill development through domestic providers and in partnership with global chains or regional vocational centres is critical and requires more emphasis.
- The tourism sector is sensitive to various external shocks. The 2007–2009 global recession is a case in point. Contingency considerations for dealing with shocks do not feature strongly in the DTIS. Different tourism products and source markets might mean different levels of resilience toward external shocks.
- While many LDCs are competitors in the tourism market, cooperation is also possible. Tourism's regional dimensions are clear in the DTIS of Mozambique and other Southern African Development Community (SADC) countries that established a regional organization mandated to promote tourism. Future DTIS should focus additional attention on this issue.

Under the Enhanced Integrated Framework (EIF), a number of countries will prepare DTIS updates, and new entrants will undertake diagnostic exercises. DTIS preparations should highlight pro-poor measures, which can have a positive impact on human development. Analysis and recommendations should not only focus on increasing overall competitiveness and productivity but also on promoting sustainability and inclusion. Intuitively, tourism development is expected to help fight poverty but the link is neither automatic nor straightforward. Gender, income generation, employment, and opportunities for youth must be taken fully into account. There is much room for improvement in future DTIS.

1. INTRODUCTION

Over the past 50 years, international tourism has grown at an extraordinary rate. It is now one of the most important industries in the world in terms of employment creation and generation of foreign revenues. International tourism recovered faster than anticipated from the impacts of the global financial crisis and economic recession of 2007 to 2009: in 2010, there were 935 million international tourist arrivals worldwide. This represents an increase of 58 million (6.7 percent) from 2009 and an increase of 22 million (2.4 percent) from the pre-crisis peak in 2008. International tourism receipts for 2010 will likely surpass the \$851 billion registered in 2009. Approximately \$2.3 billion per day was spent worldwide on tourism activities in 2010. In 2011, global tourism is expected to grow at a rate of 4 to 5 percent. The World Tourism Organization (UNWTO) estimates that by 2020 there will be 1.6 billion international tourist arrivals worldwide. Seventy-five million of these will occur in Africa and 416 million in Asia — the two regions with the great number of least developed countries (LDCs). Additional data on recent trends in the global tourism sector is presented in Annex 1.

While developed economies remain both the major tourism destinations and source of international tourism, developing countries are quickly catching up. In recent decades there has been a substantial diversification in international tourism destinations, and several LDCs have registered phenomenal growth in tourist arrivals and expenditure. International arrivals in LDCs increased by an average of 11 percent a year between 1990 and 2009. This trend is likely to continue, indicating that LDCs will be among the major players in international tourism in the coming years. Tourism growth rates in developing countries now outperform those in developed economies. International institutions and national governments increasingly recognize the potential for tourism to play a significant role in the socio-economic development of LDCs.

Tourism provides an important opportunity for LDCs to combat poverty, diversify their economies and pursue pro-poor inclusive growth strategies. The growing market trend of tourists seeking cultural and natural attractions in rural areas gives LDCs a strong comparative advantage. This trend is particularly relevant to LDCs since three quarters of people in extreme poverty live in rural areas.

Tourism is better placed than many sectors to address the needs of the poor. Because tourism is consumed at the point of intervention, even low-skilled workers in remote areas can become tourism exporters. Tourism is a diverse and labour-intensive industry and provides a wide range of employment opportunities. Tourism employs more women and young people than most industries, resulting in increased incomes, empowerment and social inclusion. Tourism's capacity to generate employment is particularly important in LDCs given the overall low level of education and skills among local populations. As an industry where entry barriers can be low or easily lowered, tourism creates opportunities for small entrepreneurs and allows poor people to establish new activities or formalize existing micro-ventures.

Taxes and levies on tourism income can be used by governments for poverty reduction purposes. Tourism requires relatively less investment (it uses readily available natural and cultural attractions) than other industries and the requisite infrastructure and superstructure can benefit both tourists and local populations. Tourism is also one of the few sectors with a wide range of upstream and downstream effects on other economic activities, due to its large and diversified supply chain. Finally, tourism provides an opportunity to support traditional lifestyles and maintain traditional architectural and building styles. Tourism is a powerful engine for socio-economic development and an instrument to safeguard biodiversity and cultural heritage, especially in LDCs.

Table 1 provides an overview of the status of tourism in LDCs, measured by the contribution of the sector to foreign exchange earnings.

Tourism development is not a panacea for LDCs. The sector is extremely competitive and vulnerable to external negative impacts (natural and human-made), although it does demonstrate strong resilience. LDCs have weak capacities, which impact all aspects of tourism development, including planning, legislation, accessibility, marketing and promotion, product development, standards,

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Table 1: Classification of LDCs according to the importance of the tourism sector in their balance of payments (gross tourism earnings in percentage of total exports of goods and services in 2008)

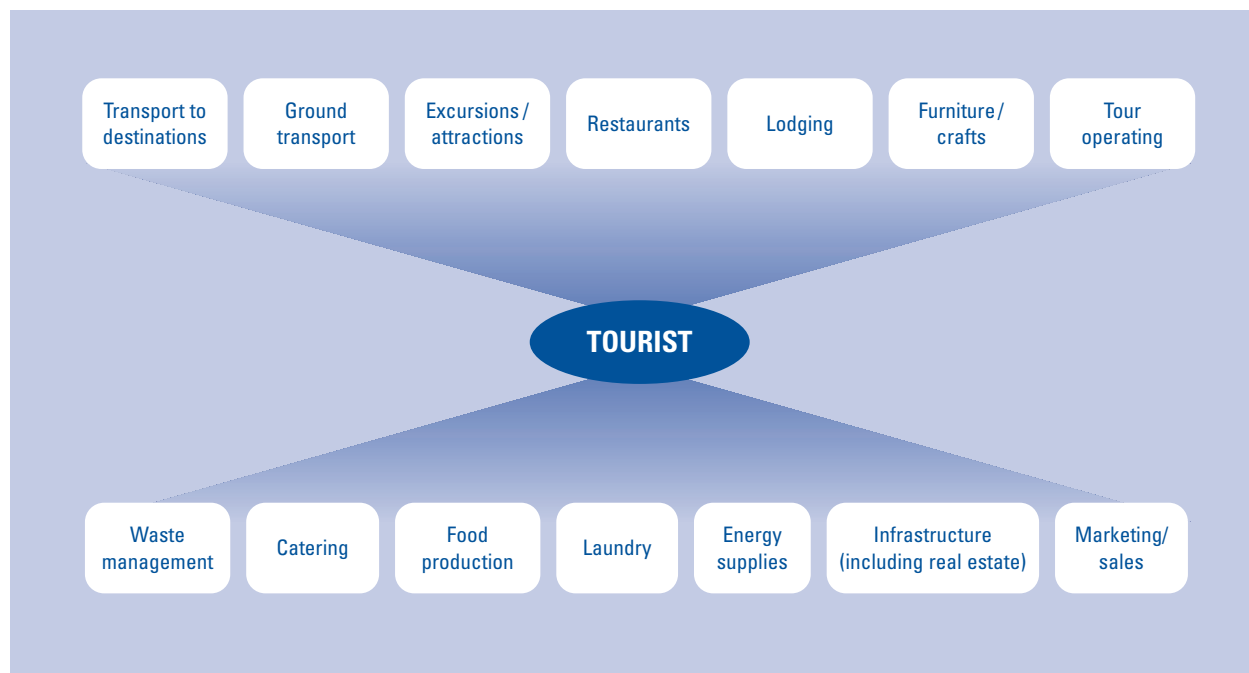
LDCs in which tourism remained or became the largest export sector, 2000–2008	LDCs in which tourism remained or became the second or third largest export sector, 2000–2008	LDCs with a comparatively smaller tourism sector, but demonstrating progress in tourism performance, 2000–2008	LDCs without significant tourism up to 2008
Maldives (76.6)	Sao Tome & Príncipe (34.7)	Sierra Leone (10.4)	Guinea-Bissau (1.1)
Samoa (69.8)	Haiti (33.5)	Kiribati (6.3)	Burundi (1.0)
Vanuatu (52.1)	Liberia (25.5)	Lao PDR (5.4)	Solomon Islands (0.7)
Eritrea (51.4)	Cambodia (19.2)	Niger (5.2)	Angola (0.4)
Comoros (42.6)	Benin (15.3)	Togo (3.8)	Afghanistan (...)
Tuvalu (34.8)	Madagascar (12.1)	Malawi (3.6)	Central African Republic (...)
Gambia (32.8)	Mali (11.5)	Lesotho (3.5)	Chad (...)
Rwanda (30.4)	Ethiopia (10.7)	Zambia (2.8)	Congo (Dem. Rep. of the) (...)
Tanzania (26.0)	Yemen (8.7)	Djibouti (2.1)	Equatorial Guinea (...)
Uganda (20.0)	Mozambique (5.9)	Myanmar (0.8)	Guinea (...)
Nepal (19.6)	Sudan (2.7)	Bangladesh (0.5)	Somalia (...)
Senegal (18.7)		Bhutan (...)	Timor-Leste (...)
		Burkina Faso (...)	
		Mauritania (...)	

Source: UNCTAD, 2010. Calculations based on data from UNCTAD's Division for Africa, Least Developed Countries and Special Programmes; the International Monetary Fund; and national sources (www.unctad.org/sections/home/docs/hl0152_sharetourismexports2008_en.pdf).

investment, heritage conservation and preservation. It is essential that tourism-related policies and measures are in place to ensure pro-poor benefits and respond to the imperatives of sustainability and competitiveness.

Understanding the tourism value chain is the key to unlocking this challenge. It is vital for policy makers to design and implement policies that will maximize the realization of potential gains along the tourism value chain. In particular, policies and strategies are required to enhance the participation of the poor both in employment and income generating activities since the indirect impact of hotels and resorts in the host economy often brings the highest benefits. While the poor can aspire to direct employment in the tourism sector, the development of related subsectors such as transportation, restaurants, construction, leisure, heritage, arts, craft, tours, as well as fishery, agricultural and horticultural production can act as multipliers. Figure 1 presents an overview of the tourism value chain and related subsectors.

Figure 1: Tourism value chain



Source: World Economic Forum, 2009.

The study

To shed light on how LDCs can maximize pro-poor gains from tourism, this study analyses LDCs' tourism development patterns revealed in the Diagnostic Trade Integration Studies (DTIS) carried out under the Integrated Framework for Trade-Related Technical Assistance to Least Developed Countries (IF).¹ The IF is a multilateral programme to support LDCs' trade development. DTIS evaluate country-specific trade constraints, trade potential and the priority actions required to meet trade development needs in the overall context of national development and poverty reduction programmes. Following a robust participatory process, the primary stakeholders from the private sector and civil society validate the DTIS. The DTIS is then formally adopted by the government as a main pillar of trade and development policy to support economic growth and poverty reduction strategies. The DTIS thus provide both an assessment of the status of trade in a particular country and a set of prioritized recommendations.²

Thirty-five countries conducted DTIS between 2001 and 2009. Of these, 30 (86 percent) included a specific section dedicated to tourism (see Annex 2). The presence of a tourism section or chapter in a DTIS is a reliable indication that the development of the tourism sector is a national priority. The recommendations in the DTIS action matrix detail the prioritized interventions to be pursued by the government. The matrix also highlights areas that require the support of development partners to achieve results. The analysis

1 In 2008, the IF was enhanced in terms of resources and organizational structure to become the Enhanced Integrated Framework (EIF). More information on the EIF and DTIS is available at the Enhanced Integrated Framework Web site: www.enhancedif.org

2 The DTIS template can be accessed at the EIF Web site: www.enhancedif.org/documents/EIF%20toolbox/DTIS%20template.pdf. Although there is no specific reference to tourism in the template, the sector can be addressed in Part IV (Sectoral Studies) if prioritized by the government.

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is country-specific and accounts for endogenous factors relevant to tourism development, such as transport infrastructure and services, capacities, backward business linkages, country image, marketing strategy, and social and environmental sustainability.

Tourism and Poverty Reduction Strategies in the Integrated Framework for Least Developed Countries explores how LDCs can maximize pro-poor gains from their tourism sectors. It is organized into five chapters. Following the Introduction in Chapter 1, Chapter 2 describes the study's analytical framework and methodology. Chapter 3 presents the main findings. Chapter 4 provides further observations on the main findings. Chapter 5 advances recommendations for LDCs, including how to approach the analysis of tourism development from a pro-poor perspective in the next generation of DTIS or DTIS updates.

The findings of this study are intended to provide a basis for deliberations at a forum organized under the umbrella of the Steering Committee on Tourism for Development (SCTD)³ by UNDP in partnership with the UNWTO, International Labour Organization (ILO), International Trade Centre (ITC), United Nations Conference on Trade and Development (UNCTAD), the World Trade Organization (WTO) and the Enhanced Integrated Framework (EIF) Secretariat at the 4th United Nations Conference on Least Developed Countries (LDC IV) in Istanbul, Turkey in May 2011.⁴

2. ANALYTICAL FRAMEWORK

This study analyses the extent to which the DTIS focus on maximizing tourism sector gains in a manner that is competitive and sustainable and yields pro-poor benefits.⁵ The UNWTO defines sustainable tourism as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments.

The transmission channels through which the poor can benefit directly or indirectly from tourism development are illustrated in Box 1, which outlines seven 'sustainable tourism-eliminating poverty' (ST-EP) mechanisms.

Methodology

The methodology followed in this study evaluates the DTIS on three levels of intervention: policy, institutions and supply side (enterprise). The methodology is specific to the present study; it is not normally applied in the preparation of a DTIS.

Intervention on each level—policy, institutions and supply side—plays a significant role in the development of the tourism sector. Policy interventions alone cannot translate private sector initiatives and investments into actual supply capacities: the corresponding institutional set-ups, implementation and coordination mechanisms are equally important. The three-level analysis is essential to assess whether the recommendations in the DTIS are consistent with pro-poor objectives.

The study's three-level analysis is complemented by the application of a common set of criteria that are important drivers in the development of the tourism sector. There are 13 criteria in total and they all draw upon endogenous factors. An elaboration of the three levels of intervention and the 13 complementary criteria follows.

3 In 2010 the Steering Committee on Tourism for Development was established under the aegis of UNWTO to coordinate the tourism-related work of UN agencies.

4 www.un.org/wcm/content/site/ldc/home

5 The methodology is adapted from a previous UNDP study, "Commodity Development Strategies in the Integrated Framework," UNDP 2009.

BOX 1: HOW TOURISM CAN BENEFIT THE POOR – THE ST-EP SEVEN MECHANISMS

1. Employment of the poor in tourism enterprises

This mechanism involves undertaking measures to increase employment in tourism enterprises. It is important that the provision of education and training is strengthened so that the poor may respond to employment opportunities, and any social or cultural barriers are eliminated.

2. Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor

One of the fundamental conditions to achieving poverty reduction is to ensure that as much as possible, goods and services in the tourism supply chain come from local sources at all stages. The objective is to maximise the proportion of tourism spending that is retained in local communities and to involve the poor in the supply process. This also helps to support traditional forms of rural activities and skills, enhance the quality and identity of the local tourism product and establish stable sources for business.

3. Direct sales of goods and services to visitors by the poor (informal economy)

One of the main ways in which poor people seek to earn income from tourists is through selling produce and services, such as fruits, handicrafts or guided tours, directly to them. Where visitors engage in the informal economy, it can be a direct route to providing income to the poor, and it can provide visitors with a colourful and rewarding experience. Information provision to tourists on available local products is important, as well as training to local people to ensure their products meet the quality requirements of visitors.

4. Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises (MSMEs), or community based enterprises (formal economy)

This involves the establishment and management of formal tourism enterprises by the poor, either individually or at a community level. These may include accommodation establishments, catering, transport, retail outlets, guiding and entertainment. Advantages of enterprise formation at the local level are that it places power and control in the hands of the local people, it can guarantee investments for the longer term and it enables enterprises to establish a scale of operation needed to attract customers.

5. Tax or levy on tourism income or profits with proceeds benefiting the poor

This mechanism relates to the revenues that are earned by national or local government from tourism, which can be used to fund social programmes. It has the advantage that all of the poor can benefit from tourism without being directly engaged in the sector. The extent to which state revenue earned from tourism is put towards poverty reduction will depend on national priorities and programmes. Taxes or levies raised locally, for example through levies on bed-nights or entrance fees for protected areas, can often be used fully or partly for community benefits. Transparency in the application of local taxes is essential, as well as consultation with the private sector to avoid deterring the industry and travellers by imposing relatively high taxation levels.

6. Voluntary giving/support by tourism enterprises and tourists

Voluntary support in money or in kind, given by visitors or tourism enterprises to the poor can act as influential drivers for local poverty reduction. Various studies have pointed to a willingness amongst tourists to give something back to the area they are visiting. Many tourism enterprises are also committed to provide sponsorship to development initiative in the areas where they operate. Local NGOs or trusts may help develop mechanisms for the collection and distribution of donations. Beneficiary schemes clearly showing tangible local impact and community involvement have a high chance of attracting sponsorship and visitor support.

7. Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors

Tourism development, particularly in a new, remote or rural location, can include investment in new infrastructure, such as roads, water and energy supply, sanitation and communications. With careful planning, such infrastructure can also bring positive benefits to the poor, by providing them with basic services and opening up new and faster routes to access markets. The main challenge is to make sure that new tourism development is not consuming resources at the expense of local communities, but rather offering them the chance to gain new access to infrastructure.

Source: UNWTO, *Sustainable Tourism – Eliminating Poverty (ST-EP) Programme*.

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Levels of intervention

- **Policy and regulatory framework.** Policy makers set the stage for tourism development through appropriate regulatory regimes, such as simple tourism arrival requirements or policies that facilitate investments (domestic and foreign). To achieve the objective of poverty reduction, government policies must leverage opportunities to promote employment and other income generating activities, and ensure that local enterprises are competitive. A participatory process involving stakeholders from civil society and the public and private sectors fosters adherence to the policy and commitment to its implementation. Particularly in the LDC context, it is imperative to identify the bottlenecks and challenges. An analysis of the DTIS from a policy perspective will reveal the overriding issues that require follow-up action through a coherent national approach.
- **Institutional set-up.** A supportive institutional infrastructure, ranging from banks to hotel accreditation, tourism promotion, marketing boards, MSME support, and food safety regulation, plays an important role in tourism development by providing the means of implementing and coordinating policies that directly benefit tourism enterprises. If institutional mechanisms are absent, inadequate, or lack capacity—a perennial LDC challenge—the policy framework cannot be fully realized. Close consultation and collaboration between the government and the private sector and other stakeholders is required to facilitate the functioning of a supportive institutional infrastructure. Certain institutional arrangements such as tourism promotion and marketing boards may be established as public-private partnerships.
- **Supply side/enterprise.** Governments can establish enabling policy and institutional frameworks, but the burden of carrying through with these measures and achieving increasing levels of competitiveness rests with the private sector, enterprises and workers. Dynamic and proactive enterprises with linkages in local and global markets are critical if tourism is to contribute to welfare gains and inclusion. The backward linkages established by foreign direct investment (FDI) are one of the channels through which local communities can benefit from tourism development. Domestic investment can be an equally important driver of tourism development. The supply response also depends on available assets, which might belong to enterprises, communities or the state and include natural and cultural resources. Enterprise capacity, particularly of MSMEs and the informal sector, is another major challenge in the LDC context.

Criteria and their rationale

Complementing the three levels of analysis is a set of 13 criteria that are relevant for achieving a competitive and sustainable tourism industry. Of the 13, six are 'core issues' in the contribution of tourism development to addressing pro-poor concerns and poverty reduction. The use of these six criteria as proxies for poverty reduction concerns can only provide a rough indication of the extent to which pro-poor interventions and considerations are integrated into the DTIS tourism discussion. The six proxies also do not necessarily provide a basis for the prioritization or sequencing of interventions. In some countries, investing in key tourism infrastructure and addressing security considerations are essential preconditions for pro-poor development interventions that bring lasting results. Moreover, the use of public revenue from tourism receipts in pro-poor public expenditures must be empirically verified in each country-specific context. Such a verification falls outside the scope of this study.

The 13 criteria are divided into two groups. The first group comprises general criteria required to establish an enabling environment for tourism development. The second group contains the six criteria that directly address poverty reduction.

Group 1 criteria: Establishing an enabling environment for tourism development

1. **Transport infrastructure.** High transportation costs affect competitiveness, especially in landlocked countries and small island states. Transport costs and quality of infrastructure are of particular concern to the tourism sector in LDCs. Lack of quality airport infrastructure, roads, rail, and port services affect tourism arrivals and movement within a country. Poor transport infrastructure also impedes the development of the tourism value chain, including food and crafts.
2. **Public utilities.** Reliable energy and water supply and access to other basic utilities at affordable rates are vital for the tourism sector. For sustainability reasons, it is essential that utility usage by the tourism sector does not compromise supply availability and affordability for local populations.
3. **Information technology (IT) and telecommunication infrastructure.** IT and telecommunications are essential tools for tourism. They put tourism enterprises in touch with their customers (see country image and marketing strategy below) and provide vital information for planning a visit, from facilities and tours to weather conditions. In this age of disintermediation where tourism suppliers are expected to communicate directly with potential consumers, good IT facilities (and knowledge of how to use them) are essential. Equally, tourists expect reliable internet access and wireless telephony during their travels.
4. **Tourism infrastructure and services.** The quality and availability of tourism infrastructure and services are essential as tourists are increasingly conscious of value for money in selecting distinctive holiday experiences. Factors to consider include the number of beds available in different categories of hotels and other accommodation, and the availability of tourism attractions, services and products, including sports facilities and tours.
5. **Safety, security and medical services.** Safety — both real and perceived — and knowledge of an accepted level of risk are essential for successful tourism sectors. Safety and security concerns encompass issues ranging from the general security and the political situation in the country, to the risk of natural disasters, the crime rate and the general physical inviolability of tourists. Availability of medical services for emergency situations is also important. Medical tourism, where the destination offers access to high quality medical or convalescent care, has become niche market in several countries.
6. **Hotel accreditation and standards.** With increasing competition and requisite awareness amongst tourists, meeting international quality standards is a sine qua non. An internationally recognized official classification scheme and other standards covering hotels and lodges facilitate the provision of information to customers and is a precondition for participating in international networks. Quality and standards also change with time. Recently, customer-led satisfaction classifications and the use of social media reviews have started changing the way quality and accreditation is perceived.
7. **Country image and marketing strategy.** The global media often portray least developed and post-crisis countries in negative terms. Many countries are simply not known for the attributes that make a suitable travel destination. These situations require appropriate branding and other well-considered marketing strategies. E-tourism — which facilitates dissemination of information on the country of destination, services offered and online booking — is indispensable.

ANALYTICAL FRAMEWORK

Group 2 criteria: Addressing poverty reduction

8. **Human resources development.** LDCs may not have large pools of human resources with the required skill sets for modern and competitive tourism sectors. Training and skill development for tourism workers is crucial for enhancing productivity and services. Human resources development is intrinsically linked with vocational training and informed social dialogue. The involvement of social partners (employers and worker representatives) is essential when dealing with curriculum development and vocational institutions.
9. **Investment climate and small and medium enterprises (SMEs) development.** A favourable business and investment regime is required for a dynamic and competitive tourism sector to attract local and foreign investment and facilitate local and international business linkages. An enabling business environment is further reflected in the extent to which local people manage or are encouraged to establish SMEs, including in the informal sector.
10. **Local employment.** Tourism is a labour-intensive industry that generates skilled and semi-skilled employment opportunities. In addition to the sheer number of jobs, quality of employment issues also require consideration. These may include issues of wage levels, working conditions, implementation of standards and basic rights of labour conventions, gender equality, appropriate provision for young workers, and empowerment.
11. **Business linkages.** Strong business linkages maximize the tourism industry's positive impact on the wider economy and population. Through local procurement, the tourism sector can be linked with local producers, especially farm, horticulture and fishery producers. Local producers need to ensure a predictable supply and meet quality requirements and consumer preferences to be able to compete with imported products. Equally important are forward linkages to global networks and an understanding of market needs.
12. **Social and environmental sustainability.** Tourism should be sustainable in itself and in its social and environmental impact on net welfare gains. It is essential that appropriate policies, including the promotion of environmentally sustainable standards and processes, complement the development of the tourism sector. These standards include the location of facilities and infrastructure, as well as the preservation of species and their habitats. The active participation of local populations is important for the sustainability of tourism development.
13. **Preservation of cultural heritage.** Tourism can have many positive and negative effects on the culture of the destination country. While tourism can help revive traditions which otherwise would be lost and provides the opportunity to enhance mutual understanding between different cultures and nations, national heritage sites and artefacts also risk damage and loss. Preservation of cultural heritage is, along with natural resources, a critical asset for sustainable tourism development.

Data analysis

The **first step** in the DTIS data analysis involved extracting details (in the form of actual narrative) from each DTIS and corresponding action matrix. These details were then filtered through each of the 13 criteria at the three levels of analysis and noted as 'occurrences'. Table 2 provides the example of The Gambia to illustrate the occurrence of DTIS information related to the business linkages criterion at the three levels of analysis. Detailed country matrices will be made available online.⁶

⁶ www.undp.org/poverty

ANALYTICAL FRAMEWORK

Table 2: Occurrences under the business linkages criterion for The Gambia

<p>Policy and regulatory framework</p>	<p>Strengthen linkages between local producers and the tourism industry. Establish a multi-year programme of support for the Gambia is Good and Association of Small Scale Enterprises in Tourism schemes enabling them to expand their operations and increase linkages with tourism.</p> <p>Stronger linkages between hotels/restaurants/local tour operators with Gambian producers and suppliers. Both support to programmes such as Gambia is Good and the Association of Small Scale Enterprises in Tourism programmes and regulation to maintain acceptable standards will be important.</p> <p>Promote increased air service and encourage cooperation between tourism and horticulture enterprises.</p> <p>Encourage import substitution by hotels and restaurants.</p>
<p>Institutional set-up</p>	<p>Linkages between the accommodation sector and agricultural suppliers are being strengthened thanks to the Gambia is Good programme, with one half of all fresh fruits and vegetables supplied locally.</p> <p>The Association of Small Scale Enterprises in Tourism has a programme to encourage handicraft and batik producers to develop new designs and otherwise vary their product offering in order to increase visitor spending on incidental purchases.</p>
<p>Supply side/ enterprise</p>	<p>Tourist expenditures outside the hotels are high by international standards, and generate significant linkages considering the small size of the local economy.</p> <p>Nonetheless, for some farmers groundnuts are a marginal activity and better options exist.</p> <p>Horticulture, sesame and especially cashew nuts represent viable alternatives that should be promoted as quickly as possible. These crops would benefit more people than all those engaged in tourism-related activities – and significantly more of the poor – even if tourism should double in size. Most of the poor are rural, and new opportunities must be found for them.</p>

Table 3: Summary of country matrix: The Gambia

CRITERIA	Policy and regulatory framework	Institutional set-up	Supply side/ enterprise
1. Transport infrastructure			
2. Public utilities			
3. IT and telecom infrastructure			
4. Tourism infrastructure and services			
5. Safety, security and medical services			
6. Hotel accreditation and standards			
7. Country image and marketing strategy			
8. Human resources			
9. Investment climate and SME development			
10. Local employment			
11. Business linkages			
12. Social and environmental sustainability			
13. Preservation of cultural heritage			

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In the **second step**, for each of the 30 countries under review, the occurrences were inserted into a matrix to display the adherence of the DTIS to the criteria at the three distinct levels of analysis. Shaded cells indicate correspondence of DTIS text with a criterion and blank cells indicate absence of DTIS text with respect to the criterion. This provides a visual representation of DTIS concerns, recommendations and other interventions. Again, the summary matrix of The Gambia is presented in Table 3 as an illustration.

In the **third step**, a composite matrix was created summarizing the 30 individual country matrices. The composite matrix allows cross-country analysis and provides a quantitative view of the distribution of references and interventions recommended in the DTIS across all 30 countries. The findings of the composite analysis are reported in Chapter 3.

The **fourth step** was to summarize the country matrices and the comparative matrix in order to present a picture of tourism development in LDCs, develop recommendations at the three levels of intervention, and identify key messages on poverty reduction and inclusiveness.

3. KEY FINDINGS

This Chapter summarizes the main findings of the study, beginning with the results of the intercountry comparisons. This is followed by further consideration of the results in relation to the 13 criteria at the three levels of intervention, and in relation to the six core criteria that are proxies for poverty reduction concerns.

Country comparisons

Table 4 presents a comparative overview of references in the DTIS to the tourism sector, development strategies and pathways. The horizontal axis lists the criteria. The vertical axis lists the countries and three levels of intervention. To allow an overview of the tourism development landscape at a glance, the detailed inputs, references and interventions proposed in each country's DTIS are recorded in their respective cells.

This quantitative, but unweighted, table provides a first impression of the analyses and recommendations made in the DTIS. It does not capture the qualitative variance across countries; it only summarizes the set of 30 matrices. Table 4 compiles the cross-country data in one comprehensive picture to reveal the areas emphasized for tourism development in the DTIS, as well as areas of neglect.

Table 4 shows cells data as available in actual DTIS. Reference to "empty cells" means no data (reference) pertaining to tourism development was found in the DTIS. Access to detailed matrices containing all country occurrences will be made available online.⁷

Gaps in the three levels and 13 criteria

From Table 4, it is possible to infer gaps not only in information but also in the actual situation at the three levels — policy, institutions and supply side — and the 13 criteria. The analysis allows a number of observations.

First, the tourism sectors in different LDCs are at widely varying stages of development. In some LDCs, the tourism sector is in its infancy; in others, it is maturing or passing through an exponential growth phase. The greater the importance of the tourism sector in the economy, the more attention the sector receives in the DTIS. Cape Verde, The Gambia, and Solomon Islands rank first in terms of the issues covered by their respective DTIS. All three countries recorded 35 shaded cells out of 39, indicating a comprehensive chapter dedicated to tourism, covering 90 percent of the criteria. Cambodia, Maldives, and Tanzania, which are well-known tourism destinations, also feature strongly.

⁷ www.undp.org/poverty

KEY FINDINGS

Table 4: Cross-country comparison of DTIS notations by country

COUNTRY	CRITERIA	Level of intervention*	1. Transport infrastructure	2. Public utilities	3. IT and telecom infrastructure	4. Tourism infrastructure and services	5. Safety, security and medical services	6. Hotel accreditation and standard setting	7. Country image and marketing strategy	8. Human resources	9. Investment climate and SME development	10. Local employment	11. Business linkages	12. Social and environmental sustainability	13. Preservation of cultural heritage
Angola	P*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X	X	X	X				X	X	X				
	E*	X	X	X	X		X	X			X				
Benin	P*	X	X	X	X	X			X		X	X	X		X
	I*	X		X	X	X			X		X		X	X	X
	E*	X	X	X	X					X	X		X		
Cambodia	P*	X		X	X	X	X	X	X	X	X	X	X	X	
	I*			X	X		X	X	X	X					X
	E*	X		X	X	X			X	X		X	X	X	X
Cape Verde	P*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X	X	X	X	X			X	X	X	X	X		X
	E*	X	X	X	X	X			X	X	X	X	X		X
Central African Republic	P*	X		X	X	X					X		X	X	
	I*	X			X						X				
	E*	X	X		X						X	X			X
Comoros	P*	X	X	X	X	X			X	X	X	X	X	X	
	I*	X	X	X	X				X	X	X	X	X		
	E*	X	X	X	X	X	X			X	X	X	X	X	X
Djibouti	P*	X	X	X	X				X	X	X	X	X	X	
	I*	X	X	X	X				X	X	X	X	X		
	E*	X	X	X	X						X	X	X	X	
Ethiopia	P*	X	X	X	X		X	X	X	X	X	X	X	X	X
	I*	X		X	X				X	X	X				
	E*	X		X	X		X		X	X	X	X		X	X
Gambia, The	P*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X	X	X	X	X			X	X		X	X	X	X
	E*	X	X	X	X	X	X	X			X		X	X	X
Guinea	P*	X	X		X	X			X	X	X	X	X	X	X
	I*		X		X				X	X	X		X		
	E*	X	X	X	X						X		X		

*Note: P = policy and regulatory framework; I = institutional set-up; E = Supply side/enterprise.

KEY FINDINGS

Table 4: Cross-country comparison of DTIS notations by country

COUNTRY	CRITERIA	Level of intervention*	1. Transport infrastructure	2. Public utilities	3. IT and telecom infrastructure	4. Tourism infrastructure and services	5. Safety, security and medical services	6. Hotel accreditation and standard setting	7. Country image and marketing strategy	8. Human resources	9. Investment climate and SME development	10. Local employment	11. Business linkages	12. Social and environmental sustainability	13. Preservation of cultural heritage
Lao PDR	P*	X				X		X	X	X	X	X	X	X	X
	I*	X				X		X	X	X	X			X	X
	E*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Lesotho	P*	X	X	X	X				X	X	X	X		X	
	I*	X	X	X	X				X	X	X				
	E*	X	X	X					X		X				
Madagascar	P*	X	X	X	X	X	X	X	X	X	X		X	X	X
	I*	X	X	X	X				X		X			X	
	E*	X	X	X	X	X	X				X	X	X	X	
Malawi	P*	X	X	X	X	X				X	X	X	X	X	
	I*	X								X	X				
	E*	X	X		X					X			X	X	X
Maldives	P*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X			X		X	X	X	X	X	X	X		
	E*	X	X	X	X					X	X	X	X	X	
Mali	P*	X	X	X	X		X	X	X	X	X	X	X	X	X
	I*	X	X		X		X	X			X		X	X	
	E*	X	X	X	X		X	X	X	X	X	X	X	X	X
Mauritania	P*	X	X	X	X		X	X	X	X	X	X	X	X	X
	I*	X	X	X	X			X	X	X	X		X	X	X
	E*	X	X	X	X		X	X	X	X	X	X		X	X
Mozambique	P*	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X			X	X	X	X	X	X	X		X	X	
	E*	X	X	X	X		X	X	X	X	X		X	X	X
Nepal	P*	X	X	X	X	X			X	X	X	X	X	X	X
	I*	X			X				X	X	X				X
	E*	X	X	X	X	X			X	X	X		X	X	X
Niger	P*	X	X		X	X	X	X	X	X	X	X	X	X	X
	I*	X	X		X				X	X	X		X	X	X
	E*	X	X	X	X	X	X			X	X	X	X	X	X

*Note: P = policy and regulatory framework; I = institutional set-up; E = Supply side/enterprise.

KEY FINDINGS

Table 4: Cross-country comparison of DTIS notations by country

CRITERIA														
COUNTRY	Level of intervention*	1. Transport infrastructure	2. Public utilities	3. IT and telecom infrastructure	4. Tourism infrastructure and services	5. Safety, security and medical services	6. Hotel accreditation and standard setting	7. Country image and marketing strategy	8. Human resources	9. Investment climate and SME development	10. Local employment	11. Business linkages	12. Social and environmental sustainability	13. Preservation of cultural heritage
	Rwanda	P*	X	X	X	X	X	X	X	X	X		X	
I*		X	X	X	X			X	X	X				
E*		X	X	X	X		X		X	X	X	X	X	X
Sao Tome and Principe	P*	X	X	X	X	X		X	X	X			X	X
	I*	X	X	X	X				X	X				
	E*	X	X	X	X	X			X			X	X	
Senegal	P*	X	X	X	X			X	X	X	X	X	X	X
	I*	X	X		X				X	X		X		
	E*	X	X	X	X			X	X	X	X	X	X	X
Sierra Leone	P*	X	X	X	X		X	X		X		X	X	X
	I*	X	X	X	X			X	X	X		X		
	E*	X	X	X	X					X	X	X	X	
Solomon Islands	P*	X	X	X	X			X	X	X	X	X	X	
	I*	X	X	X	X			X	X	X		X	X	X
	E*	X	X	X	X	X	X	X	X	X	X	X	X	X
Tanzania	P*	X	X	X	X	X	X		X	X		X	X	X
	I*	X		X	X	X		X	X	X		X		
	E*	X	X		X	X	X		X	X	X	X	X	X
Uganda	P*	X	X	X	X	X		X	X	X	X	X	X	X
	I*	X		X	X	X	X	X	X	X			X	
	E*	X	X	X	X	X	X	X	X	X	X	X	X	X
Vanuatu	P*	X	X	X	X	X	X	X	X	X	X	X	X	X
	I*	X	X	X	X			X	X	X		X	X	X
	E*	X	X	X	X	X		X	X	X	X	X	X	X
Yemen	P*	X	X	X	X	X		X	X	X	X			X
	I*	X	X	X	X	X		X		X			X	X
	E*	X	X	X	X					X	X			X
Zambia	P*	X	X	X	X	X	X	X		X			X	
	I*	X	X		X		X	X		X			X	
	E*	X	X	X	X			X		X			X	X

*Note: P = policy and regulatory framework; I = institutional set-up; E = Supply side/enterprise.

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Overall, the DTIS analysis is qualitatively more sophisticated in countries with relatively mature — given the LDC context — tourism sectors status. However, the number of shaded cells in Table 4 alone does not identify the tourism sector’s stage of development. This is because the occurrences could both relate to the identification of growth potential and build upon what has already been achieved.

Second, the 13 criteria are broadly reflected in the DTIS. Tourism infrastructure and services collected the most occurrences (88 occurrences), which is perhaps not surprising given LDCs’ development challenges.

Third, it is rare for a country to not have occurrences in at least one level for each criterion. But there are some exceptions: Sao Tome and Principe and Zambia register no occurrences on local employment. Central African Republic and Zambia have none on human resources. Both of these exceptions involve criteria that are among the poverty reduction proxies.

Fourth, hotel accreditation and standard-setting (38 occurrences); safety, security and medical services (41 occurrences); and local employment (46 occurrences) were the least covered categories. The low occurrence of local employment is particularly surprising in view of the pro-poor concern of the DTIS.

BOX 2: DTIS and poverty reduction orientation

The table below provides a detailed picture of the orientation of the DTIS analysis toward poverty reduction. Half the DTIS surveyed present a pro-poor index^a over 75 percent and can be considered to fully endorse pro-poor concerns.

Solomon Islands, Mauritania, Vanuatu and Lao PDR show the highest consideration of the criteria linked to poverty reduction, with coverage close to 90 percent. Lesotho, Zambia, Central African Republic and Sao Tome and Principe are at the opposite side of the table, with very few references to the core criteria.

COUNTRY	N.	%	Pro-poor proxy
Cape Verde	35	90%	72%
Gambia, The	35	90%	83%
Solomon Islands	35	90%	94%
Uganda	34	87%	83%
Mauritania	33	85%	89%
Mozambique	33	85%	83%
Niger	33	85%	83%
Vanuatu	33	85%	89%
Mali	32	82%	83%
Comoros	31	79%	78%
Lao PDR	31	79%	89%
Tanzania	30	77%	78%
Madagascar	29	74%	61%
Maldives	29	74%	78%
Nepal	29	74%	78%
Cambodia	28	72%	78%

COUNTRY	N.	%	Pro-poor proxy
Rwanda	28	72%	61%
Senegal	28	72%	78%
Angola	27	69%	50%
Djibouti	27	69%	72%
Ethiopia	27	69%	72%
Benin	26	67%	61%
Sierra Leone	26	67%	61%
Yemen	26	67%	56%
Sao Tome & Principe	24	62%	50%
Zambia	24	62%	39%
Guinea	23	59%	61%
Lesotho	21	54%	39%
Malawi	20	51%	61%
Central African Rep.	17	44%	44%

ITEM*	N.	%
Average	28.5	73%
Min	17.0	44%
Max	35.0	90%
Median	28.5	73%
Total	854	

^a The pro-poor proxy is calculated as the percentage of cells covered by occurrences of the six core criteria over the total of cells (234=3x6x13). The six core criteria are human resources, investment climate and SME, local employment, investment climate and SME development, social and environmental issues, and preservation of cultural heritage.

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Fifth, the six core criteria used as proxies for the poverty reduction orientation of the DTIS account for 45 percent of the occurrences. Most of these occurrences can be found under investment climate and SME development (87 occurrences) and human resources (69 occurrences). However, the remaining four core poverty criteria are among those with the fewest occurrences. These include business linkages (8th, with 65 occurrences); social and environmental sustainability (9th, with 64 occurrences); preservation of cultural heritage (10th, with 53 occurrences); and local employment (11th, with only 46 occurrences). See Box 2.

Sixth, references to transport infrastructure and investment climate are found in all DTIS, even if the connection with tourism is not always made explicit. Transport infrastructure, public utilities, telecommunication infrastructure and investment climate are usually described outside the tourism chapter as they are valid for most of the other sectors examined by the DTIS. In a few cases, issues related to air transport are presented in the tourism chapter. The importance of establishing reliable, affordable and frequent air transport connections with tourism source markets ranks high in the concerns elaborated by the DTIS. Lack of basic infrastructure and poor maintenance is an impediment to any pro-poor tourism growth strategy; without a sustainable volume of tourism, the local industry will not be viable.

Overview of intervention levels

Table 5 provides information on references relating to intervention levels across the DTIS. In general, policy references are more common than references to institutional arrangements. Recommendations concerning enterprise issues fall between these two extremes. The DTIS and their accompanying action matrices are more focused on policy-planning than institutional development, although considerable attention is also given to dealing with supply-side/enterprise issues. This finding highlights the risk of emphasizing only supply side and inward looking policies, while failing to prioritize interventions that make tourism products competitive and relevant.

The variance between policy and institutional issues is greatest in the DTIS of **Angola, Guinea, Ethiopia, Madagascar, Maldives, Malawi, Mauritania, Mozambique, Nepal, Niger, Senegal, Solomon Island and Uganda**. In these DTIS, there are five or more criteria in which occurrences at the policy level are not accompanied by references to institutions.

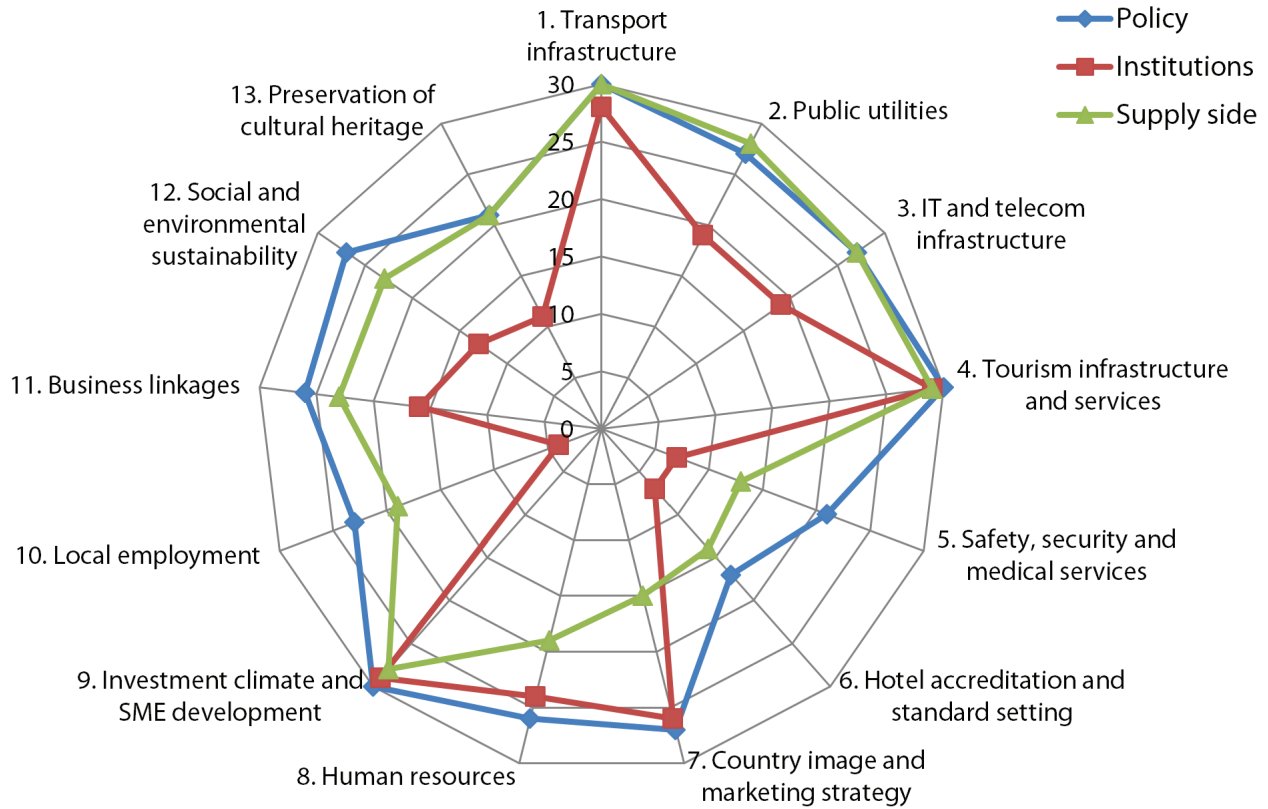
Table 5: Total number of references made per level of intervention

	Policy and regulatory framework	Institutional set-up	Supply side/enterprise
Total number of references in DTIS	331	232	291
Percentage of total shaded cells	39%	27%	34%
Simple average	11	7.7	9.7

At the other end of the spectrum, institutional references are missing only in hotel accreditation and standards, and social and environmental sustainability in **Cape Verde's** DTIS. **The Gambia** lacks institutional references only in human resources and investment climate. **Solomon Islands'** DTIS is missing institutional references in three categories. It is generally acknowledged that these countries prioritize tourism development. The Solomon Islands' DTIS is particularly strong in identifying ways and means — at all three levels of intervention — to ensure strong linkages between the tourism sector and the other sectors of the economy that employ the poor. Solomon Islands scores 94 percent in relation to the six core criteria.

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Figure 2: Radar of occurrences per level of intervention (number of occurrences)



Source: World Economic Forum 2009

These findings are reflected in Figure 2, which depicts the number of occurrences per level of intervention. The diagram portrays the policy bias noted and suggests that some areas related to tourism development lack an integrated formulation of interventions. In these areas, actions focus on one or two of the three levels. This approach arguably weakens the effectiveness of the measures suggested in the DTIS.

Overview of the 13 criteria

Table 6 provides a summary of the total number of occurrences of the 13 criteria in relation to the three levels of intervention.

While many of the criteria are covered by the DTIS, the occurrences of five particular criteria are less than the simple average of 66 occurrences per criteria. These underrepresented criteria are hotel accreditation and standards (38 occurrences); safety, security and medical services (41 occurrences); local employment (46 occurrences); preservation of cultural heritage (53 occurrences); and social and environmental sustainability (64 occurrences). Three out of these five are related to the six core poverty reduction criteria.

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BOX 3: Advice on travel to LDCs in major tourism source markets, February 2011

REGION	COUNTRY	U.S.	U.K.	France	Italy	Canada	Germany
Africa	Angola		Yellow	Red	Yellow	Yellow	Yellow
	Benin						
	Burkina Faso		Yellow	Yellow	Yellow	Yellow	Yellow
	Burundi	Red	Yellow	Red	Red	Red	Yellow
	Cape Verde						
	Central African Rep.	Yellow	Yellow	Yellow	Yellow	Red	Yellow
	Chad	Yellow	Red	Yellow	Red	Red	Red
	Comoros			Red			
	Congo, Dem Rep	Yellow	Red	Red	Red	Red	Red
	Djibouti		Yellow	Yellow	Yellow	Yellow	Yellow
	Equatorial Guinea						
	Eritrea	Red	Yellow			Red	Red
	Ethiopia		Red	Yellow		Red	Yellow
	Gambia						
	Guinea	Red	Red		Yellow	Red	
	Guinea-Bissau			Yellow	Yellow	Yellow	Red
	Lesotho						
	Liberia		Yellow	Red	Yellow	Yellow	
	Madagascar						
	Malawi						
	Mali	Yellow	Yellow	Red	Yellow	Yellow	Yellow
	Mauritania	Yellow	Red	Red	Red	Red	Red
	Mozambique						
	Niger	Red	Red	Red	Red	Red	Red
	Rwanda		Red		Yellow	Yellow	Yellow
	Sao Tome & Principe						
	Senegal		Yellow	Yellow	Yellow		Yellow
	Sierra Leone				Red	Yellow	
	Somalia	Red	Red	Red	Red	Red	Red
	Sudan	Yellow	Red	Red	Yellow	Red	Yellow
	Tanzania			Yellow			
	Togo						
	Uganda		Yellow	Yellow	Yellow	Yellow	Yellow
	Zambia			Yellow		Yellow	Yellow

REGION	COUNTRY	U.S.	U.K.	France	Italy	Canada	Germany
Asia	Afghanistan	Red	Red	Red		Red	Red
	Bangladesh		Yellow	Yellow		Yellow	Yellow
	Bhutan						
	Cambodia		Yellow		Red	Yellow	Yellow
	Lao PDR						
	Maldives						
	Nepal	Red			Yellow		Yellow
	Timor-Leste				Red	Red	
	Yemen	Red	Red	Red	Red	Red	Red
Pacific	Kiribati						
	Samoa						
	Solomon Islands						
	Tuvalu						
	Vanuatu						
Caribbean	Haiti	Red	Red	Red	Red	Red	Red

■ The government advises not to travel to the whole country
■ The government advises not to travel to at least one region of the country

Sources:

Italian Ministry of Foreign Affairs (as of 03/02/2011)
www.viaggiare Sicuri.it

United Kingdom Ministry of Foreign Affairs (as of 03/02/2011)
fco.gov.uk/en/travel-and-living-abroad/travel-advice-by-country/

Canadian Ministry of Foreign Affairs (as of 03/02/2011)
www.voyage.gc.ca/countries_pays/menu-eng.asp

American Ministry of Foreign Affairs (as of 03/02/2011)
travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html

French Ministry of Foreign Affairs (as of 03/02/2011)
diplomatie.gouv.fr/fr/conseils-aux-voyageurs_909/index.html

German Ministry of Foreign Affairs (as of 07/02/2011)
www.auswaertiges-amt.de/DE/Laenderinformationen/SicherheitshinweiseA-Z-Laenderauswahlseite_node.html

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Table 6: Total number of occurrences (shaded cells) across the DTIS
(N = 30 countries x 39 cells = 1,170 cells)

Level of Intervention	1. Transport infrastructure	2. Public utilities	3. IT and telecom infrastructure	4. Tourism infrastructure and services	5. Safety, security and medical services	6. Hotel accreditation and standard setting	7. Country image and marketing strategy	8. Human resources	9. Investment climate and SME development	10. Local employment	11. Business linkages	12. Social and environmental sustainability	13. Preservation of cultural heritage
Policy and regulatory framework	30	27	27	30	21	17	27	26	30	23	26	27	21
Institutional set-up	28	19	19	29	7	7	26	24	29	4	16	13	11
Supply side/enterprise	30	28	27	29	13	14	15	19	28	19	23	23	21
TOTAL	88	74	73	88	41	38	68	69	87	46	65	63	53

Table 6 indicates that attention to security is negligible. This is surprising since the image of many LDCs — an important variable in attracting international tourists — is often negative in source markets. Supply-driven strategies and tourism institutions appear to be at risk of misinterpreting consumers and tourism demand. A quick glance at travel advisory services Web sites in the top 10 tourism-spending nations indicates those countries that tourists are advised to avoid. Box 3 provides information on travel advice in major tourism source market as of February 2011.

Figure 3 summarizes the main findings with regard to the 13 criteria and indicates the criteria where most of the occurrences were recorded. These are posted on the right side of the diagram. Criteria 1, 2, 3, 4, 8 and 9 clearly received more attention than the other criteria. The relative lack of attention to the local employment and safety, security and medical services criteria is of particular concern.

Figure 4 depicts the six core criteria that are used as proxies for poverty reduction. Employment generation in particular receives insufficient attention. As previously noted, policy statements on pro-poor strategy and provision are not supported with institutional and supply side/enterprise measures. The policy bias and limitations of interventions on one level might compromise the sustainability and impact of the actions implemented. For some criteria especially — such as the preservation of cultural heritage and local employment — the lack of institutional references is particularly worrying.

KEY FINDINGS

Figure 3: Radar of occurrences per 13 criteria (number of occurrences)

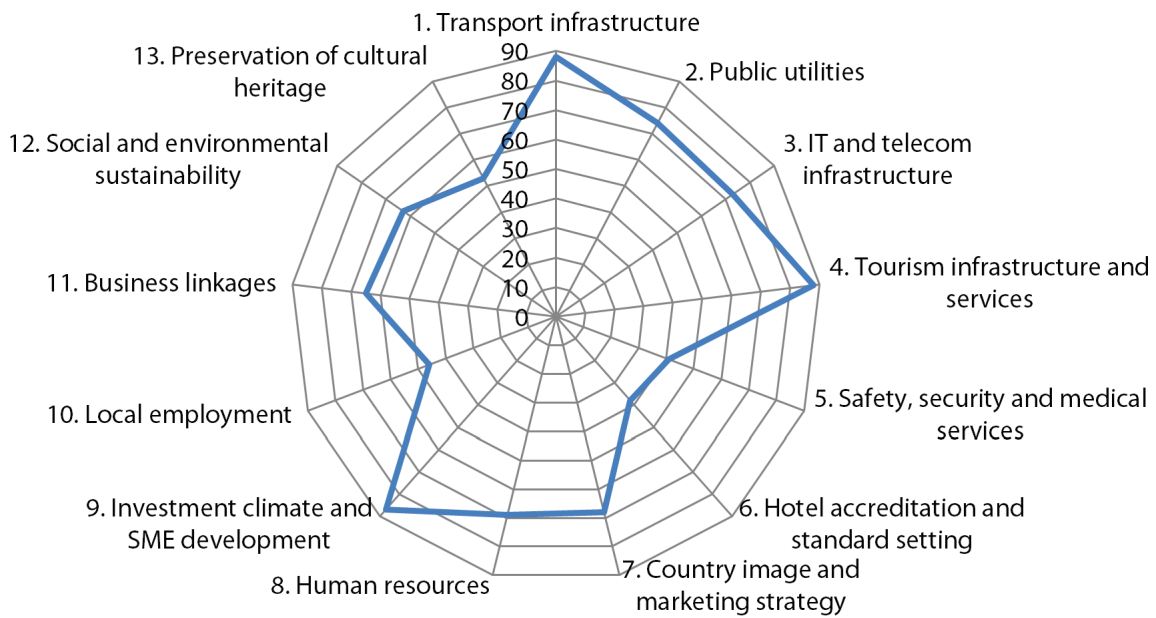
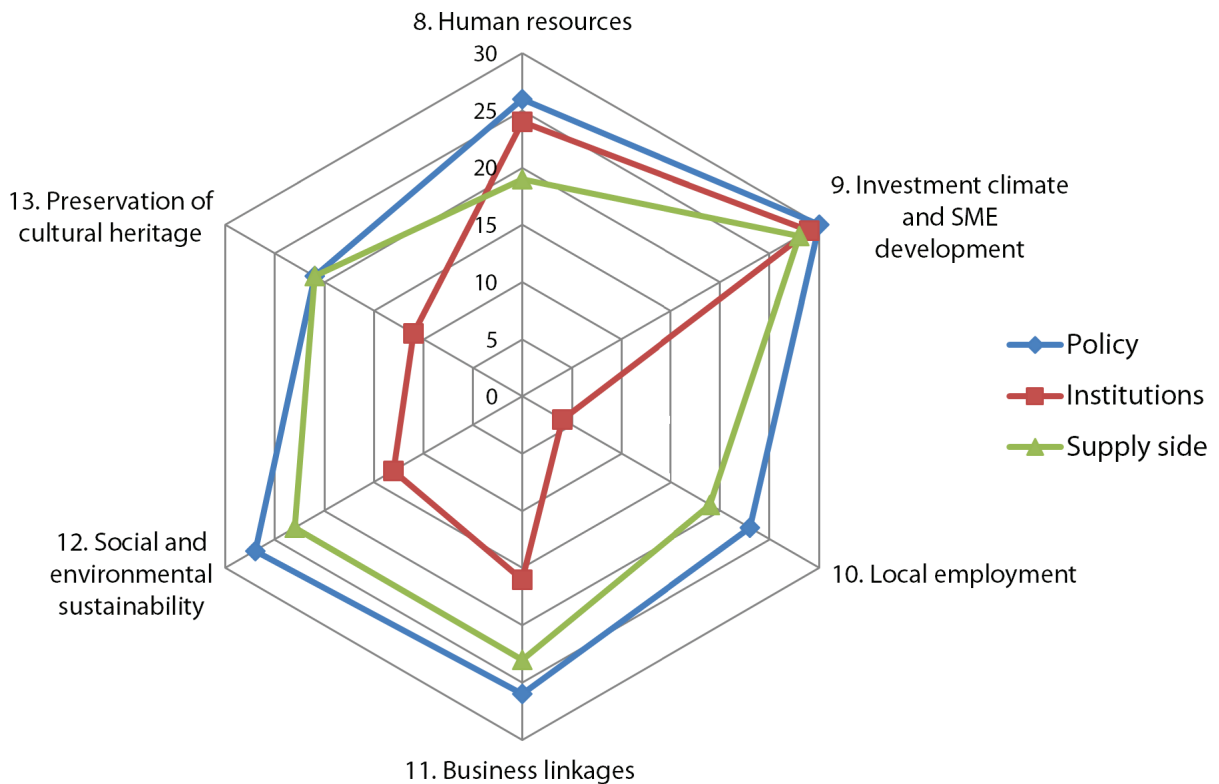


Figure 4: Occurrences of six poverty reduction core criteria (number of occurrences)



4. OBSERVATIONS ON TOURISM DEVELOPMENT AND POVERTY REDUCTION

This Chapter provides further observations on the 13 criteria, based on the analysis of recommended action for tourism development in the DTIS. These observations relate to enhancing inclusion and the direct benefits to the poor. The discussion begins with the general — Group 1 — criteria that address the requirements for building the right enabling environment for tourism development. The discussion then moves to the Group 2 criteria that act as proxies for addressing poverty reduction.

GROUP 1 criteria

Transport Infrastructure

The connection between the development of the tourism sector and the need to modernize a country's transport infrastructure is reflected in the DTIS. Not surprisingly, all DTIS detect a significant weakness in LDCs' transport and logistical systems, such as widespread inefficiencies, severe underinvestment, uncompetitive monopolies and prohibitive costs. While there are important differences in transport infrastructure among the LDCs, they all prioritize investment in transport.

The discussion of transport in the DTIS is often generic or occurs in the broader context of trade facilitation and logistics. However, there are examples where the connection between transport and tourism is explicit. Transport infrastructure is usually reviewed according to the mode of transport — roads, railways, maritime and air. A country's geographic position determines the priority placed on the different modes. Air connections and port infrastructure (servicing cruise lines) feature strongly. The DTIS also value road connections to specific scenic attractions but to a lesser extent in relation to the development of business linkages and local procurement of agricultural goods. This bottleneck has clear implications for pro-poor benefits from value chains and is not adequately addressed. In The Gambia, for example, the production of food for hotels is limited in part by poor infrastructure. Transport systems in and out of the country are often better than those within the country.

The DTIS include the following observations of prevailing transport conditions in some LDCs:

- **Mali.** "Expensive travel to and within the country is a great barrier to promote and increase tourism."
- **Yemen.** "Poor competitive capacity of the national carrier and its antiquated fleet."
- **Mozambique.** "Poor infrastructure, expensive and low capacity transportation; weakness in other service-related infrastructure, including air transport."
- **Rwanda.** "There are only a limited number of destinations and flights available for passengers and freight to/from Kigali International Airport." "The very poor condition of unpaved roads is a major factor raising local transport costs. Poor conditions result from heavy rainfalls during the rainy seasons and lack of maintenance."
- **Tanzania.** "Of the total road network of 85,000 kilometres, only 27 percent are in good and fair condition, while the remaining 73 percent are in poor condition."

In most of the countries, the recommendations suggest opening the transport sector for investment, establishing public-private partnerships (e.g. Ethiopia and Niger) and implementing country transport plans or strategies. Many DTIS call for development partners to support these strategies. Examples of specific recommendations include the following:

OBSERVATIONS ON TOURISM AND POVERTY

- **Uganda.** “Improving the existing ferry service on Lake Victoria between Mwanza in Tanzania and Port Bell in Uganda, to offer more stops at regionally strategic ports where tourists have quicker and easier access to products, for example, Kisumu in Kenya, Musoma, Guta (access to Serengeti National Park).”
- **Cambodia.** “The open skies policy encouraged regional airlines to fly directly to Siem Reap and allowed the magnificent temples of Angkor Wat to become available to a much broader set of tourists.”

The importance of air connections cannot be stressed enough, as they are often the only way for tourists to reach LDCs destinations. The International Air Transport Association⁸ has drawn attention to this by supporting inward investment and business productivity. Bottlenecks are also found in airport infrastructure and inadequate corollary services. In **Sierra Leone** the DTIS reports that the connection between the country’s capital, Freetown, and the international airport is arduous. By road, a detour of about 160 kilometres is necessary, while alternatives are either costly (helicopter), or time consuming (hovercraft or ferry across the river estuary).

Due to limited resources and management capacities, many LDCs’ national transport providers are incapable of channelling sustained tourism flows to their own countries. Consequently contracts are predominately negotiated with Western tour operators (including charter operators). DTIS recommendations on the implementation of open sky regimes and the liberalization of air access (e.g. **Niger**) are common, as is the need of proactive government engagement in negotiating entry into the market for new airlines and charter operators.

In the **Pacific LDCs** and the **Maldives**, the DTIS report that maritime transport is “the aorta of the economy.” This includes inter-island connections within the same country and international cruises. Cape Verde experiences similar challenges, with different levels of tourism sector development among the islands. In these cases, better internal transportation services can drive growth by expanding tourism development throughout the archipelago and increasing the inclusion of communities in the outlying islands.

Transport infrastructure is an important consideration for poverty reduction and inclusion in tourism development. Along with other infrastructure programmes and investments, improved transport helps address the rural infrastructure deficiencies and bottlenecks that hinder local communities from connecting with major national centres.

Public utilities

Reliable and affordable access to energy and water is essential for tourism and other economic sectors. Effective and efficient provision of public goods is a key variable in assuring sustainability and minimizing the negative environmental impacts of tourism operations. Most DTIS provide information on power and water services, addressing efficiency, quality, availability and tariffs. However, only in very few cases are issues such as waste management considered. DTIS notations on public utilities usually include references at the policy and enterprise levels, while occurrences related to institutions are comparatively rare.

In **The Gambia**, “the shortage and high cost of electricity is cited as a major impediment by hotel managers.” The poor state of public utilities and the lack of maintenance undermine the viability of tourism development and reduce the return on investments due to higher costs.

It is essential to guarantee that access to energy and water for tourism purposes does not jeopardise access by local communities, either by restricting the volume of supply (e.g. diverting water from agriculture to hotels) or by increasing prices (hotels and resorts are generally in a better position to pay higher unit prices than local communities). Differential pricing can be applied to favour local communities over tourism establishments. The improved provision of public utilities can have wide pro-poor impacts by enabling local communities to engage in and benefit from the tourism value chain.

⁸ WEF 2009.

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IT and telecommunication infrastructure

Attention to IT and telecom in the DTIS focuses on access and costs considerations. Recommendations are usually generic. Institutional considerations are limited and relate primarily to the establishment of regulatory authorities as part of privatization programmes or private sector expansion. Many DTIS include references to broadband and quality of Internet connections. In **Nepal** weak and expensive high-bandwidth Internet hinders many export sectors, including tourism. In most cases, IT and telecom occurrences in the DTIS highlight the high costs and low quality of telecommunications services, especially outside the capital. In **Sao Tome and Principe**, for example, the DTIS reports that telecommunication coverage is low and largely confined to the capital city and its surroundings. Several DTIS mention the growth of mobile operators, usually in relation to the increasing number of operators and decreasing tariffs.

Improved and affordable IT and telecommunications provision reduce transaction costs and generate efficiencies. Mobile telephony in particular has strong impacts on inclusion. The connection with tourism is direct: products and services associated with the sector is the second highest selling category of items on the Internet. Tourism enterprises will increasingly rely on IT systems to understand market behaviour and commercialize their products.

Tourism infrastructure and services

Most DTIS provide information and recommendations on the tourism infrastructure and services criterion. The DTIS recognize the need to develop and implement national tourism plans and strategies, and to strengthen implementation capacity through institutions and partnerships with the private sector. Almost all DTIS estimate the number of tourist arrivals and source countries and provide basic information on supply-side issues (e.g. numbers of hotel establishments, size, number of beds, type and nature of accommodation services, location, etc). However, the use of these statistics for cross-country analysis is difficult due to comparability issues. The application of mechanisms to collect reliable data (e.g. occupancy rates) is recommended in many of the action matrices. A few DTIS specifically recommend the adoption of a tourism satellite account.

Tourism development plans, other than policy statements, should contain actions to overcome the most prominent barriers. **Solomon Islands'** DTIS describes the typical set of constraints that tourism policies must address:

- Access (e.g. flights)
- Accommodation (e.g. range, quality)
- Amenities (e.g. access to toilets, cleanliness of environment)
- Attractions (e.g. the need to preserve and highlight attractions)
- Activities (e.g. building an array of things for visitors to do)
- Awareness - community and visitor - (e.g. spending opportunities, cultural norms)
- Alliances (e.g. lack of cooperation - both formal and informal - within the industry)

Even when present, tourism strategies are not always mainstreamed in the broader country development agenda and poverty reduction strategy. In **Rwanda**, for example, the DTIS reports that the government did not consider tourism as a strategic sector in its Vision 2020. This is reflected in limited coverage in the country's Poverty Reduction Strategy Paper.

In **Maldives**, the Tourism Act covers all aspects of tourism investment—from land allocation and leases to the operation of guesthouses, hotels and resorts. A tourism master plan covers other policy issues. From an early stage, the Maldives government provided policy guidance and institutional support to the sector. The recommendations contained in the DTIS address the implementation of the third tourism sector master plan by focusing on how to distribute the economic gains, including employment.

OBSERVATIONS ON TOURISM AND POVERTY

Regional and provincial levels of governance may play different roles in the development of tourism. In **Vanuatu** the DTIS notes that provincial and even local tourism strategies and plans are in place. With donors or NGO support, the outlying islands are also involved in strategy development.

LDCs differ in terms of institutions supporting the tourism sector. Some countries maintain independent tourism ministries. Some have established implementation agencies such as associations and boards. It is not possible or useful to assess these differences because the context varies. However, some relevant findings are reported below:

- Capacity development issues are a matter of concern in most DTIS. Tourism support institutions are often understaffed and marginalized in national budget allocations. For example, the Office of Tourism in **Mali** reportedly has only few professionals. The DTIS suggests a review of the personnel training scheme and organizational structure.
- The mismatch between countries' vision and strategies and effective implementation arrangements is often a major challenge. In **Mozambique** the DTIS proposes to strengthen the government's capacity to deliver on tourism development plans.
- **Maldives** seems to be one of the most well-endowed countries in terms of tourism institutional support infrastructures, which include an independent ministry, a promotion board, and an association of enterprises. Responsibility for civil aviation was added to the tourism ministry's portfolio, now the Ministry of Tourism and Civil Aviation.
- The DTIS frequently mention strengthening public-private partnerships as key to improving tourism promotion and overcoming obstacles to the development of the sector.
- The need to enhance the coordination of institutional actors, both private and public, is another common recommendation. The roles of investment promotion agencies and export promotion bodies in tourism often require better coordination. In **Rwanda** the successful implementation of the tourism strategy is specifically connected with more effective inter-ministry cooperation mechanisms.

Product diversification and the provision of services other than accommodation is a major challenge for tourism services. However, in several LDCs it is possible to find niche operators. In **Djibouti**, while overall tourism arrivals are relatively low, there are specialized operators offering services such as diving and fishing, and products focused on nature and environmental treasures.

The concentration of tourism services in the capital or in a limited number of tourism hot spots is also common in many LDCs. Geographic concentrations increase the risk of developing the sector through tourism enclaves with limited linkages to nearby communities.

Most DTIS do not sufficiently consider the question of value for money or competitiveness. This oversight is due to the fact that DTIS recommendations are directed at policy makers not market operators and tourism enterprises. In only a few DTIS are recommendations formulated on the basis of a deeper market research effort or demand assessments.

A few DTIS reference comparator countries (e.g. Vanuatu and Tanzania) and benchmarks.

It is important to note that many LDCs had modest tourism sectors in the 1960s and 1970s. Political instability and internal conflicts hampered growth. In some cases, such as **Rwanda**, **Sierra Leone**, **Uganda**, tourism infrastructure was destroyed. The DTIS for these countries acknowledge the reconstruction challenge. The Diaspora is an important initial target for post-conflict countries and development strategies, as is the re-establishment of cultural ties with former colonial powers.

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To a large extent, the information on tourism infrastructure and services in LDCs does not analyse income generating and employment opportunities for the poor. Uganda's is the only DTIS to provide estimations of the poverty reduction impact of tourism sectoral GDP growth.

Safety, security and medical services

Safety, security and medical services is the least covered criteria despite its critical importance to the tourism market. Given the post-conflict environment in many LDCs, this lack of attention is surprising. Where safety and security is mentioned, recommendations focus on rebuilding a positive image of the country. In **Rwanda's** DTIS, security factors are considered a risk to be taken into account. In **Tanzania's** DTIS, safety and security relates to food quality and safety and adequate sanitation, with concrete recommendations at all three level of analysis and a special focus on SMEs. **Uganda's** DTIS is one of the few to include specific references to the consequences for the private sector of insecurity. Another set of recommendations includes transportation — mainly air — safety and access to hospital and health facilities for tourists. Public health concerns such as HIV and AIDS are also covered. However, in general, the DTIS fail to acknowledge the risks and social impact of sexual tourism.

Hotel accreditation and standard setting

The appeal of tourism destinations is increasingly driven by consumer requirements. With the emergence of new destinations, the availability of quality services is critical. Specifications about quality and certification are also important in global networks. Standards and quality control issues are essential not only in the provision of tourism services but also for local procurement. To ensure standards — domestic or international — are met, awareness-raising activities and targeted support by intermediary organizations and sector associations are required. Few DTIS mention quality considerations and accreditation frameworks for hotels and restaurants. Hotel accreditation and standard setting is the least covered criterion.

In **Lao PDR** the DTIS underlines the importance of engaging private sectors associations, noting, "The Association of Travel Agents, the Hotel, and Restaurant Association and a potential tour guide association are critical players in coordinating the cluster and implementing joint initiatives such as establishing certification committees for hotels, restaurants, and guest houses aligned with ASEAN [Association of Southeast Asian Nations] standards." **Tanzania** has a hotel classification scheme. DTIS recommendations touch on concerns over food safety in small- and medium-size hotels where appropriate facilities (e.g. cold stores, preparation tables, water treatment systems, proper kitchens) and properly trained staff or management systems to control food safety risks may be absent. **Mali's** DTIS calls for technical support for local institutions in applying ratings to tourism services. **Mozambique's** DTIS contains specific recommendations to improve the inspection mechanism and provide transparent information to consumers.

In most LDCs, issues pertaining to quality and accreditation are a serious constraint on the development of the tourism sector. Poor quality does not translate into premium prices and income. Without investment in this domain, including in human capital, LDCs would fail to achieve compliance with the existing array of international standards. Of course, the promotion of hotel accreditation and standard setting does not in itself increase the quality of the tourism services provided. Other criteria, such as the investment climate and SME development, are also important for improving quality standards in the tourism sector.

Quality has different meanings in different markets and quality assurance systems are changing as consumers increasingly trust social media over government hotel ratings. LDCs must adjust to the inevitable decline in relevance that official standards will hold for consumers.

Country image and marketing strategy

Most of the attractions in LDCs — excluding world heritage sites such Angkor Wat in Cambodia and natural parks in Africa — are not sufficiently known. Even when LDC destinations are well known, most LDCs struggle with a negative image. Political instability and conflict seriously hinder tourism potential, and image reversal initiatives can be costly.

OBSERVATIONS ON TOURISM AND POVERTY

The limited resources available for marketing strategies and promotion activities call for well-designed marketing interventions. The initial growth in tourism experienced by Lao PDR and Cambodia was linked to extensions of Thailand's tourism packages. Accordingly, some DTIS advocate a regional approach that connects with better known brands. Mozambique's DTIS illustrates this approach by connecting with South Africa's more high profile tourism industry. This is a viable option for LDCs in Southern and Eastern Africa, which could benefit from joint initiatives with South Africa or Kenya. The Regional Tourism Organization for Southern Africa was established in 1996 and provides an institutional framework for regional cooperation among SADC members. Most DTIS, however, do not provide sufficient information on the effectiveness of regional cooperation mechanisms.

Angola's DTIS makes specific suggestions to improve the country's image. These include establishing information and marketing procedures to advertise Angola and build a positive image; raising the visibility and improving the perception of Angola as a tourist destination; and increasing tourism marketing, starting with business travellers already travelling to Angola.

Lao PDR's DTIS makes evident the technological gaps in the marketing of tour operators. Of the 60 tour operators in Lao PDR, only 10 have operating Web sites.

Maldives is clearly the most advanced LDC in marketing. The Maldives Tourism Promotion Board operates overseas offices in Germany and the United Kingdom.

Limited information on country supply capacity and trends in world demand make it difficult to design marketing strategies, as many DTIS illustrate. To be effective, promotion strategies must be based on solid data and market intelligence. DTIS must also be innovative in showing how marketing can be linked to campaigns to eradicate poverty and draw tourists' attention to the role the industry can play in poverty reduction.

GROUP 2 criteria

Human resources

The **human resources** criterion is important for human development and poverty reduction since it relates to the quality of jobs, skills and empowerment. Most DTIS include a section on human resources, referencing policy initiatives and the establishment of institutions that provide training beyond what is offered by hotels and resorts. The common challenge for LDCs is to upgrade skills to provide sophisticated and high value-added tourism services. The involvement of partners — employers and worker representatives — is essential when developing curricula and vocational institutions.

Even in LDCs where the tourism sector has grown significantly, the DTIS note the need to improve education and skills of workers. These concerns are reflected in the DTIS of **Cape Verde**, which cites vocational training improvement as a priority action. DTIS recommendations include pilot programmes to establish or upgrade hotel schools with greater private sector participation. Private sector involvement is essential for relevance and quality of training.

In **Maldives** the Maldives College of Higher Education's Faculty of Hospitality and Tourism Studies provides tourism training. The curriculum covers bartending, catering and food services, and cleaning and housekeeping. The programme has not been able to keep pace with industry demand. The DTIS recommends the decentralization of existing training facilities to allow more activities at atoll level and to benefit women. In the Pacific there is scope for collaboration in promoting a regional tourism training centre, as mentioned in **Vanuatu's** DTIS.

Skill development facilitates employment opportunities. Learning opportunities must be open to the poor and groups such as women and ethnic minorities who often face discrimination. Additionally, skill development interventions do not need to focus only on direct employment in the hospitality industry. One of the most promising areas for poverty reduction is through the strengthening of the supply chain that serves the tourism sector. The production of quality food, for example, coupled with on-time

OBSERVATIONS ON TOURISM AND POVERTY

delivery can multiply the economic benefit of tourism without relying on increased tourist arrivals. Developing and upgrading the skills in the supply chain require coordination between different vocational training institutions and supporting programmes.

Investment climate and SME development

Most DTIS dedicate a chapter to the investment and business climate. The picture that emerges with respect to the investment climate for tourism indicates common challenges in attracting long-term investments outside the primary sector. Land ownership issues and the role of land as investment collateral is often referenced as a legal obstacle. This is especially a concern where tourism is the leading sector, such as in **Cape Verde, Maldives** and **Vanuatu**. It is important to provide incentives for business models where profits derive from tourism facilities, rather than models where profits are mainly generated from land sales or construction.

While the DTIS do not provide consistent data on the share of investment in tourism, the sector often attracts a substantial share of FDI. In tourism-dependent countries such as **Maldives**, up to 80 percent of FDI was reportedly directed to the tourism sector. Enclave resorts are not the only development option for LDCs; the demand for tourism products is now more diversified. **Comoros's** DTIS reports initiatives related to the refurbishment of state-owned hotels through partnerships with foreign investors from the Gulf. Few LDCs, such as **Vanuatu**, maintain economic activities reserved exclusively for nationals.

In terms of institutional setting, many LDCs have investment promotion agencies. However, limited human and financial resources often challenge the work of these fledgling institutions. Several LDC governments engage in some degree of SME assistance, including microfinance provision, usually with the support of development partners. However, the linkages between SMEs and FDI and other large-scale investment, and opportunities for the poor, are often not made.

Local employment

The DTIS rarely refer to local employment and almost no occurrences are found at the institution level. The DTIS also pay limited attention to gender participation in the tourism sector and quality of jobs and enforcement of labour conventions. All of these issues are fundamental to pro-poor tourism.

Only a few DTIS make references to gender participation. In **Maldives** a gender bias in tourism employment patterns is mentioned in relation to enrolment of women for training in hospitality and tourism. **Vanuatu's** DTIS calls for increasing female participation in the tourism sector.

Some DTIS mention employment in relation to backward linkages (e.g. transport and agriculture). The share of indirect employment generated by tourism can be high, as in the case of **Djibouti**, where it reaches 50 percent. Description of the labour force is often connected to the lack of skilled human resources. The issue of expatriate workers features in the Pacific LDCs and other small islands where competition for jobs is strong. The **Maldives's** DTIS notes that "with foreign workers accounting for over half the total number of jobs in the tourism sector, the recommendations deal with labor market issues, education and training." These two countries enacted legal provisions to limit the employment of foreign workers.

There is a clear mismatch between policy provisions and institutional arrangement in support of local employment. **Cape Verde**, where the DTIS recommends the establishment of a recruitment centre, is an exception. Cape Verde's DTIS also recommends the provision of information about tourism job opportunities at secondary school level.

Overall, DTIS coverage of the employment contribution of the tourism sector is inadequate. Most policy recommendations envisage the potential that tourism development holds for job creation. For example **Mauritania's** DTIS proposes a review of licenses and taxes to promote employment in the tourism sector. The prominence of the informal economy, which characterizes many LDCs, is only marginally addressed in relation to tourism.

OBSERVATIONS ON TOURISM AND POVERTY

Business linkages

The supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor is one of the channels through which tourism contributes to poverty reduction efforts. Linkages between sectors are necessary to promote growth and broad-based development in LDCs, where internal markets are often small and industry clusters are not competitive in world markets. The tourism sector can have strong linkages with the agriculture, fishery, construction and manufacturing sectors, among others. Modern resorts require high-quality products. While in the past there was overreliance on imports, recent developments in corporate social responsibility have persuaded hotel chains to invest in local sourcing. Other linkages occur in the creative industry, including cultural products and artisanal activities. Encouraging poverty alleviation through sustainable supply chain management is arguably one of the greatest areas of potential for achieving poverty reduction. Leakage of benefits should be guarded against. In **Cambodia** leakage is reportedly high due to lack of adequate linkages to agri-food sector.

Several DTIS value the importance of establishing business linkages between tourism and other sectors of the economy. **Vanuatu**, for example, is considering establishing intermediary organizations to on-sell products to the tourism sector. **Maldives'** DTIS closely examines how to link the fisheries sector with the tourism sector to support employment and income generation.

The "**Gambia is Good**" programme is an example of linkages between tourism enterprises and agricultural suppliers. Under this programme, which is cited by other countries' DTIS as a positive example, local farmers supply half of all fresh fruits and vegetables required by the country's tourism sector. The Association of Small Scale Enterprises in Tourism in The Gambia sponsors a programme that encourages handicraft and batik producers to develop new designs and otherwise vary their product offering to increase visitor spending. **Guinea's** DTIS also underscores the potential in connecting tourism activities with handicrafts production.

A number of DTIS, such as those of **Lesotho, Yemen, and Zambia**, are silent on business linkages.

Lack of finance and poor entrepreneurial skills limit some agricultural producers' abilities to move up the value chain and establish linkages with the tourism sector. The DTIS of **Comoros** suggests the establishment of a public partnership to sustain small-scale poverty reduction projects financed by the biggest tourism resorts. The projects would target sectors along the tourism value chain, including agriculture production and souvenirs and artifacts. The objective is to provide training for future entrepreneurs accompanied by microcredit lines.

The **Cape Verde** DTIS clarifies another important linkage. Tourism development has fueled a local construction boom. While a tourism-related construction boom may spur short-term employment creation, it can foster a growth pattern that is unsustainable in the long term.

Mali's DTIS underscores the importance of the linkage with the cultural industry by referring to the music industry's positive impact on Mali's image as a tourism destination. This link does not appear in **Senegal's** DTIS, although Senegal is also well known for its cultural industries.

Lack of coordination between institutions is an obstacle to enhancing intra-sectoral linkages. Specific recommendations to strengthen institutional support for reinforcing business linkages are made in **Mauritania's** DTIS. Institutional weakness in supporting economic diversification is noted in **Benin**.

The participation of local communities and local entrepreneurs in tourism development is an important driver for promoting linkages with the local economy, as widely recognized in some of the DTIS.

Social and environmental sustainability

The social and environmental sustainability criterion is particularly relevant to human development and draws attention to the degree to which sustainability considerations influence tourism discussions. Sustainability considerations cover the tourism development product cycle, from the physical development of tourism-related structures through appropriate location and design.

OBSERVATIONS ON TOURISM AND POVERTY

There are several dimensions to social and environmental sustainability. First, tourism has undeniable social and environmental impacts. Hotels consume large amounts of water and energy and produce large amounts of waste. They affect local societies by consuming already scarce resources. Second, tourism can help preserve the natural and societal assets that it relies on, such as biodiversity and flagship species and their natural habitats, as well as local people. Third, tourism contributes directly to climate change and carbon emission, mainly through travel. Most DTIS focus on the second dimension and overlook the others. The lack of reference to climate change, despite its well-known threat to islands and other vulnerable LDCs, is surprising.

Many DTIS recognize that tourism has positive and negative impacts on social and environmental considerations and acknowledge that win-win solutions must be identified. Information, analysis and recommendations on environmental considerations are not lacking. Information is provided on preservation initiatives for the management and protection of parks as well as potential areas of conflict.

Some DTIS highlight risks related to specific tourism niches such as hunting. **Niger** has developed an unusual tourism product: hunting. Hunting operations in Niger involve large tracts of land leased to foreign nationals. In the Agadez region alone, four concessions have been allotted on an experimental basis and seven more are under consideration. The DTIS recalls that the implications of hunting concessions on nomadic pastoralism were not carefully reviewed, and recommends a thorough cost-benefit analysis before more concessions are granted. The DTIS also offers an interesting example of cooperation. The plateau of Kouré is the habitat for the last surviving giraffes in West Africa. Nigerian, Dutch, and European Union cooperation has helped revive the populations from a low of 50 animals to about 140. Communities in the region were trained to live with and protect the animals. Kouré is a tourist attraction in itself and an example of community participation to protect a threatened species.

Given the natural endowments of many LDCs, the development of ecotourism is often flagged in DTIS sections dedicated to tourism. Some of these environmental resources are shared between different countries: 'Parc du W 93' is a trans-frontier wildlife sanctuary shared by **Benin, Burkina Faso** and **Niger**. **Zambia** has developed an inventory of potential tourism development sites, with its 19 national parks and 34 game areas covering 33 percent of the country. However, while the DTIS addresses the use of environment assets for tourism development, the discussion of the sustainability and suitability of opening national havens to tourism development is marginal.

The DTIS also review the institutional aspects of sustainability. There appears to be limited communication between the organizations responsible for environmental preservation and those responsible for tourism development. **Uganda's** DTIS reports the establishment of a wildlife authority that is responsible for managing Uganda's 10 national parks and 14 wildlife reserves. However, the authority has not built strong ties to the private sector and has been reluctant to introduce innovation in park and reserve management.

Some DTIS reveal interesting findings on how the social and environmental dimensions of tourism development can lead to poverty reduction outcomes. The Ugandan DTIS cites the Kakum Canopy Walkway in Ghana as an example of how to sustainably exploit the richness of a protected area by providing additional income to the local population. By charging admission fees, local people developed an alternative source of income to replace environment-damaging income generating activities. In addition, tourism generated by the walkway brought new jobs and revenues that could be used to preserve the endangered rainforest ecosystem. Uganda's DTIS suggests a similar pathway may be available given Uganda's diversity of primary forests.

The DTIS in **Mozambique** recommends that tourism development planners work with local entrepreneurs and communities in specific areas, such as ecotourism and eco-lodge development and management, wildlife interpretation, community-managed conservation areas, and marine life conservation. However, few details are provided on how to implement such initiatives.

CONCLUSIONS AND RECOMMENDATIONS

Preservation of cultural heritage⁹

The conservation of cultural heritage sites and the preservation of local cultures and lifestyles are important dimensions of human development. Cultural tourism is both a niche market and a central feature of most travel to LDCs. Tourism can have positive as well as negative impacts on the culture of the destination country. These impacts are difficult to assess and value and the DTIS tend to overlook this aspect of tourism. Preservation of cultural heritage is one of the criteria with relatively few occurrences in the country matrices. Even when references are found, they are generic or superficial. Worryingly, most mentions of cultural heritage describe the exploitation of cultural resources for tourism purposes, with limited reference to promoting responsible forms of tourism that will preserve cultural heritage. While only a few LDCs—such as Cambodia—have assets such as renowned historical sites, the cultural dimension of the travel and the business linkage between the cultural industry and tourism should be better addressed in the DTIS.

Yemen's DTIS reports an “abundance of unique scenic and historical attractions which make tourism a sector with considerable unrealized potential.” However, it also refers to the challenge of assigning funds to historical preservation and the need to involve development partners to preserve cultural heritage. The General Organization for the Protection of Cultural Heritage in Yemen and the General Organization for Antiquities are insufficiently supported by the national budget. **Vanuatu's** DTIS notes a “growing desire on the part of visitors to experience something unique and different—both mass tourists and niche groups.” The corresponding recommendation is limited to a proposal for a more active engagement of institutions in promoting cultural experiences. **Nepal's** DTIS makes the innovative proposal to develop health tourism by attracting patients to Ayurvedic medicines and related culture.

In **Mauritania** preservation of cultural heritage and traditions has not taken root, despite the government's commitment and the support of donor partners. There are important synergies arising from promoting both tourism and cultural industries as referenced in the case of **Mali**, where the link is considered significant. In **Senegal**, the tourism sector is reported to have failed to take advantage of the rich cultural offerings (e.g. Jazz festival in St. Louis). Cultural tourism is also emphasized in the DTIS for Asian LDCs such as Cambodia and **Lao PDR**.

The DTIS' focus on natural resources is understandable given the strong assets at the disposal of LDCs. However, a more balanced and inclusive approach toward the development of cultural attractions should be considered in several countries.

5. CONCLUSIONS AND RECOMMENDATIONS

The road to a vibrant tourism sector is not without challenges. Converting comparative advantage into competitiveness requires a coherent policy framework, effective and efficient institutions and a proactive private sector. In addition, a national tourism development strategy must inevitably address issues that extend beyond the sector and establish cross-sectoral linkages. This wider perspective is required if tourism development is to positively affect inclusion and poverty reduction.

Thirty of the 35 DTIS reviewed prioritize the tourism sector. This is an important message for the development community, especially in view of the low priority traditionally assigned to the tourism sector in development cooperation.

⁹ UNESCO international agreements—the Convention Concerning the Protection of the World Cultural and Natural Heritage (1972) and the Convention for the Safeguarding of Intangible Cultural Heritage (2003)—provide a legal framework for the preservation of heritage assets for cultural and eco-tourism development.

CONCLUSIONS AND RECOMMENDATIONS

DTIS should fully incorporate sustainable and inclusive tourism¹⁰ considerations in the sector analyses

The main message to emerge from the DTIS review is that much more must be done to incorporate pro-poor concerns, gender issues and sustainability considerations. Occurrences of the six criteria that were used as proxies for poverty reduction and inclusion reveal serious gaps in about half the DTIS examined. To overcome these shortcomings, the following observations and recommendations should be considered:

- The DTIS should provide detailed analysis of the impact of tourism development on poverty reduction and the opportunities for inclusion, particularly for communities located close to tourism establishments.
- The absence of institutional backstopping in relation to the six core criteria or proxies indicates that a major effort is required to incorporate and internalize pro-poor objectives within public agencies and programmes.
- The DTIS analysis tends to focus on the supply side and on the resources required to strengthen a country's offer, rather than on demand side and market considerations. There is limited acknowledgement of the need to develop market-relevant tourism products. This could lead to the formulation of unsustainable policies and low or negative returns on public expenditures devoted to tourism development.
- More information on gender participation in the tourism sector is needed to identify concrete actions to reduce participation gaps. The DTIS that were examined were particularly disappointing on this issue.
- The DTIS have not adequately shown how to better connect vocational training and skill upgrading efforts with local employment opportunities.
- While the DTIS underscore the importance of social and environmental sustainability, they do not provide adequate perspectives on how to ensure the participation of communities in the development and management of tourism development interventions.
- The DTIS make limited reference to segmenting and targeting markets in relation to responsible use of economic, social and environmental assets and limitations. The result is that all forms of tourism are encouraged in the apparent belief that they will implicitly contribute to poverty reduction. This leaves limited space for tourism strategies that are specifically designed to disproportionately benefit the poor.
- Appropriate forms of tourism development and preservation of environmental and cultural assets should proceed hand-in-hand. LDCs' most valuable assets are their immense natural resources. The DTIS have not shown how these assets should be preserved for future generations. There are only a few references to efforts aimed at limiting the consumption of natural resources by tourism facilities, and limited mentions of preserving wildlife and habitats. More importantly, climate change issues and innovations in green technologies and architecture do not feature in DTIS discussions.

The stated goal of the DTIS is to ascertain the main constraints and obstacles that impede LDCs' integration into the world economy so that they may benefit from trade and globalization. To this extent, the intention of the DTIS is not to produce a national tourism strategy, a capacity assessment of tourism institutions, or a comprehensive sectoral analysis. The aim rather is to identify priority actions for governments, stakeholders and partners to undertake in scaling up the supply response.

¹⁰ ITC defines inclusive tourism as "A means of tourism development that fosters links and interaction between the different actors in the tourism industry, forms partnerships with private actors, stimulates the local economy and promotes the integration of poor men and women and active involvement of local communities. It emphasizes sustainability, taking environmental, social and economic factors into account."

CONCLUSIONS AND RECOMMENDATIONS

It should also be acknowledged that the DTIS differ on the length and depth of their tourism sectoral analysis. The DTIS of Maldives and Cape Verde, for example, strategically place tourism in each section of the diagnostic and do not relegate it to the sectoral chapter.

The DTIS represent a significant and unique source of information on LDCs because they merge strong macroeconomic and sectoral analysis with stakeholder consultations and participatory validation processes. Despite these strong advantages, most of the DTIS surveyed are not entirely successful in outlining strongly inclusive scaled-up tourism supply responses.

Most DTIS make only generalized observations about large-scale reforms. In addition, the analyses are not systematically disaggregated. No DTIS employs an analytical framework that is similar to the one adopted in this study—the three levels of intervention, 13 criteria and pro-poor proxies.

Specific issues to be addressed in future DTIS

A number of specific shortcomings should be addressed in future DTIS and DTIS updates:

- Overall, the DTIS give insufficient attention to the nexus between infrastructure, tourism development and poverty reduction. Some DTIS (e.g. Maldives) do make this connection and they can guide future DTIS work. Two of the greatest challenges for LDCs are lack of adequate infrastructure and weak institutions.
- Security and political stability are key factors in building a positive country image and attracting foreign and domestic investment for tourism development. In post-conflict countries the perception of risk may be disproportionate to actual conditions. These issues must be sufficiently addressed. Security is a prerequisite for tourism.
- The DTIS do not adequately consider quality and (national or international) standards. A systematic approach toward building a client-oriented culture, which is supported by industry and labour standards and monitoring and compliance systems, is lacking.
- The tourism sector requires a wide spectrum of skills and also provides opportunities for the unskilled. The need for training and skill development through domestic providers and in partnership with global chains or regional vocational centres is critical and requires more emphasis.
- The tourism sector is sensitive to various external shocks, as illustrated by its response to the 2007–2008 global recession. Contingency considerations for dealing with shocks do not feature strongly in the DTIS. Different tourism products and source markets might mean different levels of resilience to external shocks. Future DTIS should reflect this reality.
- While many LDCs are competitors in the tourism market, cooperation is also possible. The regional facet of tourism is clear in Mozambique's DTIS and others in Southern Africa, where SADC countries established a regional organization to promote tourism. Regional cooperation would benefit from further attention in future DTIS.

Conclusion

Governments should be aware of the impacts of different forms of tourism development and promote growth models with assumptions and implications that are fully understood. A pro-poor tourism approach will seek forms of development that disproportionately benefit the poor. Inclusive tourism development entails targeted support programmes, investment in infrastructure and increased community participation. The functioning of domestic markets should be improved to reduce leakage

CONCLUSIONS AND RECOMMENDATIONS

and capture benefits for the national economy. Integration within global tourism networks and practical action to establish linkages with other sectors of the economy and along tourism value chains are also key elements of pro-poor tourism development.

Tourism sections in the next generation of DTIS

Under the EIF, a number of countries will prepare DTIS updates and new entrants will undergo diagnostic exercises. It is hoped that the insights from this study will provide some indications of how tourism sectoral assessments and recommendations can be improved.

A sustainable tourism development strategy or sectoral policy should consider the cross-sectoral dimension of tourism and the need to integrate tourism development in the broader development agenda while building the country's competitive advantage. Differentiated approaches and contextualized solutions are needed. Any strategy for tourism development should be dynamic enough to adapt to changing circumstances and priorities in order to maximize poverty reduction impacts.

In preparing the next round of DTIS, it will be important to highlight pro-poor measures that have a positive impact on human development. Analysis and recommendations should not only focus on increasing overall competitiveness and productivity but also on promoting sustainability and inclusion. Intuitively, tourism development is expected to fight poverty, but the link is neither automatic nor straightforward. Gender, income generation, employment, and opportunities aimed at youth should be taken fully into account. To quote the outcome document of the LDC IV pre-conference event in Caen, "Analysing the different drivers of tourism development and studying the performance of actors at each stage is helpful for policy makers, institutions and entrepreneurs to pinpoint the competitive disadvantages and identify points for further action to achieve pro-poor growth."¹¹ Clearly, there is much room for improvement in future DTIS.

¹¹ Meeting report, International High-level Meeting of Experts on Sustainable Tourism for Development in the Least Developed Countries, Caen, France, 12-14 October 2010.

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Annex I: Latest Tourism Data on LDCs (Provided by UNWTO)

1. Inbound tourism: Arrivals 2009

Least Developed Countries (LDCs)	Arrivals of non-resident overnight visitors (tourists) at national borders (Thousands)	Carrying capacity (arrivals/population) (Units)
TOTAL LDCs	15,284	0.02
AFRICA LDCs	9,966	0.02
Angola	366	0.02
Benin	190	0.02
Burkina Faso	269	0.02
Burundi (2006)	201	0.03
Central African Republic	52	0.01
Comoros (2007)	15	0.001
Chad (2007)	25	0.04
Democratic Republic of the Congo	53	-
Djibouti (2008)	53	0.06
Equatorial Guinea	-	-
Eritrea (v)	79	0.02
Ethiopia (2008)	330	0.004
Gambia	142	0.08
Guinea (2007)	30	0.003
Guinea-Bissau (2007)	30	0.02
Lesotho	320	0.15
Liberia	-	-
Madagascar	163	0.008
Malawi	755	0.05
Mali	160	0.01
Mauritania	-	-
Mozambique	2,224	0.10
Niger (2008)	73	0.005
Rwanda (v)	699	0.07
Sao Tome and Principe	15	0.09
Senegal (2007)	875	0.07
Sierra Leone (2008)	36	0.006
Somalia	-	-
Sudan	420	0.010
Togo	150	0.02
Uganda	817	0.02
United Republic of Tanzania	714	0.02
Zambia	710	0.05
AMERICAS LDCs	304	0.03
Haiti (2008)	304	0.03
EAST ASIA/ PACIFIC LDCs	3,780	0.05

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009.

(v): Visitors. (wb): World Bank classification.

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update) and the World Bank's World Development Indicators.

1. Inbound tourism: Arrivals 2009

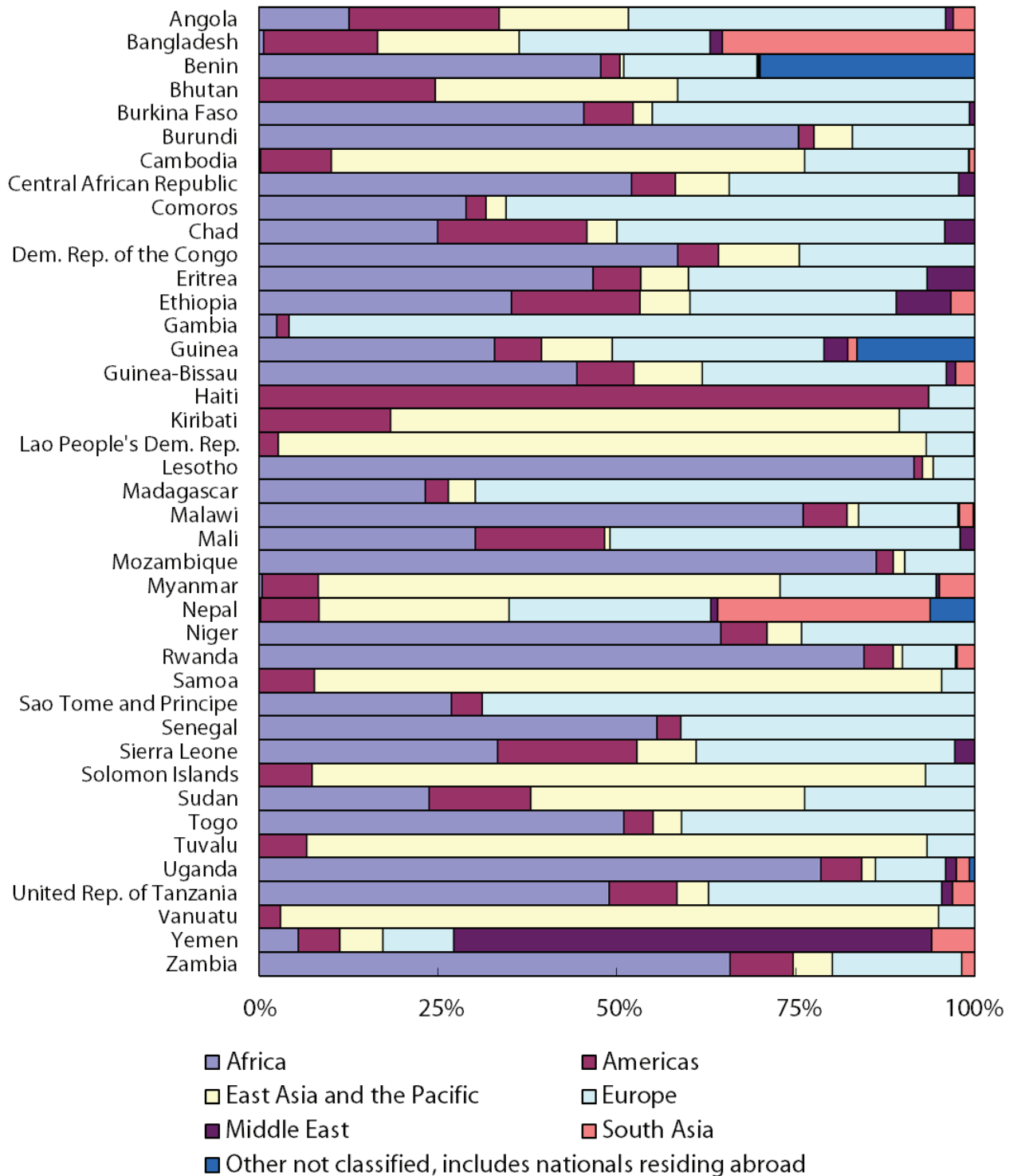
Least Developed Countries (LDCs)	Arrivals of non-resident overnight visitors (tourists) at national borders (Thousands)	Carrying capacity (arrivals/population) (Units)
Cambodia	2,046	0.14
Kiribati	4	0.04
Lao People's Democratic Republic	1,239	0.20
Myanmar	243	0.005
Samoa	129	0.72
Solomon Islands (2008)	16	0.03
Timor-Leste	-	-
Tuvalu	2	0.15
Vanuatu	101	0.42
MIDDLE EAST LDCs	434	0.02
Yemen	434	0.02
SOUTH ASIA LDCs	801	0.004
Afghanistan	-	-
Bangladesh	267	0.002
Bhutan	24	0.03
Nepal	510	0.02
TOTAL OTHER COUNTRIES	862,865	0.25
AFRICA OTHER COUNTRIES	15,033	0.04
AMERICAS OTHER COUNTRIES	131,412	0.29
EAST ASIA/ PACIFIC OTHER COUNTRIES	112,369	0.19
EUROPE OTHER COUNTRIES	564,019	1.67
MIDDLE EAST OTHER COUNTRIES	22,231	0.12
SOUTH ASIA OTHER COUNTRIES	17,801	0.01
TOTAL WORLD	935,527	0.15
AFRICA	24,999	0.03
AMERICAS	137,092	0.15
EAST ASIA/ PACIFIC	118,475	0.06
EUROPE	613,694	0.72
MIDDLE EAST	22,665	0.11
SOUTH ASIA	18,602	0.01
OECD	149,496	0.14
EUROPEAN UNION	317,326	0.69
DEVELOPED COUNTRIES (wb)	127,236	0.16
DEVELOPING COUNTRIES (wb)	436,927	0.08
MIDDLE INCOME COUNTRIES (wb)	474,233	0.15

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009.

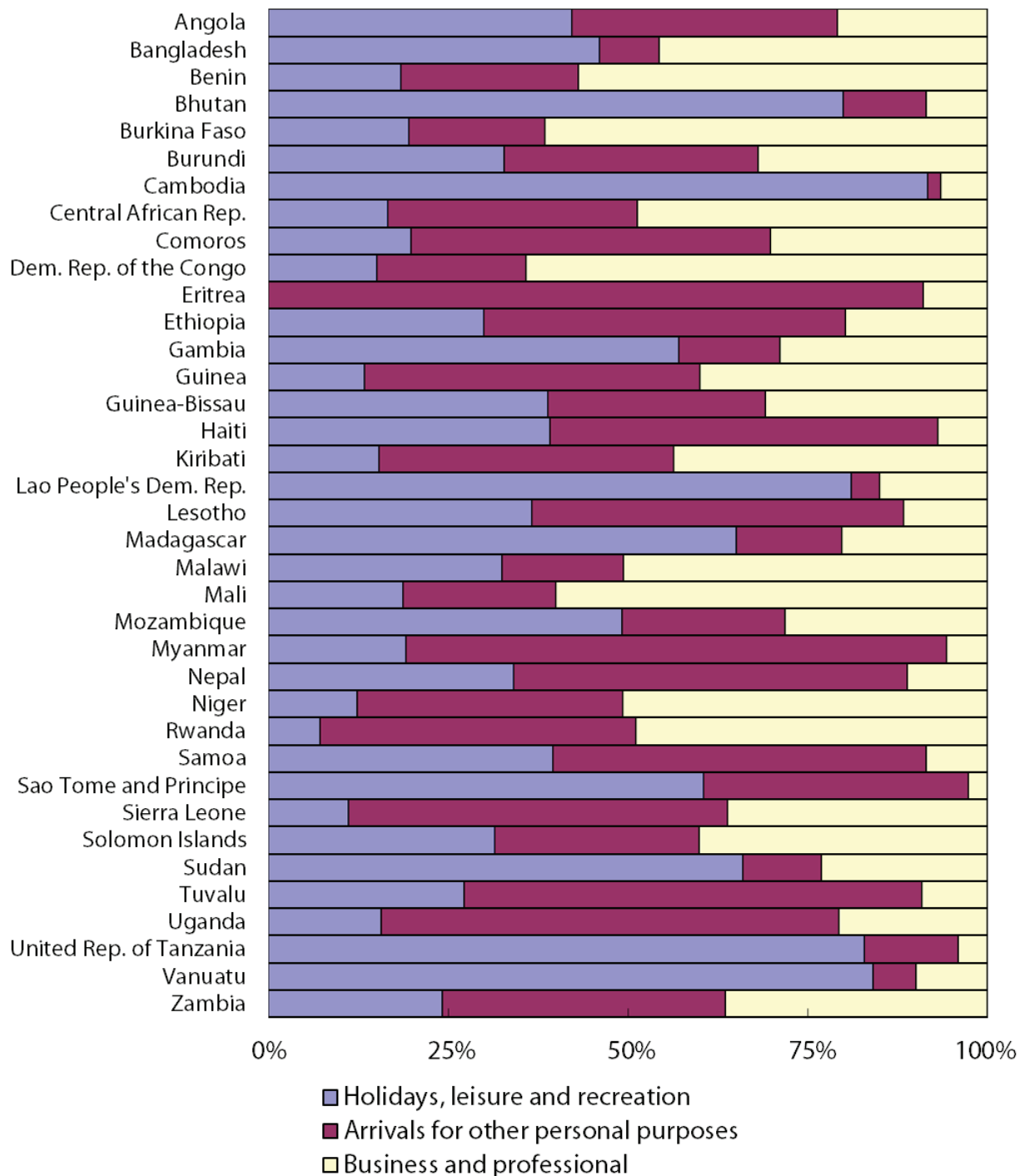
(v): Visitors. (wb): World Bank classification.

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update) and the World Bank's World Development Indicators.

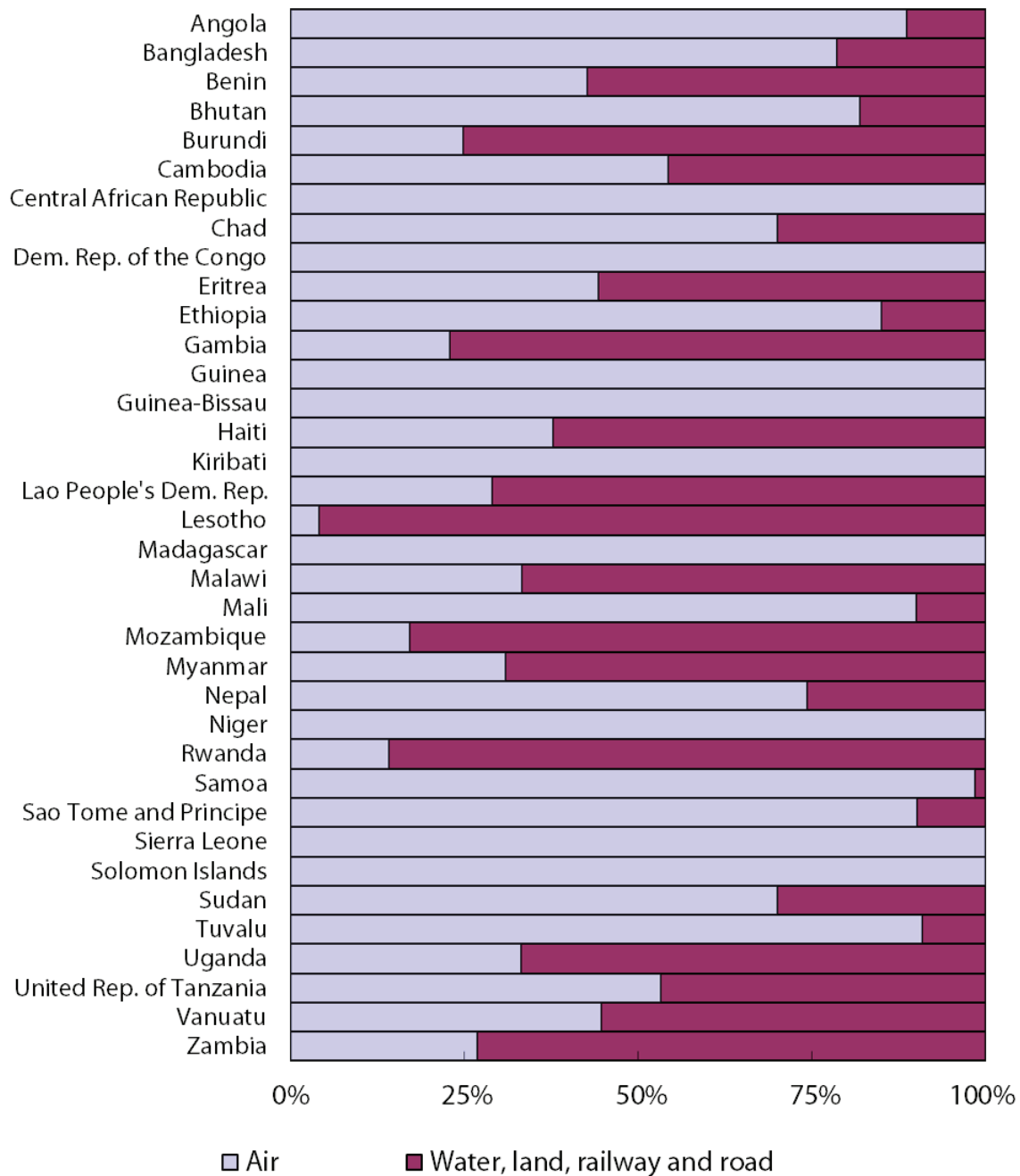
2. Arrivals by Region, 2009



3. Arrivals by Main Purpose, 2009



4. Inbound tourism: Arrivals by mode of transport, 2009



5. Accommodation: Overnights in hotels and similar establishments

Least Developed Countries (LDCs)	Inbound tourism (1)		Domestic tourism (1)	
	Thousands	%	Thousands	%
TOTAL LDCs	13,133	53.2	11,559	46.8
AFRICA LDCs	6,978	72.6	2,639	27.4
Angola	349	78.1	98	21.9
Benin	-	-	-	-
Burkina Faso	793	78.0	224	22.0
Burundi	-	-	-	-
Central African Republic	52	94.5	3	5.5
Chad (2007)	65	94.2	4	5.8
Comoros	-	-	-	-
Democratic Republic of the Congo	-	-	-	-
Djibouti (2008)	82	-	-	-
Equatorial Guinea	-	-	-	-
Eritrea	134	10.7	1,122	89.3
Ethiopia	-	-	-	-
Gambia	-	-	-	-
Guinea (2007)	249	-	-	-
Guinea-Bissau	-	-	-	-
Lesotho	-	-	-	-
Liberia	-	-	-	-
Madagascar	2,413	-	-	-
Malawi	-	-	-	-
Mali	353	79.3	92	20.7
Mauritania	-	-	-	-
Mozambique	424	49.5	433	50.5
Niger (2008)	161	82.1	35	17.9
Rwanda	-	-	-	-
Sao Tome and Principe	-	-	-	-
Senegal (2007)	1,335	85.7	223	14.3
Sierra Leone (2008)	250	-	-	-
Somalia	-	-	-	-
Sudan	-	-	-	-
Togo	318	77.0	95	23.0
Uganda	-	-	-	-
United Republic of Tanzania	-	-	-	-
Zambia	-	-	310	-
AMERICAS LDCs	6,978	72.6	2,639	27.4
Haiti	-	-	-	-

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009.

(1) Percents calculated on the basis of different sources for inbound tourism (border statistics) and domestic tourism (accommodation surveys and households surveys).

(wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update)

5. Accommodation: Overnights in hotels and similar establishments

Least Developed Countries (LDCs)	Inbound tourism (1)		Domestic tourism (1)	
	Thousands	%	Thousands	%
EAST ASIA/ PACIFIC LDCs	-	-	-	-
Cambodia	-	-	-	-
Kiribati	-	-	-	-
Lao People's Democratic Republic	-	-	-	-
Myanmar	2,068	77.5	601	22.5
Samoa	-	-	-	-
Solomon Islands	-	-	-	-
Timor-Leste	-	-	-	-
Tuvalu	-	-	-	-
Vanuatu (2007)	396	-	-	-
MIDDLE EAST LDCs	3,471	29.4	8,319	70.6
Yemen	3,471	29.4	8,319	70.6
SOUTH ASIA LDCs	220	-	-	-
Afghanistan	-	-	-	-
Bangladesh	-	-	-	-
Bhutan (2008)	220	-	-	-
Nepal	-	-	-	-
TOTAL OTHER COUNTRIES	-	-	-	-
AFRICA OTHER COUNTRIES	774,016	64.4	427,036	35.6
AMERICAS OTHER COUNTRIES	62,675	78.9	16,810	21.1
EAST ASIA/ PACIFIC OTHER COUNTRIES	96,378	57.9	70,217	42.1
EUROPE OTHER COUNTRIES	35,287	70.6	14,703	29.4
MIDDLE EAST OTHER COUNTRIES	265,247	60.9	170,643	39.1
SOUTH ASIA OTHER COUNTRIES	303,466	68.5	139,855	31.5
TOTAL WORLD	1,761,573	49.4	1,801,080	50.6
AFRICA	69,653	78.2	19,449	21.8
AMERICAS	305,656	62.1	186,540	37.9
EAST ASIA/ PACIFIC	253,412	35.8	455,021	64.2
EUROPE	814,733	45.5	977,088	54.5
MIDDLE EAST	306,937	67.4	148,174	32.6
SOUTH ASIA	11,183	43.0	14,808	57.0
OECD	10,963	42.5	14,808	57.5
EUROPEAN UNION	956,667	48.3	1,024,070	51.7
DEVELOPED COUNTRIES (wb)	678,210	44.5	846,840	55.5
DEVELOPING COUNTRIES (wb)	813,901	48.0	881,646	52.0
MIDDLE INCOME COUNTRIES (wb)	872,140	52.2	797,505	47.8

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009.

(1) Percents calculated on the basis of different sources for inbound tourism (border statistics) and domestic tourism (accommodation surveys and households surveys).

(wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update)

6. Inbound tourism: Expenditure 2009

Least Developed Countries (LDCs)	Total expenditure (US\$ Million)	Inbound tourism expenditure over GDP (%)	Expenditure – travel (US\$ Million)	Expenditure – travel over GDP (%)	Expenditure – passenger transport (US\$ Million)
TOTAL LDCs	9,989	4.0	8,424	3.8	1,564
AFRICA LDCs	6,697	2.7	5,349	2.5	1,348
Angola	554	0.7	534	0.7	20
Benin (2008)	236	3.5	236	3.5	0,4
Burkina Faso (2008)	82	1.0	62	0.8	20
Burundi	2	0.1	2	0.1	0,2
Central African Republic	6	0.3	5	0.2	2
Chad	-	-	-	-	-
Comoros (2006)	27	6.6	-	7.2	-
Democratic Republic of the Congo	-	-	-	-	-
Djibouti (2008)	16	1.5	16	1.5	-
Equatorial Guinea	-	-	-	-	-
Eritrea	26	1.4	-	-	-
Ethiopia	1,119	3.9	329	1.2	790
Gambia	64	8.7	63	8.6	1
Guinea	5	0.1	3	0.07	2
Guinea-Bissau (2007)	38	4.5	38	4.5	-
Lesotho (2008)	40	2.5	40	2.5	-
Liberia (2008)	123	14.0	123	14.0	-
Madagascar	518	5.7	308	3.4	210
Malawi (2007)	48	1.3	27	0.8	21
Mali (2008)	286	3.3	275	3.2	11
Mauritania	-	-	-	-	-
Mozambique	217	2.2	196	2.0	21
Niger (2008)	86	1.6	79	1.5	7
Rwanda	218	4.3	174	3.4	44
Sao Tome and Principe	8	4.3	8	4.3	-
Senegal (2008)	637	4.8	543	4.1	94
Sierra Leone	25	1.3	25	1.3	-
Somalia	-	-	-	-	-
Sudan	299	0.5	299	0.5	-
Togo (2008)	44	1.5	40	1.4	4
Uganda	683	4.3	667	4.2	16
United Republic of Tanzania	1,192	5.5	1,160	5.4	32
Zambia (2008)	98	0.8	98	0.8	-
AMERICAS LDCs	315	4.9	315	4.9	-
Haiti	315	4.9	315	4.9	-

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009 (wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update); International Monetary Fund's Balance of Payments and International Financial Statistics; the World Bank's World Development Indicators and the World Trade Organization's Balance of Payments dataset.

6. Inbound tourism: Expenditure 2009

Least Developed Countries (LDCs)	Total expenditure (US\$ Million)	Inbound tourism expenditure over GDP (%)	Expenditure – travel (US\$ Million)	Expenditure – travel over GDP (%)	Expenditure – passenger transport (US\$ Million)
EAST ASIA/ PACIFIC LDCs	1,957	8.7	1,782	8.0	175
Cambodia	1,312	13.3	1,185	12.0	127
Kiribati (2007)	4	3.2	4	3.2	-
Lao People's Democratic Republic	271	4.6	268	4.5	3
Myanmar (2006)	59	-	46	-	13
Samoa	116	23.4	116	23.4	0,2
Solomon Islands	52	8.0	44	6.7	8
Timor-Leste	-	-	-	-	-
Tuvalu	-	-	-	-	-
Vanuatu (2007)	142	26.1	119	21.9	23
MIDDLE EAST LDCs	496	1.9	496	1.9	-
Yemen (2008)	496	1.9	496	1.9	-
SOUTH ASIA LDCs	524	1.8	482	1.6	42
Afghanistan	-	-	-	-	-
Bangladesh	76	0.09	69	0.08	7
Bhutan	51	4.1	42	3.3	9
Nepal	397	3.2	371	3.0	26
TOTAL OTHER COUNTRIES	394,066	6.8	325,383	5.8	68,683
AFRICA OTHER COUNTRIES	27,603	6.3	22,155	4.9	5,448
AMERICAS OTHER COUNTRIES	49,625	7.3	38,627	7.1	10,998
EAST ASIA/ PACIFIC OTHER COUNTRIES	116,812	8.1	98,564	5.5	18,248
EUROPE OTHER COUNTRIES	137,708	4.6	118,846	4.0	18,861
MIDDLE EAST OTHER COUNTRIES	46,234	5.3	32,815	4.3	13,419
SOUTH ASIA OTHER COUNTRIES	16,084	9.0	14,375	8.7	1,709
TOTAL WORLD	1,017,588	5.6	856,418	4.8	161,169
AFRICA	34,300	4.0	27,504	3.4	6,796
AMERICAS	225,358	6.9	185,055	6.7	40,303
EAST ASIA/ PACIFIC	209,758	7.5	182,760	5.6	26,998
EUROPE	484,834	4.1	412,930	3.6	71,903
MIDDLE EAST	46,730	5.0	33,311	4.1	13,419
SOUTH ASIA	16,608	5.8	14,857	5.6	1,751
OECD	672,575	3.0	570,110	2.6	102,465
EUROPEAN UNION	400,016	4.3	340,148	3.7	59,868
DEVELOPED COUNTRIES (wb)	599,935	2.6	508,140	2.3	91,795
DEVELOPING COUNTRIES (wb)	359,176	6.2	299,216	5.3	59,960
MIDDLE INCOME COUNTRIES (wb)	278,255	7.9	242,596	6.5	35,659

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009 (wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update); International Monetary Fund's Balance of Payments and International Financial Statistics; the World Bank's World Development Indicators and the World Trade Organization's Balance of Payments dataset.

7. Outbound tourism: Expenditure 2009

Least Developed Countries (LDCs)	Total expenditure (US\$ Million)	Outbound tourism expenditure over GDP (%)	Expenditure – travel (US\$ Million)	Expenditure – travel over GDP (%)	Expenditure – passenger transport (US\$ Million)
TOTAL LDCs	6,580	2.8	4,617	1.4	1,963
AFRICA LDCs	4,287	1.7	3,333	1.3	954
Angola	270	0.4	133	0.2	137
Benin (2008)	102	1.5	64	1.0	38
Burkina Faso (2008)	110	1.4	63	0.8	47
Burundi	71	5.4	62	4.7	9
Central African Republic	61	3.0	52	2.6	9
Chad	-	-	-	-	-
Comoros	11	2.7	-	3.2	-
Democratic Republic of the Congo	-	-	-	-	-
Djibouti	18	1.7	6	0.6	12
Equatorial Guinea	-	-	-	-	-
Eritrea	-	-	-	-	-
Ethiopia	139	0.5	138	0.5	1
Gambia	9	1.2	8	1.2	1
Guinea	28	0.7	13	0.3	15
Guinea-Bissau (2008)	46	5.4	46	5.4	0,5
Lesotho	22	1.4	14	0.9	8
Liberia	51	5.8	29	3.3	22
Madagascar	123	1.4	74	1.4	49
Malawi (2007)	84	2.3	73	2.0	11
Mali (2008)	228	2.6	147	1.7	81
Mauritania	-	-	-	-	-
Mozambique	249	2.5	212	2.2	37
Niger (2008)	98	1.8	68	1.3	30
Rwanda	115	2.3	72	1.4	43
Sao Tome and Principe (2007)	0,4	0.2	0,1	0.07	-
Senegal (2008)	276	2.1	175	1.3	101
Sierra Leone	16	0.8	13	0.7	3
Somalia	-	-	-	-	-
Sudan	868	1.6	868	1.6	-0,2
Togo (2008)	68	2.3	19	0.7	49
Uganda	335	2.1	179	1.1	156
United Republic of Tanzania	806	3.7	766	3.5	40
Zambia	83	0.7	39	0.3	44
AMERICAS LDCs	442	6.8	63	1.0	379
Haiti	442	6.8	63	1.0	379

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009 (wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update); International Monetary Fund's Balance of Payments and International Financial Statistics; the World Bank's World Development Indicators and the World Trade Organization's Balance of Payments dataset.

7. Outbound tourism: Expenditure 2009

Least Developed Countries (LDCs)	Total expenditure (US\$ Million)	Outbound tourism expenditure over GDP (%)	Expenditure – travel (US\$ Million)	Expenditure – travel over GDP (%)	Expenditure – passenger transport (US\$ Million)
EAST ASIA/ PACIFIC LDCs	373	2.5	286	2.1	87
Cambodia	162	1.6	103	1.0	59
Kiribati	9	7.1	9	7.1	-
Lao People's Democratic Republic	91	1.5	83	1.4	8
Myanmar (2006)	40	-	37	-	3
Samoa	20	4.0	11	2.2	9
Solomon Islands	38	5.7	32	4.8	6
Timor-Leste	-	-	-	-	-
Tuvalu	-	-	-	-	-
Vanuatu (2007)	13	2.4	11	2.0	2
MIDDLE EAST LDCs	277	1.1	214	0.8	63
Yemen	277	1.1	214	0.8	63
SOUTH ASIA LDCs	1,202	2.0	722	1.7	480
Afghanistan	-	-	-	-	-
Bangladesh	651	0.7	249	0.3	402
Bhutan	40	3.2	39	3.1	1
Nepal	511	4.1	434	3.5	77
TOTAL OTHER COUNTRIES	290,387	2.7	238,780	2.2	51,607
AFRICA OTHER COUNTRIES	17,911	2.5	12,697	2.0	5,214
AMERICAS OTHER COUNTRIES	35,267	1.8	27,594	1.5	7,673
EAST ASIA/ PACIFIC OTHER COUNTRIES	77,270	2.0	67,823	1.6	9,446
EUROPE OTHER COUNTRIES	75,192	2.8	68,441	2.4	6,751
MIDDLE EAST OTHER COUNTRIES	61,142	3.7	42,614	3.2	18,528
SOUTH ASIA OTHER COUNTRIES	23,606	3.1	19,611	2.3	3,995
TOTAL WORLD	933,745	2.5	776,700	2.0	157,045
AFRICA	22,198	2.0	16,030	1.6	6,168
AMERICAS	179,769	1.8	138,180	1.5	41,589
EAST ASIA/ PACIFIC	189,665	2.0	162,385	1.6	27,281
EUROPE	455,886	2.7	396,944	2.4	58,941
MIDDLE EAST	61,419	3.5	42,828	3.0	18,591
SOUTH ASIA	24,808	2.6	20,333	2.0	4,475
OECD	631,309	2.4	529,127	2.2	102,182
EUROPEAN UNION	386,475	3.1	335,423	2.8	51,052
DEVELOPED COUNTRIES (wb)	587,974	2.3	488,549	2.1	99,425
DEVELOPING COUNTRIES (wb)	288,635	2.2	237,031	1.8	51,604
MIDDLE INCOME COUNTRIES (wb)	206,344	2.7	174,872	2.2	31,473

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009 (wb): World Bank classification

Source: UNWTO's Compendium of Tourism Statistics, 2011 Edition (Dec 2010 update); International Monetary Fund's Balance of Payments and International Financial Statistics; the World Bank's World Development Indicators and the World Trade Organization's Balance of Payments dataset.

8. Complementary indicators: Macroeconomic indicators related to international tourism, 2009

Least Developed Countries (LDCs)	Inbound tourism expenditure over GDP	Outbound tourism expenditure over GDP	Tourism balance (inbound minus outbound tourism expenditure) over GDP	Trade balance (exports minus imports of goods and services) over GDP	Tourism openness (inbound plus outbound tourism expenditure) over GDP	Trade openness (exports plus imports of goods and services) over GDP	Tourism coverage (inbound over outbound tourism expenditure)	Inbound tourism expenditure over exports of goods	Inbound tourism expenditure over exports of services	Inbound tourism expenditure over exports of goods and services	Inbound tourism expenditure over current account credits	Outbound tourism expenditure over imports of goods	Outbound tourism expenditure over imports of services	Outbound tourism expenditure over imports of goods and services	Outbound tourism expenditure over current account debits
TOTAL LDCs	4	2.8	3.1	-4.3	6.6	54.7	170.9	41.7	48.7	24.4	11.7	8.1	27.6	13.8	63.3
AFRICA LDCs	2.7	1.7	2	-12.1	4.4	53.2	209.2	19.7	38.7	19.4	13.8	5.1	14	7	56
Angola	0.7	0.4	0.4	-0.5	1.1	110.3	205.2	1.4	88.9	44.5	243.7	1.2	1.4	0.7	15.8
Benin (2008)	3.5 (a)	1.5 (a)	2	-11.5	5.1	60.3	231.8	18.4	67.9	34	18.6	5.4	20	10	35
Burkina Faso (2008)	1.0 (a)	1.4 (a)	-0.3	-26.3	2.4	44.8	74.5	13.1	68.3	34.2	4.1	4.8	19	9.5	30
Burundi	0.1	5.4	-5.2	-30.5	5.5	48	2.4	2.6	3.4	1.7	0.2	20.7	40.2	20.1	547.8
Central African Republic	0.3	3	-2.7	-	3.3	-	9.8	-	-	-	-	-	-	-	-
Chad	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Comoros	6.6 (c)	2.7 (c)	4	-	9.3	-	248.1	-	-	-	-	-	-	-	-
Dem. Rep. of the Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Djibouti	1.5 (t)	1.7	-0.1	-17.1	3.2	93.2	91.4	20.7	5	2.5	4.3	3.9	13.7	6.9	71.4
Equatorial Guinea	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Eritrea	1.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	3.9	0.5	3.4	-19.7	4.4	43.7	805	72.8	59.1	29.5	8	2	6.2	3.1	85.4
Gambia	8.7	1.2	7.5	-8.7	10	84.7	711.1	36.7	61.4	30.7	8.2	3.5	10.9	5.4	3.8
Guinea	0.1	0.7	-0.6	-6.6	0.8	61.2	17.5	0.5	6.8	3.4	1.4	2.6	8.5	4.2	13.6
Guinea-Bissau (2008)	4.5 (a,t)	5.4 (a)	-0.9	-13.2	10	53.8	82.9	29.8	87.3	43.6	8.3	23.2	54.1	27.1	70
Lesotho	2.5 (t)	1.4	1.1	-63.5	3.9	163.5	181.8	5.6	54.9	27.4	1.8	1.3	17.7	8.9	122.8
Liberia	14.0 (t)	5.8	8.2	-142.7	19.9	246.3	241.2	68.3	44.9	22.4	2.8	9.1	4.5	2.2	-
Madagascar	5.7	1.4	4.4	-	7.1	-	421.1	34.8	58.2	29.1	25.8	5.6	13	6.5	44.6
Malawi (2007)	1.3 (b)	2.3 (b)	-1	-	3.7	-	57.1	-	-	-	-	-	-	-	-
Mali (2008)	3.3 (a)	2.6 (a)	0.7	-13.9	5.9	72.4	125.4	13.6	63	31.5	12.9	8.3	22.3	11.1	57.5
Mauritania	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	2.2	2.5	-0.3	-18.8	4.8	69.1	87.1	11.7	35.5	17.7	5.8	7.7	23.4	11.7	37.2
Niger (2008)	1.6 (a)	1.8 (a)	-0.2	-16.9	3.4	55.9	87.6	9.4	65.6	32.8	8.4	7.3	16.3	8.2	104
Rwanda	4.3	2.3	2	-18.7	6.6	39.8	189.6	113.1	63.9	32	8.3	12	22.2	11.1	56.8
Sao Tome and Principe (2007)	4.3 (t)	0.2	4.1	-43.1	4.5	63.5	2075.0	90.1	79.5	39.8	18.4	0.5	2.1	1.1	1.5

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009. (t): Only travel expenditure. (wb): World Bank classification. (a) 2008 data. (b) 2007 data. (c) 2006 data.

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8. Complementary indicators: Macroeconomic indicators related to international tourism, 2009

Least Developed Countries (LDCs)	Inbound tourism expenditure over GDP	Outbound tourism expenditure over GDP	Tourism balance (inbound minus outbound tourism expenditure) over GDP	Trade balance (exports minus imports of goods and services) over GDP	Tourism openness (inbound plus outbound tourism expenditure) over GDP	Trade openness (exports plus imports of goods and services) over GDP	Tourism coverage (inbound over outbound tourism expenditure)	Inbound tourism expenditure over exports of goods	Inbound tourism expenditure over exports of services	Inbound tourism expenditure over exports of goods and services	Inbound tourism expenditure over current account credits	Outbound tourism expenditure over imports of goods	Outbound tourism expenditure over imports of services	Outbound tourism expenditure over imports of goods and services	Outbound tourism expenditure over current account debits
Senegal (2008)	4.8 (a)	2.1 (a)	2.7	-26.7	6.9	79.9	230.8	28.9	49.2	24.6	8	4.9	19.5	9.8	22.9
Sierra Leone	1.3 (t)	0.8	0.5	-15.7	2.1	49	158.2	9.2	47.4	23.7	4.1	3.1	13.6	6.8	117.6
Somalia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	0.5 (t)	1.6 (t)	-1	-5.5	2.1	35.5	34.4	3.8	76.3	38.1	2.2	10.2	32.3	16.2	11.1
Togo (2008)	1.5 (a)	2.3 (a)	-0.8	-18.3	3.9	96.7	64.7	5.2	15.5	7.8	2.9	5.2	18.9	9.5	27.7
Uganda	4.3	2.1	2.2	-7.8	6.3	57.1	203.9	22.9	70.7	35.3	11.3	8.8	23.6	11.8	22.1
United Rep. of Tanzania	5.5	3.7	1.8	-10.7	9.2	59	147.9	35.4	64.3	32.1	39.7	13.8	47.2	23.6	294.4
Zambia	0.8 (t)	0.7	0.1	3.5	1.4	68.1	118.1	2.3	40.7	20.3	4.4	2.4	11.8	5.9	56.1
AMERICAS LDCs	4.9	6.8	5.5	-7.5	11.7	57.8	71.3	57.2	82.5	41.3	4.4	21.8	56.6	28.3	82
Haiti	4.9 (t)	6.8	0.1	-29	11.7	57.8	71.3	57.2	82.5	41.3	4.4	21.8	56.6	28.3	82
EAST ASIA/ PACIFIC LDCs	8.7	2.5	5.6	0.7	10.1	49.7	340.8	108.4	44.2	22.1	30.1	4.8	20	10	68.8
Cambodia	3.2 (t)	7.1 (t)	0.1	0.1	14.9	129.9	809.9	30.5	80.7	40.4	55.1	2.8	15.8	7.9	189.7
Kiribati	3.2 (t)	7.1 (t)	-	-	-	-	-	-	-	-	-	-	-	-	-
Lao People's Dem. Rep.	4.6	1.5	3	-2.3	6.1	50.9	297.8	25.7	69.2	34.6	38	6.2	75.7	37.9	158.3
Myanmar	-	-	-	-	-	-	147.5	1.3	21.1	10.6	9.1	1.7	7.1	3.6	25.6
Samoa	23.4	4	19.4	-22.5	27.4	92.7	581	462.8	77.9	39	21	9.6	25.6	12.8	61.7
Solomon Islands	8	5.7	2.2	-15.6	13.7	87.4	139	32.1	72.3	36.1	11	15.8	38.1	19.1	76.8
Timor-Leste	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuvalu	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Vanuatu	26.1 (b)	2.4 (b)	23.7	-6	28.5	86.6	1092.3	423.2	76.4	38.2	136.4	7.4	17.2	8.6	107.6
MIDDLE EAST LDCs	1.9	1.1	0.8	5.5	2.9	64.8	179.1	8.5	40.1	20	7.6	3.5	13	6.5	61.1
Yemen	1.9 (t)	1.1	0.8	-11	2.9	64.8	179.1	8.5	40.1	20	7.6	3.5	13	6.5	61.1
SOUTH ASIA LDCs	1.8	2	3.2	-9.9	3.8	48	54.2	14.7	38.2	19.1	2.8	5.5	34.6	17.3	48.3
Afghanistan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bangladesh	0.09	0.7	-0.6	-6.9	0.8	45	11.7	0.5	3.9	2	0.2	3.3	19.1	9.6	62.1
Bhutan	4.1	3.2	0.9	-12.8	7.2	94.6	127.5	11.2	88.1	44.1	8.4	6.6	54	27	15
Nepal	3.2	4.1	-0.9	-28.7	7.2	52.5	77.7	47.2	60.8	30.4	2.8	11.9	65.1	32.6	116.3

Methodological note: Totals based on latest available year for each country so that the totals do not exactly correspond to the total for 2009. (t): Only travel expenditure. (wb): World Bank classification. (a) 2008 data. (b) 2007 data. (c) 2006 data.

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TOTAL OTHER COUNTRIES	6.8	2.7	3.1	-4.3	9.6	72.8	241.8	58.5	35.3	17.7	90.8	7.3	20.7	10.4	99.1
AFRICA OTHER COUNTRIES	6.3	2.5	2	-12.1	8.8	75.8	208.4	37.2	39.7	19.9	30.1	7.9	20	10	82
AMERICAS OTHER COUNTRIES	7.3	1.8	5.5	-7.5	10.2	66.5	313	87.3	40.9	20.4	65	5.6	19.2	9.6	283.8
EAST ASIA/ PACIFIC OTHER COUNTRIES	8.1	2	5.6	0.7	10.2	78.5	468.6	12.2	29.2	14.6	283.4	6.9	16.3	8.2	41.7
EUROPE OTHER COUNTRIES	4.6	2.8	1.3	-2.5	7.3	83.9	172.6	25.8	30	15.7	105.1	7.3	1.4	12	47.7
MIDDLE EAST OTHER COUNTRIES	5.3	3.7	0.8	5.5	9.2	79.8	135.4	23.3	37	13	11.1	11.6	23.5	10	38.2
SOUTH ASIA OTHER COUNTRIES	9	3.1	3.2	-9.9	12.1	52.6	153	12.2	33.6	16.8	75.2	6.4	21.4	10.7	30
TOTAL WORLD	5.6	2.5	3.1	-4.3	8.2	67.6	218.5	49.1	36	18	69.8	7	21.8	10.9	101.9
AFRICA	4	2	2	-12.1	6	61.5	208.9	26.1	39.1	19.5	19.7	6.1	16.2	8.1	65.5
AMERICAS	6.9	1.8	5.5	-7.5	9.8	65.2	296.8	82.1	41.9	21	64.7	6	20.8	10.4	334.1
EAST ASIA/ PACIFIC	7.5	2	5.6	0.7	9.3	66.1	401.7	93.2	32.3	16.1	203.4	5.3	18.1	9	51.1
EUROPE	4.1	2.7	1.3	-2.5	6.8	83.4	155.9	21.9	30	15	90.7	7.8	25.6	12.8	42.9
MIDDLE EAST	5	3.5	0.8	5.5	8.7	78.7	138.5	22.2	37.3	18.6	10.8	11	22.7	11.4	39.8
SOUTH ASIA	5.8	2.6	3.2	-9.9	8.4	50.5	109.1	49	35.6	17.8	29	6	27.3	13.6	77.8
OECD	3	2.4	0.5	3.5	5.4	85.6	140.6	12.2	30	15.9	148	8.5	27.9	13.9	151.9
EUROPEAN UNION	4.3	3.1	1.2	2.5	7.5	103.8	146.1	18.8	30	15	41.2	8.8	27.8	13.9	25.9
DEVELOPED COUNTRIES (wb)	2.6	2.3	0.3	3.3	4.9	71	112.1	12.2	25.9	13	163.3	8.8	25.6	12.8	37.8
DEVELOPING COUNTRIES (wb)	6.2	2.2	4	-6.3	8.7	66.6	277.2	62	38.3	19.1	75.2	6.4	19.3	9.7	143
MIDDLE INCOME COUNTRIES (wb)	7.9	2.7	5.3	-5.8	10.5	83.3	334.7	56.9	47.4	23.7	49.6	6.9	25.5	12.7	237.5

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Annex II: Countries with DTIS and DTIS Updates Included in the Study

	Country	Year	Update	Year
1.	Angola	2007	No	
2.	Benin	2005	No	
3.	Cambodia	2001	Yes	2007
4.	Cape Verde	2009	No	
5.	Central African Republic	2007	No	
6.	Comoros	2007	No	
7.	Djibouti	2004	No	
8.	Ethiopia	2004	No	
9.	Gambia, The	2007	No	
10.	Guinea	2003	No	
11.	Lao PDR	2006	No	
12.	Lesotho	2003	No	
13.	Madagascar	2003	No	
14.	Malawi	2004	No	
15.	Maldives	2006	No	
16.	Mali	2004	No	
17.	Mauritania	2001	Yes	2007
18.	Mozambique	2004	No	
19.	Nepal	2003	Yes	2010
20.	Niger	2008	No	
21.	Rwanda	2005	No	
22.	Sao Tome and Principe	2006	No	
23.	Senegal	2003	No	
24.	Sierra Leone	2006	No	
25.	Solomon Islands	2009	No	
26.	Tanzania	2005	Yes	2009
27.	Uganda	2006	No	
28.	Vanuatu	2007	No	
29.	Yemen	2003	No	
30.	Zambia	2005	No	

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