NATIONAL TOURISM DEVELOPMENT PLAN (2013 – 2027)

REPUBLIC OF GHANA

FOREWORD

The Government of the Republic of Ghana committed itself to a planned approach to the development of the tourism sector through the implementation of the Integrated Tourism Development Programme which culminated into the preparation of the 15-Year National Tourism Development Plan (1996-2010). The Plan positioned the tourism sector as a consistent driver of growth and development as evidenced by increases in public and private sector investments in tourism facilities, arrivals and receipts, employment and contribution to Gross Domestic Product (GDP).

Building on the success of the first 15-Year National Tourism Development Plan, the Ministry of Tourism with financial and technical support from UNDP, UNECA and UNWTO, has articulated a successor National Tourism Development Plan (2013-2027) to provide stakeholders in the public and private sectors, a guide to the long-term development of the tourism sector. This is against the backdrop of successes achieved, the challenges that continue to impact negatively on the sector, as well as competition from other sectors and countries.

This 15-Year National Tourism Development Plan (2013-2027) assesses how tourism can contribute to national and local economic development and enhance its role as a leading sector for employment creation, revenue generation, environmental conservation and national cohesion and overall economic growth. The Plan has, therefore, been prepared with the aim of positioning tourism in the national development agenda, as well as achieving the core objectives of the Ghana Shared Growth and Development Agenda (GSGDA) and the Millennium Development Goals (MDGs).

There is a high expectation among stakeholders that the Plan will promote increased investments in the supply and value chain linkages, product development, infrastructure, marketing and promotion, human resource development and research, as well as information, communication and technological advancement in the tourism sector.

The National Tourism Development Plan is a product of wide consultative processes involving interviews, focus group discussions and workshops to elicit views from diverse stakeholders. This reflects the multi-faceted nature of tourism and the extent to which the Ministry of Tourism has built consensus and partnerships for both the public and private sectors to collectively own the reviewed National Tourism Development Plan.

On behalf of the Government of Ghana and the United Nations, we wish to express our deep appreciation to the Government of Ghana (GoG), the United Nations Development Programme (UNDP) Ghana, United Nations Economic Commission for Africa (UNECA), World Tourism Organization (UNWTO) and all stakeholders in the tourism sector in Ghana for their interest and financial and technical support leading to a positive outcome. We look forward to the collective support of all stakeholders in the implementation of the Plan and to making Ghana the preferred tourism destination in Africa.

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NOVEMBER, 2012

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Table of contents

List of tables

List of figures

Executive Summary

While not considered a mainstream economic activity in a country successfully exploiting oil and gas, cocoa, gold, and diamonds tourism is nonetheless becoming recognised as an increasingly important sector in Ghana that generates employment and reduces poverty. Accordingly, a Tourism Act was promulgated in 2011 to support the development of the industry and to assure the quality of services that it provides. Ghana is blessed with excellent natural, cultural and heritage resources such as historical forts and castles, national parks, a beautiful coastline, unique arts, cultural traditions as well as a vibrant lifestyle, which when further developed and properly packaged and marketed, will continue to form the basis of a tourism offer that will attract a range of markets.

In 1996, a National Tourism Development Plan (referred to in the text as the1996-2010 Plan) was formulated by the Government with the assistance of United Nation World Tourism Organization (UNWTO) and the United Nations Development Programme (UNDP) with a 15-year horizon to stimulate the development of the sector. This plan engendered actions that have developed and progressed the sector over the years, which has been growing above world and regional average driven by the strong overall performance of Ghana's economy, the enabling business environment generating important demand for business travel and the country's reputation for political stability and safety in a volatile region.

With renewed interest in the sector and the conclusion of the 1996-2010 Plan the time is apposite to examine progress made and take stock, identify barriers that have been (and are still) hampering the development of the sector, propose a strategic direction to embark on and define activities to achieve the national goals expressed in the Ghana Shared Growth and Development Agenda (GSGDA) as well as those of the United Nations Millennium Development Goals (MDGs). Hence, the Government of Ghana is keen on promoting sustainable growth to convert tourism into a leading sector in the national economy and has commissioned an update to the 1996-2010 Plan.

The structure and performance of the tourism sector in Ghana: The number of star-rated hotels in Ghana has grown from 1,345 in 2005 to 1,747 in 2010. The majority are in the 1- and 2-star categories although several higher category hotels are in the construction phase, mostly in Accra. Greater Accra dominates the supply of hotels particularly at the 2- to 5-star category levels but the quality of regional hotel supply is improving as Cape Coast, Takoradi, West Coast, and Kumasi have seen the opening of new higher category hotels. In addition to the star-rated hotels, there are 137 guesthouses, 1176 budget and 67 supplementary accommodation establishments around the country. Hotel occupancy rates, especially in star-rated hotels, have been relatively high during the past decade. Ghana Tourism Authority (GTA) statistics show roughly 80 per cent occupancy rates on average for 4-star rated hotels.

The figures for licensed travel agents and tour operators, show an absolute decline in the number of businesses in this sector over the period 2005 to 2010 from 211 to 164, however, it is also clear that the greatest decline has been in the category of travel and tour operators without an International Air Transport Association (IATA) licence, which suggests that the sector itself is becoming more professional and thus a stronger and more effective component of the tourism sector. Based on stakeholder interviews in October 2012, the majority of incoming tourism business is handled by roughly ten travel agencies and tour operators. The licensed car rental sector shows a healthy growth from 53 companies in 2005 to 92 in 2010. The licensed restaurants and night clubs sector has remained essentially the same absolute size over the period 2005 to 2010 (366 to 359).

The country's location, stability, and rising role as a regional business hub have resulted in an increase in the number of flight connections internationally and domestically. Airline capacity has grown rapidly, from 24 carriers servicing Ghana in June 2011 to 34 by July 2012, with expectations of six more added by the end of 2012. Domestic flights have also received a boost as internal traffic rose 60 per cent in 2011 following an increase in the number of airlines connecting Ghana's five airports and the offering of more affordable flights.

The tourism economy in Ghana: Ghana's tourism sector has been visualised as a major potential engine of growth and development since the 1970s. Efforts to systematically provide the enabling environment for its development never materialised economically until the 1996-2010 Plan was formulated and launched. Chapter 8 of the 1996-2010 Plan tackled, *inter alia,* the economic impact of tourism on the Ghanaian economic and provided the case for the prioritisation of the sector. The current long-term plan and its sections on economic impact of tourism are, therefore, sequels to the first plan. In undertaking the study, the methodologies, outcomes and current government priorities and economic growth expectations were taken into account to develop a set of reliable criteria for the projections of the impact indicators. Primary emphasis has been on international tourism.

The impact indicators under review included 1) tourist arrivals, 2) receipts/foreign exchange generation, 3) employment creation, 4) income generation and 5) fiscal impact, i.e. tax revenue generation. Other developmental factors considered included economic growth, poverty reduction and tourism nexus. The results obtained in the analysis of the relevant issues are provided below.

The trends in tourist arrivals during the last plan show that the sector has been undergoing a steady growth. For the current National Tourism Development Plan - 2013-2027 (referred to in the text as the 2013-2027 Plan), it is projected to rise quite rapidly from the 2010 level of 746,500 to 993,600 thousand in 2013; with receipts of USD 1.5 billion in 2017; 2.5 billion in 2022; and 4.3 billion in 2027. These are conservative projections, which will depend primarily on the policy stance of government. It is in this respect that the political will of the government to prioritise the sector will be deemed crucial.

The gross contribution of foreign exchange to GDP generated by tourism will rise from the 2010 level of 4.3 % in 2010 to 4.7% in 2013 and will continue the gradual rise as follows: 5% in 2017, 5.20% in 2022 and to finally reach 5.70% in the terminal year of the 2013-2027 Plan. It can be inferred from the figures that the growth of the oil and gas industry would dampen the influence of the tourism sector on GDP during the plan period. An equally rewarding approach is the consideration of the net foreign exchange generated after the various foreign exchange leakages that go into importation of goods and services and the repatriation of profits are factored out. However, as the economy undergoes structural transformation, the extent of leakage is expected to decrease because of availability of local supplies.

High aggregate employment and incomes are expected from the sector during the Plan period because of its labour-intensive characteristics. The latter aspect offers the economy the potential for absorbing the growing surplus labour in the system. The estimates show that total employment figures (direct plus indirect) will rise from the 2010 level of 231,000 to 319,000 in 2013 and further rise to 487,000 in 2017, the initial and terminal years of the first Phase of the 2013-2027 Plan. The projected trends for the terminal years of the remaining two phases provide some hope for the labour market and poverty reduction, especially in the destination areas. The corresponding income generation trends partially reinforce the foregoing assessment, provided a vigorous policy and implementation effort will be made to develop domestic tourism. In terms of income generation, extrapolations made from the previous study and the limited information and data available gives quite a bright future. Total projected income will rise from the 2010 level of USD 194 million to USD 286 million in 2013 and reach USD 439 million in 2017, It will continue to rise in subsequent years until it reaches USD 1.3 billion in the terminal year of Phase 3 (2027).

From the Ghana Revenue Authority (GRA), the Ghana Immigration Service (GIS) and the Ghana Tourism Authority (GTA), destination surveys, research methodologies and results from the previous study, extrapolations have been made to generate the fiscal (tax revenue) contributions of tourism to the economy. The outcome shows that the sector could generate as much as USD 204.9 million in 2013 and reach USD 391.9 million in 2017. By the terminal year of the Plan (2027) the figure will be above USD 2.0 billion. A closer look at the sector seems to indicate that there may exist some level of differentiated tax compliance. There is, therefore, the need for a thorough study of the compliance system in order not only to widen the tax net but also to close the loopholes in the system.

The sectoral linkage aspect of the previous study and its subsequent re-visit for this Plan, clearly shows that tourism has very limited linkage with other sectors. Coupled with a high foreign exchange leakage, efforts must be made to raise the linkage in order to enhance the supply and value chains. Of particular concern is the agricultural sector where there are high concentrations of the poor. In other words, a tourism policy that seeks the use of domestic agricultural produce will go a long way to reduce the incidence of poverty. A case in point is government support for producers who specialise in crops for the hotel industry.

Over the years, there has been just a token policy approach to the development of domestic tourism to supplement the gains from international tourism. Currently, economic statisticians rank Ghana as a middle-income country. If the structural changes in the economy continue, then the time may be ripe for inculcating in the youth the essence of travel beyond their parochial locations for excursions to tourism landmarks in the country. Beyond the economic gains, there will emerge socio-political benefits for an enlightened citizenry.

The constraints on the development of the sector have been analysed in the text. However, the two most critical ones are worth mentioning at this juncture. The sector critically lacks the statistical base for policy formulation and evaluation. Under such circumstances, even relevant research findings which may be policy rewarding are bound to be shelved to gather dust because the ultimate decision makers have no confidence and interest in such findings and recommendations. Secondly, the marginalisation of the sector in the overall policy framework must be reversed. Adequate funding must be available for the implementing agencies i.e. Ministry of Tourism (MOT) and GTA. Finally, the oil curse, as captured by the proverbial *Dutch Disease* must engage the attention of government and, consequently, the need to consider tourism as a potentially viable outlet for ensuring the diversification of the economy.

The tourism statistical system: The existing system of tourism statistics has suffered from significant weaknesses for many years and this situation appears to have been brought about through a combination of institutional and financial shortcomings that have led to operational compromises, capacity constraints and the abandonment of a previous programme of statistics improvement.

It is equally clear that the current system of tourism statistics lacks the authority to transparently represent the key performance indicators of the tourism sector such as international visitor arrivals, visitor arrival characteristics and expenditure, and unless the political commitment and financial resources to address this inadequacy are made available, the fundamental basis for understanding the economic and social contribution of tourism to the economy will be further compromised and also undermine the effective planning and development of the sector.

The 2006-2010 Plan correctly identified the general weaknesses in data collection but failed to present a clear direction for overcoming the inadequacies. The missing policy recommendation which must be introduced is the commitment to the development and introduction of the Tourism Satellite Account (TSA), a methodology for measuring the contribution of tourism to Gross Domestic Product (GDP) which is highly demanding in terms of information and thus the existence of a robust system of tourism statistics but whose recommended implementation offers an institutional framework through which this complex, multi-stakeholder process of tourism statistics strengthening can be managed.

The UNWTO recommended approach to developing the TSA is through the introduction of an Inter-Institutional Platform (I-IP) through which a cooperative and collaborative forum is established for the various public and private sector bodies such as the Ministry of Tourism (MOT), Ghana Tourism Authority (GTA), Ghana Statistical Service (GSS), Ghana Immigration Service (GIS), Ministry of Finance (MOF), Bank of Ghana (BOG) and private sector trade associations that produce and use tourism statistics, to identify shortcomings, design solutions and implement recommendations. The establishment of just such a Committee was undertaken around the time of the publication of the Draft Tourism Policy but this was disbanded following a failure of political and financial commitment to its recommendations and little was achieved. Implementation of the policy supporting the introduction of the TSA demands that the I-IP be re-established and led from a technical perspective by the GSS.

As a matter of urgency, the GTA and GIS must re-establish a dialogue and cooperate over the collection, analysis and dissemination of international tourist arrivals data to recover the transparent accuracy and authoritative nature of the figures, which has been lost for some years. Discussions should also be held over improvements to the design of the current entry/exit card and to work with GIS to introduce a training programme for Immigration and Border Officials which will lead to their better understanding of tourism and improved handling of tourism data.

GTA must also, as a priority, speak with Ghana Airports Company Ltd (GACL) to secure the necessary permissions, which will allow the re-introduction of the visitor expenditure survey at Katoka International Airport. This is a fundamental data collection instrument, which has not been undertaken for a number of years and is critical to our understanding of the pattern and value of tourism expenditure and visitor perception of Ghana as a visitor destination.

The existing GTA Hotel Occupancy Rate Survey, which is conducted nationally, suffers from a poor response rate, resulting in the collection of limited data with limited value. A review of the conduct of this survey is essential including consideration of integrating it within the new Tourism Levy questionnaire and the provision of further training of private sector hoteliers to improve their understanding of the survey requirements.

The existing GTA Accommodation Statistics Survey experiences such a poor response rate that the data collected is too small for analytical purposes and thus is not used. A complete review of this survey is necessary from questionnaire design through to implementation including examination of GTA technical capacity in their regional offices, the capacity of GTA staff in Accra and the training implications for private sector hoteliers of the introduction of a new survey. Consideration should also be given to the conduct of this survey by experienced technical staff in the existing regional network of offices operated by GSS.

An Inbound and Outbound Tourism Survey is one of the surveys required to be introduced as part of the strengthening of the system of tourism statistics and the development of the TSA and this could be structured, implemented, managed and results analysed by GSS with guidance from international technical advisors.

Capacity building and training of GTA statistics staff is required in data handling, analysis and reporting techniques as well as in knowledge of tourism concepts, definitions and classifications for tourism statistics and in relation to the introduction of the TSA. I-IP committee members could also benefit from training seminars in tourism concepts, tourism statistics and the TSA while technical assistance will be needed in due course when compilation and completion of the various TSA tables is needed for the production of the first TSA results. This could also be delivered through the introduction of international technical advisors.

Tourism infrastructure and services: There have been significant improvements in tourism infrastructure and services, since the 1996-2010 Plan. In respect of international air access, carriers have doubled from approximately 15 to 30 and Kotoka, Accra's international airport, has expanded. However, airport taxes and aviation fuel costs are relatively high and expansion of the airport is barely keeping pace with demand. The number and choice of internal flights has also increased. Access for tourists within Ghana is primarily by road, and much of the existing highway network is in poor condition with congestion adding to journey times and the overall discomfort of travel. There are only very limited alternative options of rail or water transport, although new initiatives and proposals offer scope for both – including significant enhancement of water transport on Lake Volta. New highway proposals should improve journey times and the convenience and comfort of road travel. Water and electricity supplies are expanding, as is demand, and all tourist areas are serviced. However, the need for generators to provide back-up power supplies adds to accommodation costs.

Marketing: International and domestic tourism has been and still is increasing steadily in Ghana. Ghana's tourism market structure, however, is dependent on business segment and six major international markets. Real leisure tourism has been very limited up-to-today. Therefore the development goals of marketing are a) to raise awareness about Ghana in the major source markets, b) to establish leisure tourism in Ghana and c) to diversify tourism market structure from business and volunteer tourism to leisure tourism segments.

In order to achieve these goals, a phased marketing strategy approach is recommended: consolidation of current international markets and focus on domestic markets in the short-term while developing the product for expansion and expanding to new international markets in the medium and long-term.

In the short-term, marketing activities in North America and Europe should concentrate on building awareness about Ghana as a tourist destination among both the travel trade and the general public. These activities will also raise the interest of stakeholders to start developing specialised tours and to improve the quality of the product to provide more value for money.

Awareness raising and image building needs well-organised and coordinated promotion involving editorial coverage in appropriate media, tour operator support (selected tour operators targeting the desired markets and market segments should be assisted by providing them with specific material including photos, information on new developments), provision of well-designed and quality information via a website and in printed collateral materials as well as on social media.

Public-private sector working group on marketing should be set up. Effective public-private partnership is the key in marketing Ghana as a leisure tourism destination. Joint marketing action plan, which specifies roles and responsibilities, should first be agreed upon and then implemented by the responsible parties. The action plan should be reviewed on an annual basis and revised based on the achievements and market research results.

The marketing budget should be increased to implement the branding and marketing strategies. If Ghana is not known in the markets, it will not be included in the 'shopping-list' of prospective customers. Therefore marketing is the key!

Tourism resources: A key strength of Ghana's tourism appeal is the overall diversity of resources. These include: the UNESCO designated World Heritage Sites – forts and castles, and Asante traditional buildings; other traditional architecture such as in the North, the extensive protected areas within Ghana and the diversity of resources that they contain; the depth and significance of cultural traditions within the country, together with the accessibility for tourists to engage with it; and, not least, the genuine and general friendliness of Ghanaian people and, on the whole, their positive attitude to tourists. The quality of the resources suffer, generally, from poor standards of cleanliness and sanitation, particularly in public areas and from the effectiveness of some authorities, including the District Assemblies, to enforce planning control and guidance which has led to inappropriate development to the detriment of tourist resources. The Ghana Museums and Monuments Board does not have sufficient resources to adequately protect the heritage buildings within the country and there is a danger that these assets will be irreparably damaged. Interpretation, signage and information are generally weak.

Structure plan for tourism: The current structure plan for tourism within Ghana is based on the triangle of resources formed by Accra (as the principal arrival point and capital), Kumasi and Cape Coast/Elmina/Kakum. There are off-shoots from this core, including the West coast beaches, Mole National Park and short trips from Accra to destinations such as Ada, Shai Hills and Akosombo. The proposed strategy for the tourism structure plan for 2013 – 2027 is to combine the consolidation and enhancement of existing resources with the development of new attractions, which will expand the overall framework and extent of tourism within Ghana. This expansion is to be phased and linked with infrastructure improvements that are currently planned within the country. Establishing a stronger South-North movement corridor along Volta Lake and the highway to the East of the lake, will help strengthen the tourism connections to Tamale, Mole and the North and form the Eastern part of an enhanced triangle of tourism resources connecting Accra, Tamale and Kumasi.

Institutional framework: Public sector tourism institutions in Ghana comprise the Ministry of Tourism, the Ghana Tourism Authority, which was established by the Tourism Act 817 in 2011 to replace the Ghana Tourist Board, the Ghana Tourism Development Corporation (GTDC) and the Hotel, Catering and Tourism Training Institute (HOTCATT). Private sector institutions include several peak associations, which are collectively represented by the Ghana Tourism Federation (GHATOF).

The 2013-2027 Plan recommends a number of actions and improvements as well as some restructuring to ensure that the institutional framework for tourism is better coordinated and effective. These include designating the Ministry as a technical Ministry, addressing leadership instability at both the Ministry and the GTA and recruiting professionals to manage the GTA rather than political appointees, improving the working environment and conditions, building the capacity of officers at the institutions, strengthening the use of Information Technology, the 'Monitoring and Evaluation' function as well as the 'Communication and PR' function, creating new desks at the MOT and GTA to handle issues concerning the environment and community participation in the tourism sector, and encouraging other relevant Ministries to establish tourism desks at their institutions to liaise with the MOT. The newly formed GTA will be represented at District level and many new officers will be recruited. However it is recommended that staff numbers should be kept to a manageable size.

The 2013-2027 Plan must be legally adopted and sent to Cabinet and Parliament for approval. A Master Plan Permanent Coordination Task Force will be set up to ensure that the plan is implemented. This will be an independent unit reporting to the Minister and to the Chairman of the GTA Tourism Board who will also represent the private sector.

Although Act 817 makes provision for a Public Private Partnership Forum to meet at regular intervals, until now these meetings have been sporadic. It is recommended that these are organised every three months as prescribed in the Act bringing together tourism stakeholders but also representatives from other sectors that impact on tourism and that joint initiatives are agreed and acted upon. Private sector associations must be strengthened and the support of traditional rulers for tourism development in their areas must be garnered.

It is recommended that a new Inter-Ministerial Committee be formed to replace the ineffective current Committee bringing together the same Ministries as well as including the National Development Planning Commission. The Committee should be chaired by the Vice-President who will also call the meetings to ensure that Directors and above attend.

Policy and regulatory framework: A tourism policy was formulated in 2006 with stakeholders in the sector but never presented for ratification to the Parliament. The policy document needs to be redrafted and updated in a more concise paper, which Parliamentarians would be more likely to absorb, accept and ratify.

There is poor understanding of the tourism sector by other government institutions in Ghana, which is affecting tourism's credibility as a productive sector generating income and jobs and benefiting other sectors of the economy. An educational campaign aimed at the Presidency, the Cabinet, the Economic Advisory Council, the Budget Division of the Ministry of Finance and Economic Planning and the Parliamentary Committees on both Finance and Tourism must be carried out, supported by an international conference on the impact of tourism on the economy of selected countries. Invitations to attend should be extended to all senior personnel at Ministries in Ghana (Chief Directors and above), important personalities and stakeholders in the country but also in the region, and to the Press Corp, both nationally and internationally to generate TV and newspaper coverage, explaining the uniqueness, economic power and how Ghana can develop international competitiveness based on a visitor economy.

Wording in the Tourism Act 817, 2011 is in places confusing and could be open to misinterpretation; for instance, the functions of the GTA are not comprehensively spelt out. These issues should be addressed and the Act reworded or amended in an addendum.

The private sector must be involved in regulating and monitoring their industry rather than having rules imposed on them. For instance it could play an active role in the running of the classification system as the example of South Africa.

The Tourism Act 817 empowers the GTA to collect a levy from tourism enterprises amounting to 1% on goods and services consumed by tourists. However, the system to collect this revenue has not been agreed yet in terms of logistics and cost effectiveness. It is recommended that the 1% levy is collected from tourism enterprises that are above a certain size or a certain turnover and that a formula is agreed for the application of the Tourism Development Fund to the relevant activities to progress the sector.

The visa regime in effect in Ghana is cumbersome and expensive. It is proposed that a study to analyse the impact of the visa regime on the number of international tourist arrivals is carried out, presented at the tourism conference recommended above and a media campaign launched to publicise the results.

Human Resource Development: Some education and training for both the public and private sector workforce of the tourism industry has been undertaken since the development of the 1996-2010 Plan but these were not been done in an effective and systematic manner. There is thus, a huge gap between both the quality and quantity of human resource requirements of the tourism industry.

An analysis of the human resource situation in the tourism industry shows the following:

- Absence of a clear national policy framework on training and development for the public, private as well as the large informal sectors of the industry.
- Poor quality of data on human resource development and employment
- Limited linkage of Information Technology with tourism human resource development
- Low public awareness of tourism employment opportunities
- No structured staff training policy at MOT and its agencies
- Lack of professional, managerial, technical skills at MOT and its agencies
- Limited good quality hospitality and tourism training institutions
- Lack of national standards and certification of hospitality and tourism programmes

To resolve the above challenges facing the development of human resource of the tourism industry in Ghana, the following recommendations have been made:

- Develop a national policy on tourism human resource development
- Improve public awareness on careers opportunities in tourism
- Conduct training needs assessment on tourism human capital
- Establish a tourism human resource research unit
- Build capacity of Human resource at MOT, HOTCATT, GTDC and GTA
- Build capacity of Human resource among trade associations of GHATOF
- Improve quality assurance system for tourism education and training programmes
- Build human resource capacity in existing training institutions
- Improve quality, accessibility and affordability of tourism training by establishing the National Hospitality and Tourism Training School
- Develop linkages between academia and tourism industry

Tourism and the environment: Tourism and the environment are inextricably linked and it is important that policies are formulated and actions implemented to ensure that the environment is protected and that tourism contributed to sustainable development. Therefore it is recommended that GTA Officers work with the Environmental Protection Agency (EPA) to ensure that tourism enterprises operate in a sustainable manner, report the impact of their operation and are regularly inspected. They must also work with Metropolitan, Municipal and District Assemblies (MMDA) and the Town and Country Planning Department to ensure that tourist areas are environmentally well maintained and that public waste management services are effective and efficient. In particular they must support the EPA and the MMDAs in stopping illegal mining, cutting of mangroves and sand winning. Efforts should be made to encourage the Corporate Social Responsibility (CSR) of large businesses from other sectors to protect the environment and contribute to the tourism sector.

Ministry staff must liaise with the Ministry of the Environment, Science and Technology (MEST) and with Officers from the Wildlife Division (WD), from Ghana Museum and Monuments Board (GMMB) on establishing environmental protection systems and on protecting cultural heritage assets. They must work with MEST to develop a set of indicators that will measure environmental impacts at tourism sites. A visitor management system at each attraction and cultural heritage site that attracts large flows of tourists at certain times must be put in place.

Community involvement in the tourism sector and socio-cultural considerations: Community participation in the tourism sector and community-based tourism initiatives are quite well developed and many long-term projects are established in Ghana. Marketing is a major hindrance to promote community initiatives as communities rarely have the funds, knowledge and reach to be effective. GREET, an NGO established to monitor, accredit and promote initiatives around Ghana institution, markets some 20 community-projects around the country and advises on new initiatives to eventually accredit them. GREET was promised support from the government which has only partially been extended. To ensure that this invaluable service continues it is recommended that GREET is absorbed into the GTA as an independent unit so that it has permanent Government support to continue its work.

Communities should be represented in tourism development decisions that impact on their areas and should be assisted to participate in the sector. They must be included in all decision-making processes and in development initiatives. It is recommended that Destination Management Organisations (DMO) are set up in Ghana's tourism zones based on the model of those already established in the coastal strip of Ghana's Western region and around the Mole National Park. These will bring together the private sector in the local area, various public sector institutions, civil society and local communities. A mechanism must be adopted to finance the operation of the DMO. Community projects, particularly those that involve women working in the industry, the youth and vulnerable groups must be supported and business partnerships between the private sector and local communities developed and encouraged.

General recommendations: Signage should contribute to the tourist experience by easing access and providing useful information. This requires Government to formulate a tourism signage policy to develop a system based on international designs, general content and guidelines on standard symbols to be used around the country. The MOT must have a policy that will set guidelines for tourist signage and symbols to direct all organisations and businesses wanting to erect signage relating to attractions or tourism businesses.

It is important to showcase the magnificent views that are in every Region and District in Ghana. Viewpoints will be prepared to encourage tourists to stop and admire spectacular views on their travels around Ghana

The establishment of campsites especially at locations where accommodation is limited would provide the opportunity to develop new tourism products in Ghana suitable for adventure tourists, both international and domestic.

The Master Plan document presents the blueprint to improve and develop tourism in Ghana over the next 15 years, building on the base provided by the 1996-2010 Plan. It concludes with a five-year action plan as a road map to achieve the strategic objectives for the first five years of the plan and kick-start the process.

Acronyms

ACID	Amansuri Conservation and Integrated Development
AFDB	African Development Bank
AICD	Africa Infrastructure Country Diagnostic
B&B	Bed and Breakfast
BADEA	Arab Bank for Economic Development in Africa
BOG	Bank of Ghana
BRIC	"Brazil, Russia, India, China"
CBD	China Development Bank
CBT	Community-based Tourism
CBTE	Community-Based Tourism Enterprise
COAST	Collaborative Actions for Sustainable Tourism
COSPE	Cooperazione per lo Sviluppo dei Paesi Emergenti
COTVET	Council for Technical and Vocational Education and Training
CRAG	Car Rentals Association of Ghana
CSR	Corporate Social Responsibility
CT	Cultural Tourism
CWSA	Community Water and Sanitation Agency
DINKS	Double Income No Kids market segment
DMA	Destination Management Area
DMO	Destination Management Organisation
DMT	Destination Management Team
ECG	Electricity Company of Ghana
ECOWAS	Economic Community of West African States
EIA	Environmental Impact Assessment
EMP	Environmental Management Plan
EWN	Empowering Women of Nepal
ETC	European Travel Commission
Fam tour or trips	Familiarisation tour or trip
FC	Forestry Commission
FCG (GWD)	Forestry Commission of Ghana (Ghana Wildlife Division)
FIT	Free Independent Traveller
Fitur	Feria Internacional de Turismo en España; International Tourism Fair in Spain
FX	Foreign Exchange
GACL	Ghana Airports Company Limited
GARFORB	Ghana Forex Bureau Association
GATTA	Ghana Association of Travel and Tour Agents
GCI	Global Competitiveness Index
GDOL	Ghana Department of Labour
GDP	Gross Domestic Product
GEF	Global Environment Facility
GETfund	Ghana Education Trust Fund
GHA	Ghana Hotel Association
GHABOA	Ghana Bar Operators Association
GHATOF	Ghana Tourism Federation
GHCT	Ghana Heritage Conservation Trust
GIA	Ghana International Airlines
GIMPA	Ghana Institute of Management and Public Administration
GIPC	Ghana Investment Promotion Council

GIS	Ghana Immigration Service
GIT	Group Inclusive Travel(ler)
GIZ	German development agency
GLSS	Ghana Living Standards Survey
GMA	Ghana Maritime Authority
GMMB	Ghana Museums and Monuments Board
GNPC	Ghana National Petroleum Corporation
GOG	Government of Ghana
GRA	Ghana Revenue Authority
GRDA	The Ghana Railway Development Authority
GREET	Ghana Rural Ecotourism and Travel Office
GRIDCo	Ghana Grid Company Ltd
GSGDA	Ghana Shared Growth and Development Agenda
GSS	Ghana Statistical Service
GTA	Ghana Tourism Authority
GTB	Ghana Tourist Board
GTCA	Ghana Traditional Caterers Association
GTDC	Ghana Tourism Development Corporation
GWC	Ghana West Coast
GWCL	Ghana Water Company Limited
GWS	Ghana Wildlife Society
HOTCATT	Hotel, Catering and Tourism Training Institute
HND	Higher National Diploma
HRD	Human Resource Development
HRDM	Human Resource Development and Management
I-IP	Inter-Institutional Platform
IATA	International Air Transport Association
IFC	International Finance Corporation
IIED	International Institute for Environment and Development
ITDP	Integrated Tourism Development Programme
JMA	Joint Marketing Agreement
KIA	Kotoka International Airport
LI	Legislative Instruments
MDGs	Millennium Development Goals
MEST	Ministry of the Environment, Science and Technology
MICE	Meetings, Incentives, Conferencing and Exhibitions
MMDA	Metropolitan, Municipal and District Assemblies
MNRT	Ministry of Natural Resources & Tourism (in Tanzania)
MOE	Ministry of Education
MOF	Ministry of Finance
MOL	Ministry of Labour
MORH	Ministry of Roads and Highways
MOT	Ministry of Tourism
MOTr	Ministry of Transport
MOU	Memorandum of Understanding
MSME	Micro, Small and Medium-sized Enterprise
NAB	National Accreditation Board
NACOBTA	Namibia Community Based Tourism Association
NADBOA	National Drinking Bars Operators Association
NCRC	Nature Conservation Research Centre
NCTE	National Council for Tertiary Education
NDPC	National Development Planning Commission
NED	Northern Electricity Department

NEPAD	New Partnership for Africa's Development
NGO	Non-Governmental Organisation
NITS	National Interconnected Transmission System
NLA	National Lottery Authority
NP	National Park
NTOCSB	National Tourism Occupational Classification and Standards Board
PAYE	Pay as you earn
PEA	Preliminary Environmental Assessment
PNDC	People's National Democratic Congress
PPP	Public Private Partnership
RC	Ricerca e Cooperazione
RCC	Regional Coordinating Council
SADA	Savannah Accelerated Growth Development Agency
SEA	Strategic Environmental Assessment
SIT	Special Interest Tourist
SME	Small and Medium-sized Enterprise
SNV	Dutch Development Agency
ST-EP	Sustainable Tourism Eliminating Poverty
STC	State Transport Company
STS	System of Tourism Statistics
SWOT	Strengths, Weaknesses, Opportunities and Threats
TAP	Tourism Area Partnerships
TCPD	Town and Country Planning Department
TGCSA	Tourism Grading Council of South Africa
THETA	Tourism, Hospitality and Entertainment Training Authority
TICO	Takoradi International Power Company
TORGAG	Tour Guides Association of Ghana
TOT	Training of Trainers
TOUGHA	Tour Operators Union of Ghana
TSA	Tourism Satellite Account
TSMTDP	Tourism Sector Medium Term Development Plan
TSTSAC	Tourism Statistics and Tourism Satellite Account Committee
TTB	Tanzania Tourist Board
TTCI	Travel and Tourism Competitive Index
TTDC	Town Tourism Development Committee
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNIDO	United Nations Industrial Development Organisation
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
USD	US Dollars
USP	Unique Selling Point
VAT	Value Added Tax
VFR	Visiting Friends and Relatives
VLTC	Volta Lake Transport Company
VRA	Volta River Authority
WD	Wildlife Division
WDI	World Development Indicators
WTM	World Travel Market

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The National Tourism Development Plan

2013 - 2027

Chapter 1: Background to the Study

While not considered a mainstream economic activity in Ghana's Shared Growth and Development Agenda (GSGDA) 2010-2013 - the Government of Ghana's medium-term policy framework - tourism is nonetheless becoming recognised as an increasingly important sector that generates employment and reduces poverty. Accordingly, a Tourism Act was promulgated in 2011 to support the development of the industry and to assure the quality of services that it provides. In 2012, the Government of Ghana (GOG) commissioned the United Nations World Tourism Organisation (UNWTO) to update the National Tourism Development Plan (1996-2010) and to formulate a new strategy to guide the sector over the next few years. The Government of Ghana, United Nations Development Programme (UNDP) and the United Nations Economic Commission for Africa (UNECA) supported and funded the study.

1.1 Geography, topography and climate in Ghana

Located on the Gulf of Guinea in West Africa, Ghana is a tropical country just North of the equator with a population of 22.8 million people growing at an annual rate of 2.4 per cent. With an area of 238,540 square km, Ghana is a medium-sized country compared to its West African neighbours. Its lies on the Atlantic and has a 540km coastline. The Volta Lake in the East of the country is one of the world's largest artificial body of water and occupies approximately five per cent of the country. Ghana's central location in West Africa is advantageous as a trade hub and gateway for other West African countries and accessible to international and regional tourists (see Figure 1, the map of Ghana).

Ghana is predominantly flat and low lying with most of the country at an altitude of less than 150 metres. The highest peak is Mount Afadjato (885m), located East of the Volta Basin. The coastal plains extend through the Southern, Central and Eastern parts of the coastal area and include Accra and several of the country's major towns such as Takoradi and Sekondi in Western Region and Cape Coast in Central Region. The forest-dissected plateau occupies the South Western part of the country. The savannah high plains in the Northwest gently roll at an average height of between 180 and 300 metres.

The large Volta River Basin, comprising mostly sandstone, occupies the East Central part of the country. All the major rivers flow into the ocean and the only area of internal drainage is that of Lake Bosumtwi in South Central Ghana, into which streams flow from the surrounding highlands. The Volta River system, by far the longest and largest river in the country, drains nearly three-quarters of the country's land area. It offers potential for lake and river related tourism.

Ghana is blessed with kilometres of pristine beaches. The coasts of the Central and Western Region in particular are popular with many resorts. There are strong currents and undertow in certain area, which make its dangerous for water sports while other locations are safe for swimming.

Ghana's climate is influenced by two air masses - the continental air mass (known as the Northeast trade winds or the harmattan wind) and the tropical maritime air mass (Southwest monsoons). The continental air mass originates in the heart of the Sahara Desert and is always dry. There are two wet seasons each year In the South, from April to July and from September to November. The North experiences one rainy season from May to September followed by a long dry season. As Ghana is close to the equator, the average monthly temperature rarely falls below 25 degrees.

Figure 1: The map of Ghana

Source: GOG, UNDP, UNECA, UNWTO

1.2 Vegetation and wildlife in Ghana

Rain forests and moist deciduous forests are mostly found in the Southwest of the country. Much of Central and Northern Ghana is covered by wooded savannah, which is green during the rainy season but becomes parched and brown after the rains. Scrubland and grassland are mostly found in the drier coastal areas where human activity is less intense. Mangrove forests grow around coastal lagoons although these are being depleted by cutting and harvesting for commercial uses and by local communities who use the wood for firewood and to smoke fish.

The NGO Conservation International reports that there are 222 species of mammals, 128 species of reptiles and 38 species of amphibians in Ghana. National parks and reserves are habitats for mammals, both large and small, including elephants, lions, leopards, hippopotamus, spotted hyenas, civet cats, bongos, buffalos, warthogs, river hogs, waterbucks, bushbucks, kob, duikers, oribis, aardvarks, genets, hartebeests, roan antelopes, pangolin, porcupine, chimpanzees, baboons, black and white colobus, mona, the rare Diana monkey and other species of primates. Ghana is home to both forest and savannah elephants, several species of inland and coastal crocodiles and various types of snakes including pythons.

1.3 Tourism in the context of Ghana's development

This section considers tourism's position in the Government's development plans and strategies and its progress and contribution since the National Tourism Development Plan (1996-2010).

1.3.1 Government's vision on tourism

The **National Tourism Development Plan (1996-2010)** was prepared within the framework of the first *Coordinated Programme of Economic and Social Development Policies* under the title, *Ghana: Vision 2020,* aimed at making Ghana a middle-income country in 25 years.

The First **Medium-Term National Development Plan (1997-2000)** focused on the following priority areas; human development, economic growth, rural development, urban development, infrastructure development, and an enabling environment.

Seven years into Vision 2020, the **Ghana Poverty Reduction Strategy (2003-2005)** was launched to redefine the strategic intervention of Vision 2020. It was followed by the **Growth and Poverty Reduction Strategy (2006-2009)** to guide the national development agenda. In these two national development strategies, tourism was considered an important sector to help reduce poverty especially in districts with actual and potential tourism resources and to serve as an economic growth pole in depressed districts with tourism potentials.

The current policy framework, the **Ghana Shared Growth and Development Agenda (GSGDA, 2010-2013)**, has a vision to develop the tourism industry for jobs and revenue generation.

The specific strategies identified to achieve the policy objectives are as follows:

i. **Diversify and expand the tourism industry for revenue generation:**
   - By marketing Ghana as a competitive tourist destination, new high-value options in the leisure market, culture, heritage and ecotourism products will be developed,

while enhancing the attractiveness of the existing products;

- Tourism services and standards will be enhanced through inspection, licensing and classification of formal and informal tourism establishments; and human resource capacity of skilled and unskilled personnel in the hospitality industry will be enhanced;
- Programmes will also be designed to promote the development of more high value accommodation and condominiums by the private investors; attract health care entrepreneurs to establish medical facilities offering clinical and surgical services to promote wellness facilities (i.e. natural spas) in order to ensure long-term stay of convalescents at selected tourism sites. These are expected to improve and strengthen the infrastructure base of the industry;
- To improve the overall financing of the sector, interventions will be designed to reduce the credit constraint facing operators in the sector including granting 'export' status to hotels so that tourism sub-sector players can also enjoy the benefits and concessions enjoyed by other exports;
- The overall legal and institutional framework to support the industry and the development of national parks and other high-rated natural attractions will be enhanced and strengthened.

ii. Promote domestic tourism to foster national cohesion as well as redistribution of income:

- To promote domestic tourism and foster national cohesion, the specific strategies identified for implementation include, vigorous promotion of domestic tourism to encourage Ghanaians to appreciate and preserve their national heritage and create wealth in the communities; and develop domestic tourism infrastructure including tourist receptive centres.

iii. Promote sustainable and responsible tourism in such a way to preserve historical, cultural and natural heritage:

- The specific strategies identified under this policy objective include developing sustainable ecotourism, culture and historical sites;
- Ensure the elimination of incidence of sex abuse and the spread of sexually transmitted diseases via the tourism industry.

iv. Development of other allied sectors of the tourism industry:

- Promote the creative industry for economic development to forge a holistic and integrated approach towards enhancing the economic viability of tourism. These include cultural sites, visual arts, traditional cultural expressions, performing arts, music, audiovisuals, media, design and other creative services.

1.3.2 Status of the industry as related to the overall development plans of the country

In the past the tourism industry has lacked the supporting policies and infrastructure development enjoyed by other high-growth sectors such as cocoa, mining, oil and gas to boost its development.

Despite being the fourth largest foreign currency earner after the major primary export sectors of gold and cocoa and remittances due to taxes and other revenue mostly from visitors through private sector and institutional investments, there is little direct public investment in the industry. The following reasons are commonly cited:

- Overwhelming national deficit financing for education, healthcare, housing and transportation infrastructure
- The perception that tourism earnings accruing to government do not require direct government investment for increase and sustenance because the industry is a self-sustaining private sector-led activity

1.3.3 Tourism's positioning within the national development context

The exploitation of crude oil and natural gas, which commenced in the last quarter of 2010, will significantly change Ghana's trajectory of economic growth and the level of per capita income.

This will statistically elevate Ghana to a middle-income country status without the concomitant structural changes that are typically characteristic of middle-income countries. Therefore, in spite of the anticipated increase in per capita income, the structure of the Ghanaian economy will fundamentally remain unchanged in the medium-term. However, this assumption is highly ambitious since the oil and gas industry is exploitative and not resilient to global prices and demand, as is the case of tourism. It is in this context that some gas and oil producing countries such as Dubai and Qatar have re-strategised and shifted their development plans to be more tourism-focused.

Revenue from cocoa and gold, oil and gas are projected to be the main drivers of economic growth; Ghana's growth will therefore continue to be driven by natural resources. According to the African Economic Outlook[1] oil production and mining activities lead industrial sector growth at 36.2 per cent followed by the services sector (5.8 %) and the agricultural sector (5.2 %).

The objective of the GSGDA is to ensure that new growth poles are reinforced to accelerate poverty reduction without becoming enclaves. The proceeds from oil and gas will therefore be deployed to catalyse the growth potentials of the other sectors, especially agriculture, human development, water and sanitation, and infrastructure particularly transportation, housing, ICT and energy to enhance Ghana's socio-economic development.

As it stands the tourism and hospitality industry's role in the national development is largely a hospitality receptive industry for international business visitors and domestic business travellers. Domestic and international leisure visitors are not significant contributors to Ghana's economic growth.

However, tourism can benefit from investments derived from the proceeds brought by the main economic drivers in major road, rail, water and air transport as well as utilities, ICT and social infrastructure. If convincing development schemes are prepared and justified the sector can also become a catalyst for substantial economic activity. These endowments make Ghana one of the few countries to be in a position to leverage natural resources as well as tourism to achieve a quantum leap in economic growth and development.

[1] African Economic Outlook: http://www.africaneconomicoutlook.org/en/countries/west-africa/ghana/ accessed on November 16, 2012

1.4 Achievements since the formulation of the National Tourism Development Plan in 1996

The National Tourism Development (1996-2010) was prepared with the full involvement and enthusiastic participation of Ghana's public and private sectors in all regions of the country. Donors and international and domestic private investors were eager to participate in what was seen to be an industry that would overtake the less sustainable timber and mining industries.

The Plan was well received and engendered actions that have developed and progressed the sector over the years. It formed the basis for subsequent Medium Term Development Plans. The 2006-2009 Tourism Sector Medium Term Development Plan (TSMTDP) for instance aimed to make Ghana a competitive and quality tourism destination.

An aggressive marketing agenda was pursued including organising familiarisation tours (fam tour) for international tour operators and Ghana hosted the African Travel Association twice (1999 and 2006). The country also participated in tourism fairs in Milan, Tokyo, Madrid and Durban in South Africa in addition to the main fairs in London and Berlin. These activities produced good results until the events of September 11th 2001 slowed tourism around the world. Business tourism recovered as Ghana's economy grew subject to periodic global economic downturns. Destinations in Ghana such Accra have become knows for conference tourism although today the country is unable to host more than 1,000 people and four or more major conferences concurrently make it less competitive in the sub-regional and international Meetings, Incentives, Conferencing and Exhibitions (MICE) market. The growth of leisure travel however has been relatively slow since 2001.

Some of the product development recommended in the Plan was carried out with varying degrees of success. Between 2001 and 2004, donor-sponsored land use plans were formulated by the tourism public sector in collaboration with district assemblies for selected attraction sites located in rural areas including the Oda 'Big Tree Forest', Wli Waterfalls, Kintampo Waterfalls, Paga Crocodile Sanctuary, Tetteh Quarshie Cocoa Farm, Assin Manso Slave River. Unfortunately, there has not been follow through actions to implement the plans.

An estimated 30 per cent of the recommended receptive facilities to support Ghana's historic and cultural heritage, beach and nature tourism products were developed within the timeframe (14 sites). The objective was to expand leisure tourism to redistribute income and encourage participation of small and micro enterprises in the industry. However, the results achieved have not been encouraging in several cases due to several challenges including a lack of tourism as a priority sector in the portfolios of the Metropolitan, Municipal and District Assemblies and inadequate funding of the tourism sector, as described in Section 2.6.5 in this report.

The 1996-2010 National Plan increased awareness of tourism as an economic activity around the country, which initiated various educational initiatives including several universities degree and masters award programmes, in particular at University of Cape Coast, Kwame Nkrumah University of Science and Technology, University of Ghana, and University of Development Studies Methodist University in Accra. In 2009, a Hospitality Training Academy established at the Ghana Institute of Management and Public Administration (GIMPA) merged with the Hotel, Catering and Tourism Training Institute (HOTCATT) to improve on hospitality training for industry operators. However, as described in Section 2.7.1 this merger was short-lived and HOTCATT has reverted to the Ministry of Tourism.

As the sector has grown since 1996, new jobs have been created in the formal and informal sectors, especially for women, the youth and the unemployed. Section 2.9 provides an overview of the development of Tourism and Hospitality Human Resources in Ghana.

An awareness campaign focusing on the socio-cultural impact of tourism was organised in 1996. The campaign included an awareness drive of cultural adulteration and dangers of sex tourism and sexually transmitted diseases, especially HIV/AIDS in collaboration with the Ghana Aids Commission and the Private Sector.

Ghana is regarded as having improved in hospitality standards for hotels, restaurant, tour and travel operations and played a lead role in harmonising the hotel and restaurant licensing standards in West Africa as part of the Revised Treaty of the Economic Community of West African States (ECOWAS). The Ghana Tourist Board (GTB now replaced by the GTA – the Ghana Tourism Authority) over the years has teamed up with private sector producers of cleaning detergents to train hotel staff in cleaning and hygiene standards and has improved the quality standards of facilities.

Since the launch of the Plan, hotel investment has been buoyant. Hotels in Accra and other major cities show annual average occupancy rates of 75%, which is indicative of the vibrant demand and commercial profitability of hotels, particularly those offering international standards. It is inevitable that there will be increased competition for existing hotels from new entrant hotels such as the 5-star Airport City Hotel (Marriott), and eventually the Kempinski Hotel in downtown Accra. This should also lead to a demand-driven increase in visitor arrivals especially for conference and leisure tourism because of the room availability and market visibility of Ghana in generating countries, as all these hotels will be independently marketing the destination.

The number of airlines flying to Ghana has double since 1996 when there were 15 international airlines with scheduled flights to Kotoka International Airport (KIA), and four cargo airlines. In 2012, 30 passenger airlines and six cargo airlines fly to Accra and several more are applying for routes including Royal Jordanian, Qatar Airways, Air Namibia, China Eastern Airlines and Air Canada. Passenger numbers have increased from 352,000 in 1996 to over 1.73 million in 2011. Domestic air services have increased from 2 routes to four routes. Accra is still the only international air gateway although there are plans to expand Tamale for international flights and to build a new international airport at Takoradi. Whilst these developments are mostly driven by demand from the business sector, greater air access opportunities will also benefit the development of leisure tourism.

However, despite these developments and the progress made by the sector since the 1996 Plan, there remain many challenges to address.

1.5 The need for an updated tourism development plan

The recommendations prescribed in the National Tourism Development Plan (1996-2010) were only partially implemented. This can be generally attributed to:

- lack of political commitment at the highest level of Government
- changes of Government and frequent changes of leadership at tourism institutions
- low levels of funding allocated to development and marketing
- unreliable data on the performance and contribution of the sector
- lack of understanding about the benefits that can be derived from a vibrant tourism

sector
- consequently, low status of the sector compared to more visible and better supported industries such as oil and gas, mining, cocoa, and agriculture
- low capacity to carry out the activities set in the Plan

Despite these impediments, the sector has been growing above world and regional average driven by the strong overall performance of Ghana's economy, the enabling business environment generating important demand for business travel and the country's reputation for political stability and safety in a volatile region.

With renewed interest in the sector and the conclusion of the National Tourism Development Plan (1996-2010) the time is apposite to examine progress made and take stock, identify barriers that have been (and are still) hampering the development of the sector, propose a strategic direction to embark on and define activities to achieve the national goals expressed in the Ghana Shared Growth and Development Agenda (GSGDA) as well as those of the United Nations Millennium Development Goals (MDGs). Hence, the Government of Ghana is keen on promoting sustainable growth to convert tourism into leading sector in the national economy.

1.6 The nature of the report

The National Tourism Development Plan - 1996-2010 (henceforth referred to as the 1996-2010 Plan in this report) was conducted over a two-year period and provided a comprehensive overview of the situation at the time. It was one of the components of the larger Integrated Tourism Development Programme (ITDP). This programme included the formulation of regional tourism plans for each of the ten regions of the country, prefeasibility studies for selected tourism projects, a marketing strategy and promotion plan as well as a tourism awareness programme. Legal aspects, licensing requirements and classification systems were reviewed and recommendations made for improvement, technical and financial assistance for major improvement of the Hotel, Catering and Tourism Training Centre (HOTCATT) was proposed and a tourism management information system to be managed by the Ministry of Tourism was created. A series of detailed specialist reports were prepared and, to engage the process, a five-year Tourism Development Action Programme supported by a Tourism Development Financial Plan was formulated.

The National Tourism Development Plan - 2013-2027 (from this point referred to as the 2013-2027 Plan) is designed to update the 1996-2010 Plan and to provide a new direction that will guide and develop the sector over the next 15 years. The emphasis of this plan is placed on identifying opportunities to enhance and progress tourism in Ghana as well as the obstacles and constraints that are hampering its development while building on the recommendations made in the 1996-2010 Plan. The main goal of the 2013-2027 Plan is to ensure that tourism in Ghana achieves its full potential in a sustainable and responsible manner and that it contributes to the country's GDP, reduces poverty, ensures that its operation is not detrimental to the environment and the culture and traditions of the Ghanaians and attracts a wide range of markets.

The report is divided into several chapters:

- **Chapter 2** presents a situational analysis that describes the current state of the sector from different angles
- **Chapter 3** defines development objectives to be pursued to progress the sector
- **Chapter 4** describes the existing tourism structure plan for Ghana and the proposed

physical development strategy over the plan period
- **Chapter 5** provides strategic recommendations to achieve the development objectives and to address the obstacles that are impeding the sector
- **Chapter 6** lists the actions that must be carried in the first five years of the plan

Much additional information is presented in Appendices, which accompany the main body of the text

1.7 Methodology employed in the study

The study was carried out over a two-month period [8th September to 8th November, 2012] and involved a team of international and national experts (see Appendix 1.2 for a list of experts on the project). Expertise in the following areas was provided over the course of the project as shown in Table 1:

Table 1: Areas covered in the 2013-2027 Plan

• Statistics	• Product development
• Economic impact	• Institutional building
• Planning and development	• Policy and regulatory review
• Marketing	• Human resource development
• Branding	• Community involvement
• Infrastructure and services	• Environmental issues

Source: GOG, UNDP, UNECA, UNWTO

To collect the information required and to involve stakeholders in the process, several techniques were employed during the study. These included:

- Review of documents and studies
- Field trips around the country
- Attendance at events
- A large workshop with 40 stakeholders
- Several branding workshops (3), with up to 8 key participants
- Interviews with key informants and tourism stakeholders (a list of organisations consulted is included in Appendix 1.3)
- Interviews with visitors at tourist sites
- A questionnaire with tour operators from different source markets, 19 surveys were returned
- Reports to the Steering Committee (the members of the Steering Committee are listed in Appendix 1.1)

It was important that the plan formulation was participatory and all efforts were made to elicit views from important stakeholders, including them in discussions and ensuring that their opinions were reflected in the report. To this end a stakeholder workshop was held on October 3rd, 2012 at the Travel Xpress International Hotel in Accra, which was attended by more than 40 important people from public and private sector organisations and from civil society. Five groups were formed to brainstorm on the following topics:

- Statistics/economics/investments
- Planning and infrastructure
- Marketing

- Human resources
- Environmental, social and cultural impacts

Each group presented its findings, which were commented on and discussed by the participants as a whole. The information captured was very valuable and the participation of the stakeholders ensured their engagement with the project.

A Steering Committee comprising representatives of the Ministry of Tourism, the UNDP and the UNWTO were informed throughout the process, met at each stage (inception, mid-project review and final review) and reports were regularly submitted. The findings and recommendations of the study were presented and discussed at a validation workshop attended by 60 stakeholders.

Chapter 2: Situation Analysis

The situation analysis presented in this chapter is an evaluation of the current tourism context and the external environment impacting on tourism. It provides the base data on which the formulation of the strategy for the plan will be anchored and it highlights areas that need to be addressed in the strategy. It provides the basis for formulating the strategy presented in this report.

2.1 Structure and performance of the tourism sector in Ghana

Section 2.1 provides an introductory presentation in statistical and descriptive terms of the current structure and performance of the tourism sector in Ghana as reported by the Ministry of Tourism (MOT), Ghana Tourism Authority (GTA) and other official sources of data, supplemented as appropriate, by other national and international sources where comparative analyses with other sectors of the national economy and with relevant international experience are considered important.

It must be noted however that certain of the data made officially available from the GTA, particularly the highly significant indicators of sector performance such as international arrivals and international receipts, are currently (and over recent years) only recorded as GTA (earlier recorded as Ghana Tourist Board [GTB]) *estimates* on account of data collection problems (see Section 2.3 The Tourism Statistical System for more details) and must therefore be interpreted with caution. Official data published by the Ghana Immigration Service (GIS) since 2005 for example, have recorded mostly lower international arrival figures than those reported by GTA and while both sets of data show growth in the number of visitors arriving in Ghana, the rate of that growth is significantly higher with the GTA data and from 2009 significantly higher also in absolute numerical terms.

2.1.1 Tourism establishments

The following tables present the most recently published data available from the GTA on the physical structure of the tourism sector in Ghana. This structure comprises the licensed number of tourism establishments or businesses operating as hotels, travel agents, tour operators, car rental companies, restaurants and nightclubs within Ghana.

A tourism business operating in each of the categories represented in these tables must be licensed to do so by the GTA and this licence must be renewed annually. It is the Licensing and Registration department of the GTA, which administers this process and thereby collects updated details upon the number, size and style of businesses required to be annually licensed.

Table 2: Licenced hotels, rooms and beds 2005-2010

YEARS	2005	2006	2007	2008	2009	2010*
No. of Hotels	**1,345**	**1,427**	**1,432**	**1,595**	**1,775**	**1,797**
% Growth		6.1	0.4	11.4	11.3	1.2
No. of Rooms	**18,752**	**22,835**	**20,788**	**24,410**	**26,047**	**28,058**
%Growth		21.8	-9.0	17.4	6.7	7.7
No. of Beds	**23,924**	**27,839**	**26,063**	**29,645**	**31,664**	**34,288**
%Growth		16.4	-6.4	13.7	6.8	8.3

*Provisional

Source: GTA

Table 3: Licensed star hotels, rooms and beds 2005-2010

YEARS	2005	2006	2007	2008	2009	2010*
No. of Hotels	**504**	**342**	**312**	**379**	**372**	**417**
% Growth		-32.1	-8.8	21.5	-1.8	12.1
No. of Rooms	**8,791**	**8,050**	**7,738**	**9,407**	**10,075**	**11,098**
%Growth		-8.4	-3.9	21.6	7.1	10.2
No. of Beds	**11,469**	**10,555**	**10,355**	**11,921**	**12,102**	**13,544**
%Growth		-8.0	-1.9	15.1	1.5	11.9

*Provisional

Source: GTA

Table 4: Licensed star rated hotels 2005-2010

YEARS	2005	2006	2007	2008	2009	2010*
5-STAR	**1**	**1**	**1**	**1**	**1**	**1**
% Growth		0.0	0.0	0.0	0.0	0.0
4-STAR	**4**	**4**	**4**	**4**	**5**	**5**
%Growth		0.0	0.0	0.0	25.0	0.0
3-STAR	**28**	**30**	**20**	**26**	**17**	**23**
%Growth		7.1	-33.3	30.0	-34.6	35.3
2-STAR	**137**	**138**	**133**	**149**	**165**	**163**
% Growth		0.7	-3.6	12.0	10.7	-1.2
1-STAR	**154**	**169**	**154**	**188**	**184**	**225**
& Growth		9.7	-8.9	22.1	-2.1	22.3
TOTAL NO. of STAR HOTELS	**324**	**342**	**312**	**368**	**372**	**417**

*Provisional

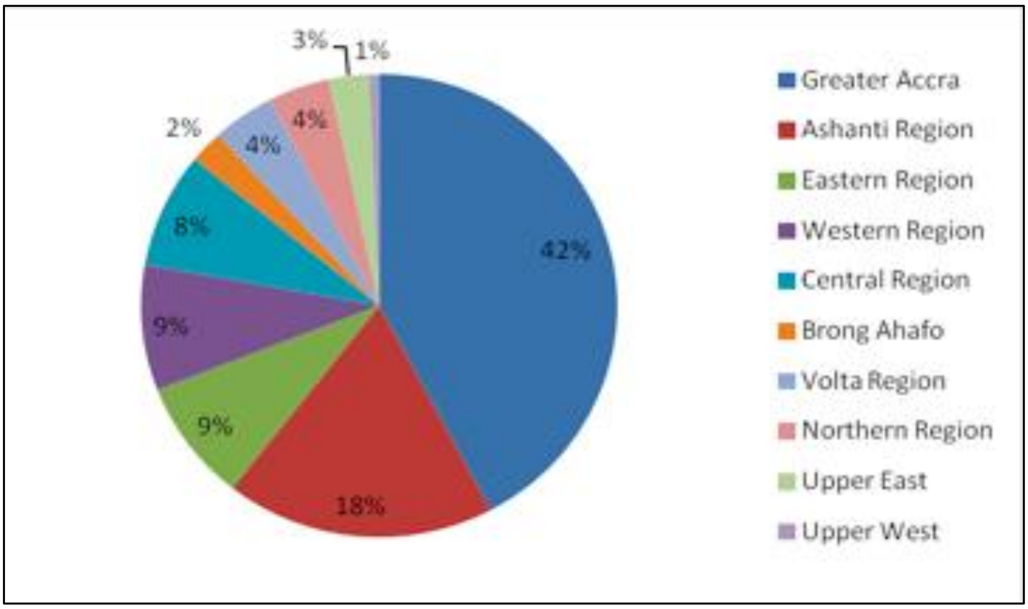
Source: GTA

The first three tables above present data upon the number, size and style of the licensed hotel sector demonstrating the expansion that has taken place in the number of hotels, rooms and beds available across Ghana in the period 2005 to 2010 in terms of both licensed hotels and licensed star hotels.

The number of licensed star hotels is lower than the total for all licensed hotels because a larger number of licensed hotels fall outside of the star rating categories and are characterised instead as 'budget' hotels or similar. In 2005 however, there is a discrepancy between the absolute numbers of licensed star rated hotels shown in Tables 3 and 4 where the detailed breakdown in Table 4 is considered to be accurate and the figure in Table 3 considered to be the result of an error in allocation between star rated hotels and 'budget' hotels.

Growth in the supply of star rated hotels has, not surprisingly, been strongest in both absolute and percentage terms in the 1 and 2 Star categories where entry qualifications are less demanding, the cost of entry is lower and the market is largest. With the opening of the 5 Star Movenpick Hotel during 2011, the 2013 opening of the 5 Star Kempinski Hotel and further upscale international hotels due soon from Marriot and Radisson (all in Accra), it is clear that strong growth will shortly be seen in the statistics for the 5 and 4 Star categories. Greater Accra dominates the supply of star rated hotels in Ghana particularly at the 2 to 5 Star category levels but the quality of regional hotel supply is improving as Cape Coast, Takoradi, West Coast, and Kumasi have seen the opening of new star rated hotels.

Figure 2: Distribution of accommodation establishments in Ghana in 2010



Source: GTA

The distribution presented in Figure 2 and Table 5 reflects the distribution of tourists, whether business, VFR or leisure related, in the country. Most of the star rated hotels are concentrated in Greater Accra, Ashanti, Eastern, Western and Central Regions as shown in the following table. In addition to the star rated hotels, there are 137 guesthouses, 1176 budget and 67 supplementary accommodation establishments around the country.

Table 5: Distribution of star rated hotes and hotel rooms in Ghana in 2010

Region	5-star		4-star		3-star		2-star		1-star		Total	
	No.	Rms	No.	Rms	No.	Rms	No.	Rms	No.	Rms	No.	Rms
Greater Accra	1	104	4	590	9	802	67	1.917	92	1,580	173	4,993
Ashanti Region			1	166	4	109	49	1.319	44	882	98	2476
Eastern Region					3	187	10	299	18	376	31	862
Western Region					3	137	16	373	32	563	51	1,073
Central Region					3	150	9	268	14	213	26	631
Brong Ahafo					1	92			5	124	6	216
Volta Region							5	347	12	222	17	569
Northern Region							7	153	6	93	13	246
Upper East									2	29	2	29
Upper West												
Total	**1**	**104**	**5**	**756**	**23**	**1,477**	**163**	**4,676**	**225**	**4,082**	**417**	**11,095**

Source: GTA (provisional estimates)

The hotel occupancy rates, especially in star rated hotels, have been relatively high during the past decade. The GTA statistics show roughly 80 per cent occupancy rates on average for 4-star rated hotels. This was supported by the hotel representatives in Greater Accra. There is, however, a tendency that the occupancy rates drop during the weekends and during the European holiday months (July-August and mid December – mid January).

Table 6: Licensed travel agents and tour operators 2005-2010

CATEGORY	2005	2006	2007	2008	2009	2010*
Travel and Tour Operators						
With IATA Licence	37	48	49	40	44	45
Without IATA Licence	174	186	143	140	132	119
SUBTOTAL	**211**	**234**	**192**	**180**	**176**	**164**
Travel Agents						
(a) With IATA Licence	35	25	19	19	19	13
(b) Without IATA Licence	61	43	40	35	24	26
SUBTOTAL	**96**	**68**	**59**	**54**	**43**	**39**
Tour Operators	42	48	43	50	50	43
TOTAL	**349**	**350**	**294**	**284**	**269**	**246**
per cent Growth		0.3	-16.0	-3.4	-5.3	-8.6

*Provisional

Source: GTA

The figures for licensed travel agents and tour operators in Table 6, show an absolute decline in the number of businesses in this sector over the period 2005 to 2010, however, it is also clear that the greatest decline has been in the category of travel and tour operators without an IATA licence which suggests that the sector itself is becoming more professional and thus a stronger and more effective component of the tourism sector. Based on stakeholder interviews in October 2012, the majority of incoming tourism business is handled by roughly ten travel agencies and tour operators.

The licensed car rental sector grew by nearly 50 per cent in 2008 as shown in Table 7 and may presently be characterised as experiencing a period of consolidation after such strong expansion.

Table 7: Licensed car rental companies 2005-2010

CATEGORY	2005	2006	2007	2008	2009	2010*
Grade A	7	6	7	10	10	6
Grade B	34	42	36	55	62	66
Grade C	12	12	14	19	18	19
TOTAL	**53**	**60**	**57**	**84**	**90**	**91**
% Growth		13.2	-5.0	47.4	7.1	1.1

*Provisional

Source: GTA

Table 8: Licensed restaurants by category and night clubs 2005-2010

YEARS	2005	2006	2007	2008	2009	2010*
GRADE 1	59	66	59	60	55	46
GRADE 2	109	97	117	125	127	153
GRADE 3	153	153	152	156	137	141
FAST FOOD	33					
NITE CLUB	12	14	23	20	25	19
TOTAL	**366**	**330**	**351**	**361**	**344**	**359**
% Growth		-9.8	6.4	2.8	-4.7	4.4

*Provisional

Source: GTA

The licensed restaurants and night clubs sector presented in Table 8 has remained essentially the same absolute size over the period 2005 to 2010 although the intervening period has seen alternative decline and growth in equal measure from year to year. Fast food restaurants, which were represented in 2005 have failed to reappear in the data since that date and were they to be removed from the total of licensed restaurants for 2005 would result in an overall stronger picture of growth in the period 2005 to 2010.

The country's location, stability, and rising role as a regional business hub have seen an increase in the number of flight connections internationally and domestically. Airline capacity has grown rapidly, from 24 carriers servicing Ghana in June 2011 to 34 by July 2012, with expectations that six more will be added by the end of 2012. Domestic flights have also received a boost as internal traffic rose 60 per cent in 2011 following an increase in the number of airlines connecting Ghana's five airports and the offering of more affordable flights. (Ghana Tourism Overview 2012)

Thanks to the increase in international connections, high occupancy rates and tourism market structure, the growth prospects for tourism are considered strong. The World Travel & Tourism Council expects the sector's total GDP contribution to rise by 4.3 per cent in 2012 and at an annual rate of 5.4 per cent over the following 10 years.

2.1.2 Tourism competitiveness

Comparative international competitiveness in tourism is measured, ranked and monitored by the World Economic Forum's Travel and Tourism Competitiveness Index (TTCI), the most recent edition of which was published in 2011. This Index comprises quantitative data from publicly available sources, international organisations, travel and tourism institutions and experts together with the results from a survey carried out amongst top business leaders and chief executive officers from each of the economies covered by the research.

The TTCI aims to measure the factors and policies that make it attractive to develop the travel and tourism sector in different countries and it is based upon three broad categories of variables that facilitate or drive travel and tourism competitiveness. These categories are summarised into the three sub-indexes as follows:

1) The travel and tourism regulatory framework sub-index
2) The travel and tourism business environment and infrastructure sub-index
3) The travel and tourism human, cultural and natural resources sub-index

These three sub-indexes are in turn comprised of 14 features of travel and tourism competitiveness, which are also sub-divisible into a number of individual variables.

According to the 2011 TTCI report, Ghana ranks 108th overall out of the 139 countries that comprise the Competitiveness Index, which represents a slight improvement upon its 110th placement in the previous (2009) edition of the report. Ghana is ranked in 10th place among Sub-Saharan nations whilst in comparison with other West African countries only The Gambia (6th in Sub-Saharan Africa and 92nd overall) and Senegal (9th in Sub-Saharan Africa and 104th overall) are ranked as more competitive.

Ghana ranks relatively poorly (115th out of 139 nations) under the sub-index for Tourism Regulatory Framework where the poor quality and timeliness of travel and tourism data are highlighted together with poor government prioritisation of the travel and tourism industry, difficult visa arrangements and continuing weaknesses across the national health and hygiene sector.

Ghana ranks a little better under the remaining two sub-indexes, Tourism Business Environment and Infrastructure and Human, Cultural and Natural Resources where the placing's are 105th and 104th respectively, supported by the number of World Heritage sites and protected areas and the positive attitudes of the Ghanaian people towards foreign visitors but undermined by inadequacies in air, road and rail infrastructure provision, air ticket taxes and airport charges.

2.2 The tourism economy in Ghana

Development economists in recent years have strongly advocated for the need for considering the tourism sector as a key engine of economic growth for both resource-rich and poor economies. The importance was recognised in Ghana as far back as 1970 when government set up a committee to identify and assess the tourist resource potentials of the country. Various studies were conducted thereafter to ascertain ways of formulating and effectively implementing plans that would confer maximum benefits on the country. Due to the unstable political environment and unfavourable economic conditions, various plans/programmes were left on the drawing board. However, a concerted effort was made to formulate and launch a 15-year ***National Tourism Development Plan for Ghana, 1996-2010***. The primary objective in this sub-section is to review the status of tourism before and during the implementation period and draw insights that will be useful for effective policy formulation and implementation, especially in the drawing of the next 15-year perspective Development Plan.

The economic role of tourism: The tourism sector is a major source of foreign exchange generation for economic growth and development. Its unique feature of being a labour-intensive activity makes it a source of employment generation, foreign exchange earnings, contribution to GDP, conservation of biodiversity and poverty reduction in the face of rapid population growth and the accompanying rise in poverty.

2.2.1 Performance before and during the 1996-2010 Plan implementation period

At the time of formulating and launching the 1996-2010 Plan, the following constraints on the sector were identified and some remedial policy measures were recommended:

- Limited budgetary allocation to the tourism sector
- Limited accessibility to financial markets to mobilise investment funds for developing tourist facilities and services
- Limited confidence by domestic and international investors in making the necessary investments in tourism development
- Complicated taxation requirements and procedures on tourism enterprises
- Piracy of skilled labour from existing tourism enterprises by new enterprises
- Lack of better cooperation within the tourism industry
- Limited promotion of tourism internally and internationally
- Lack/absence of tourism development fund
- Low level of public and industry education on government policies for tourism development
- Very limited statistical data on tourism to enable detailed analysis of the sector

a. Analytical framework

The analytical framework follows a trend analysis of key tourism impact indicators, which form the basis of comparison. Due to data limitations and/or non-reliability, period averages are used wherever necessary to minimise deviations from trend in order to obtain reasonable outcomes in the analysis. Tables 9 and 10 provide the trends in two crucial indicators — tourism arrivals and receipts – in a before-and-during analytical framework to demonstrate the importance of the sector in the economy of Ghana.

Since 1985 when tourism was categorised as a priority sector in the Ghana Investment Code (PNDC Law 116, 1985) there had been a steady rise of tourism arrivals and receipts. Tourist arrivals rose from 92,000 in 1985 to 146,000 by 1990, with accompanying rise in receipts of USD 20million and USD 81 million respectively (GTA).

By 1994, arrival figures stood at an absolute figure of over 271,000. This figure grew by 5.4 per cent in 1995, a year prior to the launching of the 1996-2010 Plan. The positive trend in growth continued from the initial year of the plan, 1996, through to the first phase. The Second and Third Phases however experienced some negative growth rates in some years including 2002, 2004, 2009 with 2005 recording the lowest growth rate, -33% due to factors including recession in the originating counties, especially the USA and the UK, instability of the cedi and, presumably, election/political instability concerns. These uncertainties, coupled with data limitations and non-reliability, substantially explain the large statistical deviations of the terminal year, (2010) projected arrivals from the realised figure of 746,527. However, other years recorded positive but oscillating outcomes due to recovery in the originating economies and post election stability in the cedi and general recovery of the Ghanaian economy.

The period average outcomes indicate that the third Phase (2006-2010) of the 1996-2010 Plan was the most successful. The sector recorded an average growth rate of 14.1 per cent, compared to the 10 and -0.1 per cent for the first (1996-2000) and second (2001-2005) phases respectively. A closer look at policy interventions and initiatives of private sector actors are required in order to obtain a complete picture. Such policy interventions may include government assistance to the private sector through subsidies and the facilitation of financial transactions between tourism investors and financial institutions.

Table 9: Tourism arrivals, receipts and elasticity

Year	Arrivals	% Change	Receipts ($ Mil)	% Change	Receipts Elasticity (σ)
1985	85,000		20.0		
1986	92,000	8.2	27.0	35.0	4.3
1987	103,000	12.0	37.0	37.0	3.1
1988	114,000	10.7	55.0	48.6	4.6
1989	125,000	9.6	72.0	30.9	3.2
1990	146,000	16.8	81.0	12.5	0.7
1991	173,000	18.5	118.0	45.7	2.5
1992	213,000	23.1	167.0	41.5	1.8
1993	257,000	20.7	206.0	23.4	1.1
1994	271,310	5.6	227.6	10.5	1.9
1995	286,000	5.4	233.2	2.5	0.5
1996	304,860	6.6	248.8	6.7	1.0
1997	325,438	6.7	265.6	6.7	1.0
1998	347,952	6.9	284.0	6.9	1.0
1999	372,653	7.1	304.1	7.1	1.0
2000	456,275	22.4	289.5	-4.8	-0.2
2001	609,822	33.7	335.9	16.0	0.5

2002	584,329	-4.2	389.7	16.0	-3.8
2003	688,970	17.9	452.1	16.0	0.9
2004	582,108	-15.5	487.0	7.7	-0.5
2005	392,454	-32.6	627.1	28.8	-0.9
2006	508,199	29.5	740.1	18.0	0.6
2007	580,895	14.3	879.0	18.8	1.3
2008	672,434	15.8	1052.3	19.7	1.3
2009	667,275	-0.8	1211.4	15.1	-19.7
2010	746,527	11.9	1406.3	16.1	1.4
2011	827,501	10.8	1634.3	16.2	1.5
Period Average					
1986-1994		13.9		31.7	2.6
1990-1994		16.9		26.7	1.6
1996-2010		8.0		13.0	-1.0
1996-2000		10.0		4.5	0.8
2001-2005		-0.1		16.9	-0.8
2006-2010		14.1		17.5	1.2

Sources: Ghana Tourism Board (GTA), Ghana Immigration Service (GIS) and Consultant's computations.

2.2.2 Tourist arrivals and the benefits stream

At the macro-economic level, tourism stands as the third, (excluding remittances from Ghanaians abroad), largest foreign exchange earner in the Ghanaian economy after Gold and Cocoa.

Traditionally, tourist arrivals constitute the primary determinant of benefits derived from the tourism sector. In other words, the demand-supply relationships are such that the higher the demand for Ghana's tourism products as depicted by higher arrivals the higher the economic benefits that the economy derives. For tourism to become a major engine of growth, efforts are required for the establishment of a dynamic equilibrium between the supply of and demand for tourism. The necessary, though not sufficient, condition is the enhancement of both the supply and value chains of the tourism sector as would be analysed later in a sub-section under chapter 5.

The statistical trends in Table 9 show steady absolute increases in arrivals, with little down trends observed in few years, accompanied by steady absolute increases in receipts over the period under review, except in 2001. However, the percentage increases in arrivals were generally accompanied by more than proportionate increases in receipts, resulting in elasticities greater than 1 for the Phase 3-period further implying overall net benefit from tourism earning in this phase. This attests to the importance and success of the last phase of the previous plan. The story was however different in the First and Second phases. The intermittent trend in the arrivals was accompanied by less than proportionate increase in receipts giving rise to less than unity elasticities. More specifically, the following benefits can be identified:

a. Impact of tourism on the Gross Domestic Product

According to the United World Tourism Organization (UNWTO), a key criterion of assessing the impact of tourism on an economy is to determine its contribution to the gross domestic product through the generation of receipts by the sector. Receipts here are viewed as the foreign exchange earnings from the sector. The over-riding importance of foreign exchange in development financing in Ghana makes tourism's share in GDP very crucial. Because of leakages that arise from tourism activities such as importation of inputs, services and profit repatriation, it is realistic for policy makers to go beyond gross foreign exchange earnings by deriving the net foreign exchange earnings through the leakage coefficient of 0.28 for 1995 to 1999 and 0.20 for 2000 to 2010 as illustrated in the 1996-2010 Plan.

Beside the annual positive outcomes in the receipts and its contributions to GDP as illustrated in Table 10, the period averages provide the statistical mechanism for inter-temporal comparison and policy decision making thereof.

Table 10: Impact of tourism on the Gross Domestic Product (GDP)

Year	GDP current market prices (Million GHc) (A)	GDP current market prices (Million US $) (B)	Growth Rate (%) (C)	Receipts (R) Mil $ (D)	Gross contribution. To GDP (R % of GDP) E=(D/B)*100	Net Foreign Exchange (FX) (F)	Net (FX) contribution to GDP (%) G=(F/B)*100
1995	775.17	6,457.44	4.1	233.20	3.6	167.90	2.6
1996	1,133.87	6,925.53	4.6	248.80	3.6	179.14	2.6
1997	1,411.34	6,884.02	4.2	265.59	3.9	191.22	2.8
1998	1,729.60	7,474.02	4.7	283.96	3.8	204.45	2.7
1999	2,057.98	7,709.81	4.4	304.12	3.9	218.97	2.8
2000	2,715.25	4,977.49	3.7	386.00	7.8	308.80	6.2
2001	3,807.07	5,309.16	4.0	447.83	8.4	358.26	6.7
2002	4,886.20	6,159.57	4.5	519.57	8.4	415.66	6.7
2003	6,615.77	7,624.16	5.2	602.80	7.9	482.24	6.3
2004	7,988.79	8,871.87	5.6	649.37	7.3	519.50	5.9
2005	9,726.08	10,720.35	5.9	836.09	7.8	668.87	6.2
2006	18,705.02	20,388.32	6.4	986.80	4.8	789.44	3.9
2007	23,154.53	24,632.48	6.5	1172.00	4.8	937.60	3.8
2008	30,178.63	28,528.92	8.4	1403.10	4.9	1122.48	3.9

2009	36,598.56	25,978.54	4.0	1615.20	6.2	1292.16	5.0
2010	46,042.62	32,174.58	8.0	1875.00	5.8	1500.00	4.7
2011	59,264.00	39,199.66	14.4	2179.00	5.6	1743.20	4.4
Period Averages							
1986-1994			4.6	109.2	1.8	78.63	1.3
1990-1994			4.3	158.6	2.45	114.19	1.8
1996-2010			5.3	777.08	6.0	612.59	4.7
1996-2000			4.3	297.69	4.6	220.52	3.4
2001-2005			5.0	611.13	8.0	488.91	6.4
2006-2010			6.7	1,410.42	5.3	1,128.34	4.2

Sources: Ghana Statistical Service, World Bank and Consultant's calculations

The period averages of outcomes again reinforce the position that the Plan has been beneficial to the development of tourism which, in turn, has helped in economic growth and development process of the country. The average values of both the absolute and growth rates are greater than the preceding period values. The Second Phase recorded the highest contribution to GDP followed by the Third Phase. This is expected as the last phase (2006-2010) coincided with the Rebasing of the economy hence Receipts shares are based on higher rebased-GDP values. In reality, the performance of the last phase is not bad at all and thus confirms a positive dynamic planning mechanism.

b. Key determinants of tourism's contribution to GDP

It is relevant to note that traditionally factors influencing tourism's contribution to GDP include special endowments and/or attributes that will entice the tourist to visit and spend. Labour force with right skills and, more importantly both public and private investment in tourism induce higher tourist arrivals, expenditure, and hence higher contribution to GDP.

a. Employment generation

Highly labour intensive, the sector provides vital employment for people with a wide range of skills, as well as the unskilled, – Roe et al. (2004) in their paper *tourism and the Poor: Analysing and Interpreting Tourism Statistics from a Poverty Perspective.* From field study findings, the employment multiplier was estimated at 3.5, implying that any direct employment undertaken, will result in 2.5 indirect and induced employment created. In terms of income generation, estimates can only be based on survey and labour market trends. It must be emphasised that the figures in 11 are likely to be approximations, with plus or minus (+or -) 10 per cent deviations.

Table 11: Employment generation and elasticity values (2000-2011)

Year	Direct	Indirect	Total	% Change	Arrivals	% Change	Employ. Elasticity
2000	20,388	50,971	71,359		456,275		
2001	23,043	57,609	80,652	13.0	609,822	33.7	0.4
2002	26,073	65,184	91,257	13.1	584,329	-4.2	-3.1
2003	28,884	72,211	101,095	10.8	688,970	17.9	0.6
2004	36,549	91,372	127,921	26.5	582,108	-15.5	-1.7
2005	39,107	97,769	136,876	7.0	392,454	-32.6	-0.2
2006	41,454	103,634	145,088	6.0	508,199	29.5	0.2
2007	46,635	116,589	163,224	12.5	580,895	14.3	0.9
2008	53,105	132,761	185,866	13.9	672,434	15.8	0.9
2009	59,549	148,871	208,420	12.1	667,275	-0.8	-15.8
2010	65,895	164,737	230,632	10.7	746,527	11.9	0.9
Period Average							
2001-2010			147,103	12.6		7.0	-0.1
2001-2005			76,829	14.1		-0.1	-0.8
2006-2010			186,646	11.0		14.1	0.7

Source: Ghana Tourism Board (GTA) and Consultant's Calculations

Employment Elasticity is defined here as a percentage change in employment resulting from a percentage change in Arrivals. The last column in 11 shows that generally. The last period's average elasticity of below one (1) implies that, the industry generates employment proportionately less than the proportionate change in arrivals.

Policy Implication: As a service and labour-intensive industry, the *raw empirical interpretation* is that, the industry's employment levels do not always match the optimal levels of employment to enhance quality service. By implication, the industry is turning to more use of capital than previously, presumably because of higher wages and labour market agitations. Government should therefore find ways to make the industry more labour absorbing through the creation of skilled manpower for the industry.

b. Poverty alleviation/reduction

The nature of the hotel industry is such that demand for professionals, semi-professionals, skilled and semi-skilled has direct correlations with 'star status' of the establishment. In other words the lower 'starred' hotels, restaurants, chop bars, drinking bars, shops and food vending, among others, have higher absorptive capacity for employing the poor[2]. Because of the cultural underpinnings of income expenditures, even the fortunate employees in high-starred establishments (the 5-, 4- and 3-starred) are obligated by the 'shared poverty syndrome' in development that requires empathy with the poor. Thus the substantial proportions of the induced part of the income multiplier will find its way into the pockets of poor relatives and friends. Rural-based craft artisans and their dependants are another group of beneficiaries of tourism development. In sum, identifying and promoting the tourism potentials of deprived areas constitute one of the most effective ways of fighting poverty in

[2] Following the MDGs, the absolute poor can be defined as those earning less than $1 a day

such areas.

c. Fiscal impact of tourism

In tourism resource-rich countries in Africa, such as Kenya and South Africa where data availability is an integral part of the sector's development strategy, there is clear evidence of the enormous fiscal contribution to national development.

Tourism in Ghana, however, is yet to make a significant fiscal impact on the economy through tax revenue generation as depicted by the revenue generated from the hotels and restaurants in 12 below. In general, taxes applicable to tourism consist of the following:

- airport taxes, fees, and levies;
- hotel, restaurant, tour and travel agency, car rental and nightclub registration/ licensing fees;
- corporate and personal income taxes;
- import duties on imported items used in tourism;
- taxes on local inputs to the tourism sector;
- entertainment tax (tourist expenditure taxes in hotels, restaurants, etc.);
- entry fees to tourist attractions – castles, forts, parks and reserves, cultural centres; and
- municipal, district taxes including property taxes and copyright fees.

Due to data limitations and unreliability, the table has been confined to the hotel and restaurant sub-sectors. Data from other sources of tax revenues could not be accessed because of bureaucratic bottlenecks. Admittedly, the contents are inadequate to significantly reflect the fiscal impact of tourism on the economy taking cognisance of the list of tax handles listed above. However, in absolute terms, it can be observed that the annual totals are steadily increasing. As tourism activities become more and more sustainable, both the absolute and growth trends are prospectively going to attain much higher levels.

Table 12: Tax revenue from the hotel and restaurant industries by tax type (Gh¢)

Year	P.A.Y.E (A)	Corporate (B)	Self Employment (C)	Total D=A+B+C	Growth in D (%)	Government Rev (E)	% Share of Total Rev. (F)
2005	1,537,415.05	2,844,493.51	53,674.57	4,435,583.13		2,303,959,466	0.193
2006	3,331,234.94	5,513,438.04	388,523.79	9,233,196.78	108.16	2,542,797,986	0.363
2007	3,643,559.66	9,213,346.54	703,693.76	13,560,599.96	46.87	3,627,577,730	0.374
2008	5,225,147.09	6,422,885.52	1,084,092.08	12,732,124.69	-6.11	4,736,275,487	0.269
2009	6,464,643.34	6,282,652.24	935,927.60	13,683,223.18	7.47	5,642,796,309	0.242
2010	6,839,482.20	5,708,462.09	1,503,147.89	14,051,092.18	2.69	7,685,134,390	0.183
2011	8,348,913.47	8,529,680.41	1,710,538.85	18,589,132.73	32.30		
Period Avg.							
2005-2011	5,055,770.82	6,359,279.76	911,371.22	2,326,421.81	27.34	3,791,220,195	0.23
2006-2010	5,100,813.45	6,628,156.89	923,077.02	12,652,047.36	31.82	4,846,916,380	0.29

Source: Ghana Revenue Authority (GRA)

2.2.3 Conclusion

Despite the fact that the tourism sector was and currently remains under-funded and only partially recognised by the highest policy establishments over the years, the various statistical outcomes presented above amply demonstrate that it is on the ascendancy. More importantly, it carries high potentials for becoming a major engine of growth and development in the economy. The achievements under the 15-year 1996-2010 Plan provide the *raison d'etre* for a sustainable planning culture for the sector's development. Statistically, sub-period average outcomes in the third phase of the Plan (2006-2010) provide testimony to progress being made in the sector, despite the general lack of adherence to some of the driving policy recommendations for development. That phase attained the highest results as expected from a progressive 1996-2010 Plan. Against the backdrop of the on-going resource discoveries that produce quick and much-needed short-term investible funds for development, there is the temptation to de-emphasise other sectoral activities, especially in agriculture, which carry greater poverty reduction characteristics. The former, especially oil and gas as cases in point, are exhaustible resources in the long term. An erroneous strategy of this nature will eventually introduce the economy to the proverbial *Dutch Disease.* In sum, the necessary condition for a sustainable tourism development, as can be inferred from the analyses above, is the sector's prioritisation in the national development agenda. The sufficient condition is the implementation of recommendations, public and private sector recognition and support and, most importantly, optimal funding for the rapid development of the industry.

2.3 The tourism statistical system

2.3.1 Background to tourism data collection in Ghana

All the key areas covered by a System of Tourism Statistics (STS) were examined during the fieldwork. These may broadly be summarised as follows:

Types of Tourism
- International Inbound Tourism
- Domestic Tourism
- Outbound Tourism

Types of Tourism Statistics
- Arrival Statistics
- Expenditure Statistics
- Accommodation Statistics
- Tourism Employment Statistics
- Tourist Attraction Statistics
- Visitor Surveys
- Tourism Inventories
- Market Surveys
- Industry Statistics

The collection, compilation, dissemination and publication of tourism statistics in Ghana has been recognised as inadequate for many years and although this problem is not confined to the GTA since a variety of statistics related weaknesses are evident across many Government Ministries and Agencies, a lack of resources and a commitment to tackling this issue has been evident within MOT and GTB (GTA).

A major five-year, multi-donor programme led by the World Bank entitled ‘The Ghana Statistics Development Programme’ began this year and it is designed ‘to strengthen the National Statistical System in the production and dissemination of timely, robust statistics relevant for evidence-based policy making and other uses’. This Programme focuses on the structure, capacity and operations of the Ghana Statistical Service (GSS), the national organisation responsible for the compilation, analysis, dissemination and publication of official statistics but necessarily, it also incorporates an examination of the operational conditions of the many ministerial departments and agencies supplying data to GSS. Unfortunately, it appears that the MOT and GTA are not represented within this Programme.

During the period 2004 to 2008, moves were made to address the shortcomings of the available tourism statistics and a decision was taken to pursue the introduction of the Tourism Satellite Account (TSA), a methodology for measuring the contribution of tourism to Gross Domestic Product (GDP), which can only be developed where a robust system of tourism statistics is in place. Thus a technical Inter-Ministerial Committee or Tourism Statistics and Tourism Satellite Account Committee (TSTSAC) led by the GSS and including the MOT, GTB, Ghana Immigration Service (GIS), Ministry of Finance (MOF) and Bank of Ghana (BOG), was established to evaluate and plan for the strengthening of tourism statistics and the eventual introduction of the TSA.

The TSA should be viewed as a means to understand tourism as an intrinsic part of an economy and to describe it as an activity that has important impacts on other activities and sectors. A TSA based on a robust system of tourism statistics can become a reliable instrument to monitor and to orient public policies on tourism development while serving as a powerful lobbying tool for National Tourism Administrations (NTA's) to advocate the cause of tourism.

However, the development of a TSA is a long and complex process and highly demanding in terms of information. It requires measurements of international and domestic visitors and trips with a degree of accuracy that allows for disaggregation by purpose of visit, means of transport used, forms of accommodation, forms of organisation of the trip, etc. In particular, it calls for measurement of their expenditure by class of products consumed. In addition, it is necessary to identify how industries supply goods and services to visitors, and their cost of production, particularly their use of labour.

Following some initial success with the development of new survey questionnaires and the introduction of an improved entry/exit card for international arrivals, the TSTSAC lost momentum and then a lack of resources from within GSS in particular to implement further surveys, and a failure to find replacement funding for the project from the other member institutions led to the abandonment of this process.

An examination of the current status of tourism statistics collection, analysis, publication and dissemination is presented below.

2.3.2 The Institutions collecting tourism statistics

Tourism statistics are collected either directly or indirectly by several institutions in Ghana, representing data collected on a regular and structured basis and other data collected on an ad hoc or special case basis. The principal institutions that collect such data are listed as follows:

- Ministry of Tourism (MOT)
- Ghana Tourism Authority (GTA)
- Ghana Immigration Service (GIS)
- Ghana Statistical Service (GSS)
- Ghana Museums and Monuments Board (GMMB)
- Forestry Commission of Ghana (FCG)
- Bank of Ghana (BOG)
- Ghana Revenue Authority (GRA)
- Ministry of Trade and Industry

a. Ministry of Tourism

The Mission Statement of the MOT states that 'the Ministry exists to create a conducive and favourable environment for sustainable growth and development of the tourism sector…… through effective and efficient use of appropriate policies, corporate planning programmes and projects and public-private partnerships……'.

The Ministry is thus structured as a policy-making body whose functions are implemented by the GTA, which operates as an agency under the ultimate control of the Ministry. One of the Ministry's functions is described as 'maintaining tourism statistics research and a tourism database' and GTA is directed to implement this activity. Within the structure of the Ministry there exists a department for Research, Statistics and Information whose activities are primarily policy development oriented and it carries out research for this purpose. The GTA conducts research for marketing and planning purposes and to carry out studies when needed.

b. Ghana Tourism Authority

The GTA is the single most authoritative source of tourism data in Ghana as determined under the mandatory framework of the MOT and as more recently set down in the new Tourism Act 817, 2011. Section 3 of the Act, Functions of the Authority, directly describes its requirement under point (m), to 'collect, compile and publish information and statistics in respect of activities regulated under the Act' and under point (d) describes a more general requirement to 'initiate, conduct, promote and encourage studies for growth and development of the tourism industry'.

The origination of the Tourism Act 817, 2011 derives from the transformation of the Ghana Tourist Board (GTB) into the GTA with its new income-generating powers vested in the introduction of the 1% Tourism Levy and the direction of these monies into a new Tourism Fund (see Section 2.8). The content of the Tourism Act therefore necessarily responds to this significant change in powers and functions yet it still, very largely, focuses upon the historic licensing, registration and regulatory functions of the Authority, which is also reflected in the operation and output of the statistics function.

As the authoritative source of data upon the tourism sector the GTA provides figures for international visitor arrivals, international visitor receipts, employment, hotel occupancy, the number of hotels, rooms and beds and a summary of arrivals and revenues associated with 30 tourist sites according to the table for Domestic Tourism on the most recent 'Tourism Statistics Factsheet on Ghana'.

- ***GTA data on international visitor arrivals and visitor receipts are estimates***

However, in reality, GTA only presents its own *estimates* of international visitor arrivals and visitor receipts (it neither conducts the surveys associated with this data nor has any first hand data from other sources from which to work) but it does collect limited first hand data upon hotel occupancy from a narrow sample survey and more substantive data upon the supply of hotels, rooms, beds and employment from annual hotel licensing and registration documentation.

Data are also collected from Travel Agents, Tour Operators, Car Hire companies and Restaurants through the same business licensing and registration system used for the hotel sector. Data upon arrivals and revenues from 30 tourist sites are collected from organisations such as GMMB and FCG.

c. Ghana Immigration Service

The GIS is mandated to regulate and monitor the entry, residence, employment and exit of all foreigners as well as the monitoring of the movement of Ghanaians in and out of the country through its establishment as the specialist Government agency designed to advise upon and ensure the effective implementation of all laws and regulations pertaining to immigration and related issues.

The GIS does not conduct the collection of tourism related data as a primary activity but through its mandate to regulate and monitor the entry and exit of foreigners and Ghanaians, it surveys the movement of visitors and nationals across its national boundaries with the use of an entry and exit card questionnaire which has been designed in historical cooperation with the GTB, to elicit certain data which is of interest and value for tourism purposes.

The GIS issues entry and exit cards to and collects data from all appropriate persons moving across its national frontiers, by air, land and sea and makes certain of this data available publicly.

- ***Lack of collaboration between GTA and GIS in the collection of tourism statistics***

At present (and for some years), there exists a breakdown in communication and cooperation between GIS and GTA which has led to both the non-compilation and analysis of visitor arrivals data held by GIS, for tourism purposes, but equally critically, the non-use by GTA of even the annual visitor arrivals data collected at the border posts by GIS, as the basis for their 'authoritative' published data on annual international arrivals and receipts.

d. Ghana Statistical Service

The GSS has the legal status of an autonomous, independent public service organisation responsible for the compilation, analysis, publication and dissemination of official statistics in Ghana for general and administration purposes including through the conduct of national surveys and censuses and the coordination of national economic and social statistics.

The direct collection of tourism related data has not been a traditional activity of the GSS; such data as have been collected have been sourced indirectly through the conduct of national business surveys, industry sector by sector, including for the hotel and restaurants sector for the production of the National Accounts and GDP. However, in 2006, the GSS included a new module of specific tourism related questions in its Fifth Ghana Living Standards Survey (GLSS 5), which sought data upon the domestic and outbound travel patterns of resident Ghanaians. This survey is conducted approximately every five years.

The internal structure of the GSS includes a division that focuses on the statistical aspects of the service sector of the Ghanaian economy and this has a small team of statisticians that includes coverage of the tourism sector amongst the several specialist service sectors, which they have responsibility for. As far back as 2004, a Tourism Statistics and Tourism Satellite Account Committee (TSTSAC) was set up under the technical direction of this unit in GSS and it included representatives from the MOF, the MOT, the GTB, the GIS and the BOG. This Committee was designed as part of the implementing framework set up to research, evaluate and develop a plan for the eventual introduction of the Tourism Satellite Account (TSA).

The introduction of tourism questions in the 2006 GLSS 5 survey described above was a positive outcome for the TSTAC but the project lost financial support in 2008 and unfortunately was unable to continue.

e. Ghana Museums and Monuments Board

The GMMB is the legal custodian of Ghana's material cultural heritage (movable and immovable) and its mission is to acquire, protect, conserve and document that material culture for posterity for the purposes of research and education of the public. Collection of statistics associated with the opening of museums, monuments and archaeological sites to the public is therefore part of the organisation's remit. Figures are available, for example, for the national museums, forts and castles, identifying visitor numbers and associated revenues and this data are forwarded to GTA.

f. Forestry Commission of Ghana

The FCG is responsible for the regulation of utilisation of forest and wildlife resources, the conservation and management of these resources and the coordination of policies related to them. The Commission implements these responsibilities through five specialist divisions one of which, the Wildlife Division, is directly responsible for the management of all Wildlife-Protected Areas, Sanctuaries, coastal Ramsar sites and zoos and collects statistics associated with visitor arrivals and related revenues to these sites as part of their administration and development of the eco-tourism potential of these locations. This data are forwarded to GTA.

g. Bank of Ghana

The BOG does not collect tourism sector data directly but in the course of its compilation and analysis of the Balance of Payments, one of the principal indicators used to monitor and measure the performance of the economy, the Bank utilises data drawn from the banking sector and GSS on business activity within the service sector of the economy which deals with revenues from and expenditure with persons and business entities outside of Ghana. The service sector is a diverse part of the economy but it does comprise numerous tourism sector businesses including, travel agents, tour operators, car hire operators, hotels, restaurants and certain specialist retailers.
The BOG continually seeks to improve the reliability and accuracy of its data handling and reporting and undertakes ad hoc surveys to strengthen this position. To this end, it is currently planning a survey of the services sector, which would include a requirement to sample businesses within the tourism sector as described above, and it has made clear that assistance from GTA would be welcome, not only with the identification of suitable sample businesses but also with the drafting of the questionnaire to be used.

2.3.3 The principal data collected

a. Arrivals statistics

The collection of arrivals data is controlled by the GIS who issue self-completion entry and exit cards to all appropriate visitors arriving by air, land and sea at 45 land border posts, two sea ports and one international airport. The legal and historic mandate of GIS is concerned with the regulation and monitoring of the ‘entry, residence, employment and exit of foreigners’ and ‘the movement of Ghanaians in and out of the country’ thus traditionally, their statistics have followed a framework determined by this requirement without consideration for the particular interests of the MOT and GTB in these figures.

MOT and GTB has been dependent upon the transfer of data from GIS which has neither been collected nor supplied in accordance with tourism’s particular needs in mind and thus may have been subject to amendment by GTB to remove, for example, arrivals categories such as diplomats, refugees and military personnel who do not conform to the accepted international definition of tourist arrivals.

Prior to 2005, the entry and exit cards contained no questions of a tourism nature but through the establishment and operation of the TSTAC in 2004, discussions between GIS and GTB successfully introduced changes into the format of the cards with the introduction of Purpose of Visit and Length of Stay questions for example. In addition, the cards were redesigned with a detachable section which included the tourist related questions so that GIS and GTB could physically receive their ‘own cards’ and prepare their own statistical analysis therefrom.

Quite clearly, during the operational period of the TSTAC (and possibly also in the years before this committee began) there was constructive dialogue between GIS and GTB, even if the arrivals figures presented by both organisations differed by a couple of percentage points with the GTB figures generally being slightly higher. However, following the abandonment of the TSTAC process during 2008, cooperation between GIS and GTB faltered when a revised entry/exit card, designed between the parties, was issued by GIS without the previously incorporated detachable format. The convenience of the previous arrangement was now lost raising the question of how GTB was to be provided with the data from the tourism questions for its own analysis since GIS would not release their entry/exit cards for GTB analysis.

- ***GTB/GTA statistics and GIS statistics do not agree***

From 2009 to date, the differences between the GIS and GTB/GTA arrivals data have been considerably greater than those seen in the period 2005 to 2008. The GTB figures for 2009 are 20 per cent higher, the figures for 2010 are almost 25 per cent higher and the 2011 figures are a remarkable 30 per cent higher, in comparison with the one to three percentage points' difference in the earlier period. It is increasingly clear therefore that the GTB/GTA figures which are publicly accepted and used as the authoritative version of international tourist arrivals to Ghana are at serious odds with the figures available from GIS, the legal authority which controls and monitors the entry and exit of foreigners to Ghana and produces its own statistics from the first hand data it collects from the entry and exit cards.

It is evident that the GIS figures are based upon their use of the entry/exit card and their physical collection of data from each arrival completing an entry card and it is equally clear from discussions with GTB/GTA, that they are **NOT** preparing their figures from the arrivals data collected by GIS but instead prepare estimates of visitor arrivals based upon projections made from two historic data series of arrivals figures which predate the establishment of their cooperation with GIS in 2004 through the TSTAC. GTB/GTA has had some historical reservations about the accuracy of the arrivals data presented by GIS (in terms of the accuracy of the collection/coding of data from the entry cards, particularly from some of the smaller and more remote border posts and also with the timeliness and compilation of data collection, again from the more remote border posts) but considers that the historic data series from which they develop their projections to possess a level of accuracy they can have confidence in.

Kotoka international airport in Accra has historically been the overwhelmingly dominant point of entry for international arrivals and in 2011 it accounted for 89 per cent of the total. Kotoka and the three next most important border posts (the three principal land border crossing points with neighbouring, Burkina Faso, Cote d'Ivoire and Togo) together account for 99 per cent of international arrivals leaving the numerous other minor crossing points to account for only about 1 per cent of arrivals in 2011. GIS has indicated that these four most important entry points have now been provided with electronic passport scanning equipment but it is understood that this is used for security purposes rather than for data collection and the timeframe for extending this electronic system to capture data is unclear at present.

- ***GTB data based on historic data series projections are 20 to 30 per cent higher than GIS***

In summation therefore, the currently accepted figures for international arrivals and their breakdown by purpose of visit (the latter have remained essentially unchanged in percentage terms since at least 2005) are not a reflection of what would be the usually internationally accepted figures collected by the national immigration service, (the GIS in Ghana), but are in fact simply an estimate and projection made by GTB based upon an historic data series which they consider to be reliable and accurate. The result of this unusual situation is an acceptance as accurate, of arrivals figures from GTB, which over the last few years have been 20 per cent to 30 per cent higher, on an annual basis, than the GIS figures and such a major discrepancy can no longer be accepted without question.

International arrivals data are one of the cornerstones of tourism statistics and a fundamental indicator of tourism sector performance together with receipts data from these same arrivals, which are often developed in direct correlation with and from the arrivals numbers. Thus any doubt expressed in the validity of the arrivals data automatically casts doubt upon the validity of the receipts data and has implications for policy statements and judgements made upon acceptance of such figures.

It is quite clear however that the current situation where two versions of a primary statistical figure exist and are not even close in absolute terms, yet one of the figures is regarded as authoritative over the other without apparent justification, is simply untenable. A breakdown in cooperation and perhaps trust between GIS and GTB/GTA over some years, has led to doubt, uncertainty and lack of confidence in this fundamental statistical indicator and this unacceptable condition must be resolved as a priority. Communication and cooperation between the two organisations must be re-established through a suitable forum and a thorough review of the data collection procedures at GIS undertaken

b. Expenditure statistics

GTB/GTA presents international tourist receipts data that are given the same authority as their presentation of international arrivals figures and they are calculated by simply multiplying the visitor arrivals figures by an annual average visitor expenditure figure. This annual visitor expenditure figure is believed to be drawn from the results of an annual Survey of International Air Travellers conducted at Kotoka International Airport with non-Ghanaian visitors of 18 years and above.

➢ ***Tourism expenditure data are also estimates***

According to the tourist expenditure data presented, the most recent annual average expenditure figure shown is USD 2,010 and it dates back to 2008 since when all the annual receipts figures have been calculated using this average number. Thus just as the international arrivals data are in fact *estimates* based on projections from earlier data series so the international tourist receipts are also *estimates,* but from a dual perspective, firstly because the average annual visitor expenditure figure has been an estimate since 2008 and secondly because the international arrivals figures used are themselves also estimates.

According to GTA, the problem with the use of an out-of-date annual average expenditure figure is directly related to the fact that they have been unable to conduct their Survey at Kotoka International Airport in recent years because the airport authorities have stopped issuing the necessary passes which allow survey team members to gain access to the airside departure lounges where the questionnaire was administered.

GTA has expressed the view that they are hopeful of re-starting this important questionnaire by the end of this year and this would indeed be a major step towards improving the collection of accurate and up-to-date data. The International Air Travellers Survey is more than simply an expenditure survey, it comprises some 16 questions in all, covering the age, gender, nationality and residence of the visitor but more importantly asks questions about what their main purpose of visit to Ghana was, whether the trip was part of a wider visit to neighbouring countries, how many nights they spent in Ghana, what range of overnight accommodation they used, with whom they travelled to Ghana, which places they visited in Ghana, how they rated their visit experience under twelve different categories and how they rated the overall quality of their visit to Ghana.

This is a survey that must be reintroduced as soon as possible and the re-establishment of constructive dialogue between GTA and the Ghana Airports Company to facilitate this process must be regarded as a priority.

c. Accommodation statistics

GTA collects a variety of accommodation related statistics, which are triggered directly from the legal authority, which the organisation has over business licensing and registration of the tourism sector and from the regulatory oversight function of the sector, which it also controls. In practice, this means that GTA is required to collect data upon both the supply and demand sides of the operational tourism sector and this is a considerable nation-wide task to be undertaken with the limited capacity and financial resources historically available and the reality is that the performance of this task is difficult and the results are uneven. It is hoped that additional funds will be allocated from the new Tourism Fund to support these important activities.

i. Licensing and registration data

From the perspective of business licensing and registration, the type of data collected is directly associated with the ownership structure and the physical characteristics of the business, including the type of accommodation, the number of rooms and beds and the mix of other guest facilities and their capacity. This data is collected from the licensing and registration forms the businesses must complete in first instance and from the required annual license renewal forms which provide evidence of any updating of the available facilities. Collection of the forms is undertaken by the ten GTA regional offices on a continual basis since licensing and registration of businesses takes place throughout the year and renewal falls on the same date the following year rather than all businesses being licensed and renewed on the same day of the year. The requirement for licensing and renewal provides the legal basis for business trading and the vast majority of businesses operating in the sector across the country are thus captured through this process and therefore the scope of the data generated can be considered to be similarly comprehensive.

The data collection from a supply side perspective may be characterised as comprehensive but the data collected from the demand side, on occupancy, length of stay, purpose of visit, nationality and other guest characteristics is extremely weak by comparison. Each licensed accommodation establishment is required to buy books of registration forms from GTA with which to register each of its guests. This form contains 18 questions covering the points described above. The guest completes the form on arrival and the establishment completes six further questions at the foot of the form covering the room number allocated, the number of persons per room, the room rate charged, the time of arrival and date of departure and whether the guest was a chance arrival. The carbonated nature of the form allows the establishment to keep a copy and a second copy is forwarded to the GTA on a monthly basis – the establishment collects all the forms completed during a month and is then due to submit them within several days of the end of that month. Submission means submission to the regional offices of the GTA, except in Greater Accra, where submission tends to be directly with the Head Office of GTA.

In reality, submission rates are extremely low across the country with Greater Accra performing better than any other region. Submissions are essentially complete from the three to five star hotel operations, become limited from the one and two star hotels and essentially absent from the budget hotel sector. Greater Accra's better submissions performance is therefore due to the fact that most of the three to five star hotels in the country are based in this region.

Response rates are low in part because the establishment must make the effort to return the forms to the regional office of GTA and this may represent a physical difficulty, depending upon the location, but certainly may be otherwise be considered an inconvenience. The regional GTA office for its part may be expected to chase-up the missing forms from the establishments and ultimately offer to collect them directly; however, such a task is evidently beyond the capacity and resources – manpower, time, vehicles, cash to buy fuel for the vehicles etc. – of these offices and the data remains largely uncollected.

With an overall response rate likely to lie between 12 per cent and 15 per cent of the total of national star rated hotels and these largely representing the few higher quality hotels in Greater Accra, and with the absence of any response from the other licensed accommodation providers which represent around 75 per cent of national licensed accommodation supply, it is clear that the data sample available is too small and too focused in regional and quality terms to have any value. GTA does codify and store the data from the forms it does receive but it is not analysed or used.

ii. Accommodation occupancy data

The GTA has been operating a long-running National Hotel Occupancy Survey, which is a simple questionnaire that asks for the number of available rooms, the number of rooms sold and the resultant occupancy calculation, per month. This questionnaire should be returned on a quarterly basis and cumulatively would therefore provide the annual occupancy figure for the hotel.

This questionnaire is once again administered from the GTA regional offices like the registration data described above and is either delivered to the regional office or is pro-actively collected by that office when an opportunity arises. A similar pattern of poor response rate across the country is experienced by this survey with the highest number of returned questionnaires being sent back from the highest quality hotels and the majority of these being returned from hotels in Greater Accra. Despite the fact that this is a simple form requiring only the recording of two pieces of data and the completion of one calculation it appears to remain a challenge for many small hoteliers.

Regional workshops have been held for smaller hoteliers to improve their capacity to complete these forms but the problem persists and the capacity of the regional offices to follow-up non-returning hotels and to assist them with completion is again constrained by their own capacity and resource limitations.

The poor response rate to this survey across the country places limitations on the value of its results except of course when it comes to reporting upon the annual average room occupancy rates for the higher quality hotels whose returns make up the majority of the data responses. The resultant figures are essentially a reflection of occupancy levels in Greater Accra for the three to five star hotel sectors and possibly also to a large extent of the one and two star hotel sectors so in terms of reflecting national room occupancy patterns, the survey is flawed except at the top end of the market where it does record a high response rate from the top rated hotels and it records accuracy at the top end of the market because the operators understand how to complete the questionnaires.

Weaknesses in capacity and resources by regional GTA offices to collect data

The difficulties which GTA has in administering and collecting data from these two main data collection instruments points to serious weaknesses in the capacity and resources available at a regional level and may also be reflective of wider resource constraints and commitments which GTA Headquarters is prepared to make available to the statistics function within the organisation as well as its determination to secure an effective regional structure. The current question marks which therefore hang over the capacity and effectiveness of the regional offices, certainly in their ability to operate and manage statistical surveys and to work closely with the private sector tourism establishments does not bode well for the forthcoming introduction of the new Tourism Levy which will require the introduction of a completely new (monthly?) statistical questionnaire requiring the disclosure of sensitive operational and financial data, the careful evaluation of important calculations and the regular collection of tax revenues.

It is not at all clear how this major new finance raising power is to be implemented, monitored and controlled, what sort of questionnaire will be used and what range of questions will be asked but what is abundantly clear is that without adequate thought, planning and resources being deployed to create a robust and effective system, a successful outcome is not a foregone conclusion. An opportunity presented by the introduction of this new revenue and data collection exercise is the chance to examine whether it might also be used to incorporate data requirements being made through the existing questionnaires discussed in this section and thus to reduce the burden of questionnaire filling upon the tourism establishments and their collection by the regional offices.

2.4 Tourism infrastructure and services

2.4.1 Infrastructure background

According to the Africa Infrastructure Country Diagnostic (AICD) Report 2010, produced by the World Bank, it will cost an estimated USD 1.5bn per year to meet Ghana's infrastructure needs over the next decade. Finance is being sought from a range of sources including: budget revenues; a USD 3bn loan facility from the China Development Bank (CBD) that will be used for rail and port upgrades; and the creation of an improved environment for public-private partnerships. The AICD report ranked the country 110th out of 139 countries on infrastructure under the World Economic forum's Global Competitiveness Index (GCI) 2011-12, lagging behind middle-income countries in Africa. Closing the spending gap from the current budget of USD 1.2bn per annum - some 7.5 per cent of GDP according to the World Bank - gives Ghana the chance to join the ranks of the region's middle-income economies on infrastructure.

The CBD loan will be used for a range of projects including: the Western Corridor Gas Infrastructure; the Western Railway Line Modernisation project; the rehabilitation of Takoradi Port; the Western Corridor Oil Enclave Toll Road project; and the Eastern Corridor Multi-Modal Transportation project.

2.4.2 Air access

a. International air access

In 1996, at the time of the production of the 1996 – 2010 Plan, there were 15 international airlines with scheduled flights to Kotoka International Airport (KIA), plus four cargo airlines. Annual passenger numbers (for 1994) were reported as being 352,000, (including both arriving and departing passengers). It was also noted that there were long term plans to relocate the international airport to a site, already acquired, near Tema.

b. Kotoka International Airport

In 2012, KIA remains the only airport in Ghana in operation for international flights, with no current proposals to relocate to Tema. There are approximately 30 international airlines and six cargo airlines. Annual passenger numbers (for 2011 and including both arrivals and departures, as well as transit passengers) were 1,731,363.[3] Transit passengers comprised 145,761 of this figure. KIA has been undergoing significant expansion to cope with this five-fold increase in passenger numbers since 1994. Phase 3 of the on-going construction project is currently being implemented. There are further, future plans for a USD 180 million terminal expansion although these are currently un-funded.

New carriers and routes are being added with, for example, Iberia starting flights to KIA in July 2012 and Royal Jordanian and Qatar Airways in the process of obtaining licences to enter the market. Air Namibia is shortly to provide a new, direct flight to London, and China Eastern airlines and Air Canada are expected to establish flights to Ghana.

The distribution of international passengers, by region, is shown in Table 13. These figures include both arriving and departing passengers, although exclude transit passengers.

[3] Ghana Airports Company Ltd

Table 13: Distribution of international passengers, by region

Region	Passenger numbers	%
Europe	528,680	33.3
West Africa	441,338	27.8
Middle East	177,296	11.2
North America	173,095	10.9
East Africa	112,105	7.1
Southern Africa	90,401	5.7
North Africa	58,157	3.7
Central Africa	2,573	0.2
Others	1957	0.1
Total	**1,585,602**	**100**

Source: Ghana Airports Company Limited

The relatively high cost of airport taxes at KIA is a concern. Rates are significantly higher than for West Africa in general and these charges are, inevitably, passed onto passengers. Additionally, the relatively high cost of fuel, and the inadequate maintenance and transit facilities at KIA are factors, which further inhibit the growth potential of international flights to and from Ghana. There also remain limitations on the availability of connections within the sub-region. Following the suspension of the routes operated by Ghana International Airlines (GIA), Ghana is now wholly dependent on foreign owned airlines to provide international connections.

c. Potential international airports outside Accra

Funded by the Brazilian Government, there are current proposals for over USD 174[4] million to upgrade the airport at Tamale including the introduction of international flights. The rationale includes; the desire to meet the demand for Haj pilgrimage traffic to Jeddah; to provide a hub to serve the wider region of Burkino Faso and beyond; and to act as a base for cargo traffic to serve the Northern region of Ghana and the wider area.

There are plans to provide a new airport near Takoradi to replace the current facility which is a military airfield but which has been brought into domestic service to meet the demand generated by the oil and gas sector. A decision on whether it is international or solely for domestic services has yet to be taken. The adjacency to Cote d'Ivoire is also advantageous. Feasibility studies have been done and a site near Princess Town has been identified.

With oil reserves identified in the East of Ghana, an additional airport in the Ho region is also being considered. As with Takoradi, no decision has yet been made on whether it would be for international flights or domestic traffic only.

d. Domestic air services

In 1996, the only scheduled domestic air services were from Accra to Kumasi and from Accra to Tamale. Sunyani also had occasional unscheduled flights.

[4] Oxford Business Group (2012) *The Report Ghana 2012* Oxford Business Group

In 2012 there are scheduled services from Accra to four locations as shown in Table 14.

Table 14: Domestic air services, frequency and volume

Route	Airlines	Average monthly aircraft movement (Jan – July 2012)	Average monthly passenger numbers (Jan – July 2012)
Accra – Kumasi	4	495	25,874
Accra – Tamale	3	194	7,528
Accra - Takoradi	5	400	4,363
Accra - Sunyani	2	43	880
Sub total		**1,132**	**38,654**

NB: Aircraft movements and passenger numbers include both arrivals and departures

Source: Ghana Airports Company Limited

- **Key issues include:**

- Passenger numbers are growing although development/expansion of KIA is barely keeping up
- Relatively high airport taxes leading to high air fares
- Relatively high fuel costs discouraging additional flight services
- No Ghana-owned international airline, which would allow more self-determination on flight and routing policy
- New international services at Tamale will increase travel options
- Domestic services are expanding, accelerated by new oil and gas related projects

2.4.3 Maritime water transport and access

Ghana's port infrastructure consists of maritime ports at Tema and Takoradi, two fishing harbours at Tema and Sekondi, a dry dock at Tema, and a small dry dock and slipway at Takoradi. Although the new container terminal, which has recently been built in Tema has considerably eased port congestion, berth capacity is still a major physical constraint as it needs to be increased in order to cater for the regular increase in container traffic, which is by far the main traffic in Tema.

Another physical constraint faced by Ghanaian maritime ports, is depth limitation. At Tema, the maximum depth is found at the new container terminal where it is 11.50m, which is too small to accommodate the increasing size of the container vessels calling in the sub-region.[5]

There are cruise ships calling at both Takoradi and Tema, although the facilities for these vessels and passengers are reputed to be poor.

- **Key issues include:**

- Cruise ships currently utilising Takoradi and Tema, although facilities are poor

[5] Ministry of Transport, Sector Medium Term Development Plan, 2010-2013, July 2011

2.4.4 Inland water transport

Inland water transport, apart from recreational activities, is principally located In Volta Lake, which extends for over 400 kilometres from the South to North, with an area of more than 8,000 square km and a shoreline of some 4,800 km.

Inland water transport has been identified by the Ministry of Transport as a key component of an integrated, multi-modal transport network offering, as yet largely un-proven, potential to provide cost effective transport for socio-economic development of the many communities around Volta Lake. It is also proposed that the lake can provide strategic, cost-effective long-distant routing of bulk wet and dry cargoes in Ghana, including those in transit to and from the land-locked countries of Burkina Faso, Mali, and Niger.

a. The Volta Lake

There is currently a range of services operating within the lake:

Cross-lake ferry services, from Yeji to Makango, Kete Krachi to Kwadjokrom, Kpando to Donkorkrom and Ekye to Adawso, which were established when the lake was formed and are still required to provide for those connections that were in place prior to the flooding of the area. The communities around the lake are highly dependent on the local services and the reliability of cross-lake ferries. They are major determinants of socio-economic activity in those communities.

North-South services are principally for cargo traffic carrying fuel and cement northbound, and returning empty on the southbound leg. There is also some carrying of agricultural goods to assist the local communities along the length of the lake. There are currently no formalised passenger services for transport North-South, although a few cabins are available on the cargo vessels and are usually well utilised, mostly by international tourists. Periodic drops in the level of the lake, however, inhibit longitudinal movement at certain times of year.

Cruise services have developed over the years provided principally by the Volta Lake Transport Company (VLTC) but supplemented by an increasing number of private boat operators. The Dodi Princess, which operated a popular day cruise service from Akosombo to Dodi Island with up to 350 passengers, was damaged by fire in May 2012. It is intended to reinstate the service with a new vessel in Summer 2013, incorporating cabins.

VLTC's traffic probably represents no more than 20 per cent of the total transport activity on inland waterways[6], very little is known about inland water services provided by the informal operators. Ghana Maritime Authority's (GMA) capability to regulate and manage the sector and consequently to facilitate the development of inland navigation on Volta Lake is severely hampered by the lack of available data about the prevailing situation on the Lake and other inland waterways including: navigation conditions; number, characteristics and condition of landing facilities; transport demand; etc.

Transportation on the Volta Lake is faced with some challenges. Existing vessels are in poor condition, laid-up or sunk. Landing stages are in poor condition or non-existent in areas where informal boat operations now abound. Port operations are poorly equipped to handle existing shipments and over 500 unregulated boats provide informal services for passengers and goods around the lake with a consistently poor record of safety and increasing death toll

[6] Ministry of Transport, Sector Medium Term Development Plan, 2010-2013, July 2011

of passengers[7]. Submerged trees are a significant hazard for vessels and are largely uncharted. There is a programme underway to remove the trees, at zero cost due to the value of the timber, but this is expected to take 25 years to complete.

USD 500 million has been identified for investment in significant improvement to services and infrastructure within the lake. The cross-lake ferry routes are intended to be expanded with new boats together with new and improved docking facilities, intended to increase carrying capacity and reliability. Docking facilities will be provided on the edge of Digya National Park opening up improved access for conservation management as well as tourism.

There has also been a boat service on the Volta River, down-stream of the dams, linking to the coat at Ada. However, the extent of weed growth in the river is currently preventing any services from operating.

The lake offers a major opportunity for both transport and recreational activities, providing a physical connection from South to North, to create a tourist movement circuit within the country. Improved boat access opens up opportunities for tourist access to previously remote and inaccessible attractions, such as Digya National Park, as well as numerous locations and communities along the shoreline where tourism-related development could take place and grow. The natural environment of the lake itself is enhanced by the surrounding landscape of hills and mountains, which form a very attractive backdrop to any experience on the water.

➢ **Key issues include:**

- The Volta Lake is a huge natural resource currently significantly under exploited;
- VLTC investment programme is planning to upgrade services significantly including new boats and docking facilities;
- A new proposed dock at Digya National Park allows access to a previously very remote area, with tourism potential;
- Numerous unregulated boats on the lake with a poor safety record;
- Uncharted submerged trees with a removal programme of 25 years;

[7] Ministry of Transport, Sector Medium Term Development Plan, 2010-2013, July 2011

2.4.5 Roads and highways

a. Current situation

Ghana spends an average of 1.5 per cent of GDP on road infrastructure, one of the highest in West Africa, according to the World Bank.

Table 15 Road provision as recorded in 1996 and at end of 2010

	Total length in kms (1996 report)	Total length in kms (end of 2010)
Trunk road	14,753	14,640
Feeder road	22,172	42,210
Urban road	2,018	12,400
Sub-total	**38,974**	**67,450**

Agenda, Annual Progress Report, 2010, NDPC

Source: Implementation of the Ghana Shared Growth and Development

The overall road network at the end of 2010 stood at 67,450 km. This compares with a total of 40,000 km at the time of the 1996 Development Plan report. Figures for trunk, urban and feeder roads from the 1996 report and the end of 2010 are shown in Table 15.

Understandably, the growth in new roads since 1996 is within the feeder roads and urban roads category, as new, local connections are made and more urban areas are developed with a proper road infrastructure.

Of the 14,640 km of trunk roads (end of 2010), 2,499 km are classified as transit corridor routes, those that connect between the major towns within Ghana. Road condition for these trunk roads is shown in Table 16.

Table 16: Condition of transit corridor routes, 2010

	Length / km	%
Good condition	940	38
Fair condition	1050	42
Poor condition	509	20
Sub total	2499	100

Source: Implementation of the Ghana Shared Growth and Development Agenda, Annual Progress Report, 2010, NDPC

Road travel along these transit corridors is prone to delays and congestion, sometimes severe, as a result of poor road conditions (pot holes, un-tarred sections, lack of general maintenance); frequent, severe speed humps; police checkpoints; toll booths; customs posts; and congestion where the roads pass through towns, with hawkers and traffic pulling off the road.

Discomfort from poor road conditions can make journeys additionally tiring with jarring on rough surfaces and frequent braking to avoid obstructions and slow down for traffic humps.

There are only very limited rest stops or services for car drivers, even along the transit corridor routes. Whilst fuel filling stations are frequent and sometimes provide services of toilets and some supplies of food and beverages, the quality and condition of these are variable and are not specifically aimed at long distance travellers and/or tourists.

b. Proposed new road infrastructure

There are strategic plans in place, under the remit of the Ministry of Roads and Highways, for a series of new road corridors that will allow improved access along the major East-West and North-South routes. They are illustrated in Figure 3.

For funding, construction and programming purposes, the corridors are divided into sections. The majority of the sections are funded, divided between several different agencies, including: the Ghana Government; Chinese Government; Brazilian Government; European Union; Word Bank; African Development Bank (AfDB); and the Arab Bank for Economic Development in Africa (BADEA). Delivery of different parts of the network is taking place in a piecemeal manner but all corridors are currently planned to be completed within a 10-year time-frame.

The Eastern corridor, known as the Eastern Corridor Multi-Modal Transportation Project involves a USD 1.8 billion road network linking to Togo at the Southern end and Burkino Faso in the North. It opens up improved access for tourism to parts of Ghana that are currently relatively inaccessible, greatly enhancing opportunities for tourism development.

Figure 3: Proposed new road corridors

Source: Ministry of Tourism, UNDP, UNECA, UNWTO

In addition to the Eastern, Western, Central and Northern corridors, there are plans to provide a completely dual lane road from Accra to Cape Coast. Currently there are dual lanes only at the Eastern end of this corridor, close to Accra.

a. Bus services

There is a comprehensive network of bus services linking the major towns and cities, provided by the State Transport Company (STC) with additional services offered by Metro Mass, also government owned. However, these are not to international standards. For shorter journeys there are taxis and tro-tros, (smaller bus services) which provide a very extensive service although safety and road accidents are a real concern and although licensed, the quality of vehicles and driving standards is inevitably variable. Most tro-tros will only depart when they are full, so overall travel times are unpredictable.

➢ **Key issues include:**

- Only 38 per cent of the key transit corridors are judged to be in good condition
- There is significant congestion and delays on the roads particularly in urban areas
- Travelling is relatively uncomfortably on poor, and pot-holed road surfaces
- There are few rest stops or formal tourist-related services provided
- A significant programme of investment is in place to significantly improve the national road network, estimated to take 10 years to complete
- Availability of international standard bus services

2.4.6 Railways

The original railway system comprised 947 km of route connecting the key centres of Accra, Kumasi and Takoradi with important mining sites in Awaso and Nsutu in the Western region. Due to several decades of neglect and underfunding, the rail network is largely not functioning, except for some limited freight services on the Western line and passenger, commuter services in Accra. However, in the areas where railways are operational, there has been growth in both freight and passenger volumes and numbers, (comparing 200 figures with 2010) although in both cases the growth rates fall below the targets set in the Ghana Shared Growth and Development Agenda (GSGDA) report, 2010-2013.

In the areas where there are no services, signal and communication equipment is obsolete and inoperable, track infrastructure has deteriorated and, where lines have remained unused for many years, encroachment has taken place. Approximately two thirds of the system has not been used for more than 12 years and will require complete re-construction in order to restore services.[8]

There are current proposals in place to restore parts of the railway network. A new rail line will be re-established between Takoradi and Kumasi, funded through a USD 500 million loan from the China Development Bank, with a three-year programme starting in 2012. It will involve a completely new track with a different gauge from the existing line and will increase potential speeds on the line from 56 to 120 km per hour. Operations are anticipated as being carried out through Public Private Partnerships (PPP).[9]

The Ghana Railway Development Authority (GRDA) has commissioned a Railway Master plan or Ghana, looking at the entire network and considering the development and operation

[8] Ministry of Transport, Sector Medium Term Development Plan: 2010 – 2013, July 2011
[9] Oxford Business Group, The Report, Ghana 2012

of national and suburban railway systems. This includes the restoration of existing lines, including conversion to standard gauge, as well as the scope for new lines and routes within the country as a whole.

The new line and the potential for further investment as a result of the railway master plan study, offers an opportunity for additional options for travel around Ghana as well as specific, railway-based tourism activities and products.

➢ **Key issues include**

- The majority of the rail network is irreparably damaged
- New lines are being constructed to modern standards
- A railway master plan study will explore the viability of restoring more lines and the potential to extend the network to other parts of Ghana
- A more substantial, integrated and modern railway network offers opportunities for tourist movement as well as specific railway based tourism activities

2.4.7 Energy

Currently most of the energy (69 per cent) consumed in Ghana comes from bio-mass, comprising burning of wood and charcoal for domestic cooking. Imported petroleum products, primarily for fuel, accounts for 21 per cent, whilst electricity makes up the remaining 10 per cent. It is, however, the electricity component of these total energy needs that is the most significant component in relation to tourism development.

a. Electricity

The state-owned Volta River Authority (VRA) is involved in power generation in the country. It owns and operates the Akosombo Hydro Power Station, Kpong Hydro Power Station and the Takoradi Thermal Power Plant situated at Aboadze, as well as a thermal plant at Tema. VRA is also a minority joint partner with TAQA, a private sector company, which owns and operates the Takoradi International Power Company (TICO) thermal plant, also located at Aboadze. Bui Power Authority, another state-owned agency, is implementing the Bui Hydroelectric Power Project, while a number of private Independent Power Producer (IPPs) projects have been licensed and are at various stages of development.

Hydropower accounts for 68 per cent of electricity generation (2011) with the remainder largely in thermal plants. Modern renewable – i.e. solar and wind – account for just 0.1 per cent of supply although government policy on energy has set targets of 10 per cent of domestic demand to be met in this way, which means as much as 500MW according to calculations by the Ministry of Energy. The Ministry of Energy believes that 200-300 MW of wind power, 20 MW of solar power, 150 MW in small to medium hydro power and 90 MW in bio-mass can be realised by 2020.[10]

The National Interconnected Transmission System (NITS) for electricity is owned and operated by the Ghana Grid Company Ltd (GRIDCo), which is state-owned. The distribution of electricity is mainly done by two state-owned enterprises, namely the Electricity Company of Ghana (ECG) and Northern Electricity Department (NED), which is a subsidiary of VRA. ECG distributes electricity in the Southern part of the country; NED distributes power in the Northern part of the country, while Enclave Power provides power to the Free Zones.

[10] Oxford Business Group (2012) *The Report Ghana 2012;* Oxford Business Group

National access to electricity has been growing steadily from 15 per cent of the population in 1990 to 72 per cent by the end of 2010. The Ministry of Energy goal is to have 80 per cent access to grid electricity by 2015. Sparsely populated areas in the Northern region have been targeted for solar / wind.

Electricity exports have provided an important source of foreign exchange earnings for the country as Ghana exports power to the neighbouring countries including Togo, Benin, and Burkina Faso. On the other hand Ghana imports power from La Cote D'Ivoire when necessary.[11]

The quality and consistency of supply is variable, with outages frequent, even in the major cities and although all parts of the tourist areas have a supply, without which they could not function, tourism development is some areas is constrained by the lack of basic services. Larger hotels have to purchase and run their own generators to ensure supply, which is costly and inconvenient. In more remote areas, solar systems are the only viable means of electricity supply, although for small-scale facilities this is not capable of servicing energy-hungry equipment such as air conditioning.

- **Key issues include:**

- National access to electricity was 72 per cent at the end of 2010
- Renewables (solar and wind) currently only 0.1 per cent but government target of 10 per cent
- Outages are frequent even in the cities
- Larger development, such as hotels, have their own back-up supply generators but this adds to accommodation costs

2.4.8 Water supply

Consistent, adequate and safe water supply is a critical component of any tourism development. Whilst drinking water is likely to be bottled, the cleanliness of water used for activities such as hand washing and food preparation can impact on the general health and well being of tourists as the population in general

The two agencies operating under the Ministry of Water Resources Works and Housing responsible for the supply of safe and affordable water are the Ghana Water Company Limited (GWCL) for the urban areas and Community Water and Sanitation Agency (CWSA) for the rural communities and over 100 small town piped water systems. The policy objectives of the GSGDA are: (1) accelerate the provision of affordable and safe water; and (2) Develop capacity to manage water resources at all levels.

All the current principal tourist zones have a water supply, although developments in more remote zones, such as protected areas, are much less likely to be able to utilise existing water supply networks. In these areas, each site will have its own specific criteria in respect of access to fresh water, whether from boreholes or from lakes and/or rivers.

Within Ghana as a whole, the percentage of the population with access to safe water in urban areas was estimated at 58 per cent in 2010, while for the rural areas it was 60.8 per cent. Comparisons of access to safe water at the regional level, range, for urban areas, from a low of 10 per cent in the Upper West Region to a high figure of 74 per cent in the Greater

[11] Ministry of Energy (2010), *Energy Sector Strategy and Development Plan, February 2010*, Ministry of Energy, Republic of Ghana

Accra Region. For the rural areas, the lowest is 52.45 per cent in the Western Region to a high of 76.94 per cent in the Upper West Region.

- **Key issues include:**

- All principal tourist areas have a water supply
- More remote development areas, such as national parks, may have to rely on boreholes or lake/river water if available
- There was 58 per cent of the population with access to safe water (2010 figures)

2.4.9 Sanitation

The percentage of people with access to improved sanitation has increased from a low of 8 per cent in 2003 to 13 per cent in 2010. This is attributed to the construction of improved sanitation facilities for households, schools and the public.

Figures recorded for 2010 indicate: accessibility to domestic toilets was 15 per cent; the percentage of basic schools with adequate toilets was 53 per cent; and the proportion of solid waste generally disposed of in the major towns and cities increased was 75 per cent.

2.4.10 Telecommunications

Since 1996, the growth of the mobile phone network and its common usage has transformed telecommunications and given vastly improved access to phone services and connections. Mobile phone services in Ghana are relatively cheap, thanks to healthy competition and coverage is generally good within the tourism areas. Purchasing a mobile phone SIM card for use in Ghana requires registration, following changes in the law in 2010.

In 2010, the penetration rate of fixed lines was 1.1 per cent and in the first quarter of 2012, that of mobile lines 87 per cent, compared to an African average of 53 per cent.[12] The subscribers of internet service for the entire population almost doubled from 2,300,000 in 2009 to 4,200,000 in 2010. The number of authorised providers of Internet service stood at 90 in 2009, of which 35 were in operation. Broadband capacity made available for ICT development also increased in 2010 from 120Gbp/s 2009 to 2,040Gbp/s; with the cost of international connectivity for ICT operators declining over the period.

Internet access is generally available within urban areas but the viability of providing services in rural areas is currently some way off. Access to the internet via the mobile phone is more available for most.

[12] Oxford Business Group (2012) *The Report Ghana 2012;* Oxford Business Group

2.5 Market conditions and current marketing actions

2.5.1 Domestic tourism in Ghana

Domestic tourism has been increasing as the economy has been growing. The number of Ghanaians and residents visiting major sites rose 5.3 per cent in 2011, generating 763,461 visits and USD 987,000 in entrance fees (Ghana Tourism Overview 2012).

Based on the latest Ghana Living Standards Survey – Report (September 2008), **domestic tourists are mostly aged between 25 and 64** (60%). There is no significant difference between men and women travelling for tourism purposes within Ghana (see Table 17). The older visitors classified as the silver hair market segment are the group that travel the least (5.5% of domestic visitors).

Table 17: Sex and age of domestic tourists

Age	Male %	Female %	All %
0-14	17,6	18,0	17,8
15-24	16,4	17,2	16,8
25-44	37,8	38,9	38,4
45-64	22,3	20,7	21,5
65+	6,0	5,1	5,5
All	100	100	100

Source: Ghana Living Standards Survey, September 2008

Based on the Ghana Living Standards Survey, about three-quarters (74%) of same-day visitors and over four-fifths (85%) of domestic overnight visitors each made less than five trips per year. Males tend to make more trips than their female counterparts as shown in Table 18.

Table 18: Number and profile of domestic overnight visitors

Number of trips	Male	Female	All	Estimated No. of Visitors
Below 5	83,8	85,8	84,8	3,994,700
5-9	10,5	9,7	10,1	473,690
10-14	3,6	3,2	3,4	158,880
15-19	0,6	0,6	0,6	29,133
20-24	0,9	0,4	0,7	31,546
25+	0,5	0,4	0,4	20,475
All	100,0	100	100,0	4,708,424

Source: Ghana Living Standards Survey, September 2008

Domestic excursionists as well as tourists seem to prefer Ashanti, Eastern and Central regions and Greater Accra to visit as shown in Table 19.

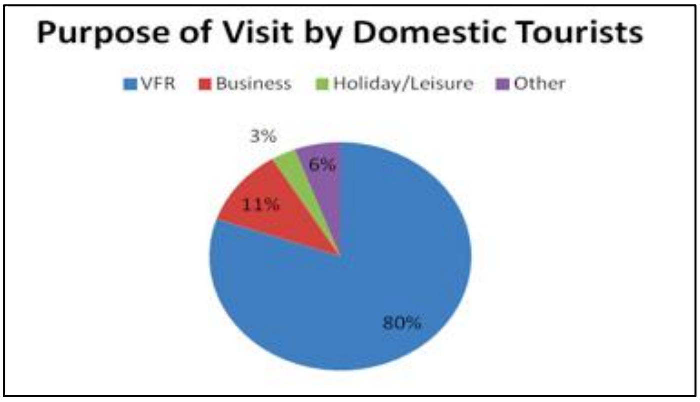
Table 19: Regions visited by domestic same-day and overnight visitors

Region visited	Same-day visitors		Overnight visitors	
	Proportion (%)	Estimated No. of visitors	Proportion (%)	Estimated No. of Visitors
Western	3.9	95,291	8.1	378,875
Central	13.2	325,430	12.5	589,646
Greater Accra	13.2	325,275	16.2	762,463
Volta	9.6	236,892	11.3	530,525
Eastern	19.4	476,891	15.8	744,939
Ashanti	29.5	725,664	20.2	951,507
Bronq Ahato	4.3	105,374	6.8	317,776
Northern	2	48,307	4.6	217,470
Upper East	0.8	19,547	2.5	117,775
Upper West	4	98,762	2	93,042
Total	**100**	**2,457,433**	**100**	**4,704,018**

Source: Ghana Living Standards Survey, September 2008

Domestic visitors travel mostly by road (97% of same-day visitors and 99% of overnight visitors). **The main purpose for travelling within Ghana is to visit families and friends** followed by attending funerals and business meetings. In 2005-2006, only a small proportion of domestic visitors (3%) indicated that they travelled for holiday and leisure purposes. However, this is believed to have change since the last Living Standard Survey. Unfortunately, there is no updated research to support this statement. Another Living Standard Survey is being prepared and will most likely be conducted in 2013.

Figure 4: Purpose of visit by domestic tourists



Source: Ghana living standards survey, September 2008

Figure 4 shows purpose of visit grouped in the following categories:

- **VFR:** visiting friends and relatives, funerals, marriage ceremonies, birthday parties, graduation ceremonies, and open days

- **Business/Professional:** business, professional, government affairs, conferences/ workshops
- **Holiday/leisure:** holiday, vacation, leisure, cultural festivals, sports/recreation
- **Other:** religious/pilgrimage, studies, teaching, health, other

The average length of stay for overnight trips was 10.5 nights in 2005-2006 as shown in Table 20. Close to 82 per cent stay with their friends and relatives and roughly 10 per cent in private houses. Only 1.4 per cent reported to have stayed in hotels and 0.1 per cent in holiday resorts in 2005-2006.

Table 20: Type of accommodation used by domestic tourists

Type of accommodation	Proportion %	Average length of stay
Hotel (other lodging services)	1.4	6.7
Guesthouse	0.7	6.9
Health establishments	0.9	7.5
Educational institutions	1.6	9.7
Work/holiday camps	0.4	11.5
Hostels	0.5	25
Holiday resorts	0.1	5.4
Tourist camp sites	1.3	9.9
Friends'/relative's residence	81.7	10.6
Private home	10.5	10.4
Others	0.9	7.7
Total	**100**	**10.5**

Source: Ghana Living Standards Survey, September 2008

Domestic excursionists and domestic tourists tend to **arrange their own trips**. Table 21 shows that less than 10 per cent of domestic visitors travelled on package tours in 2005-2006.

Table 21: Type of tours - domestic excursionists and overnight visitors

Type of tour	Excursionists %	Overnight visitors %
Package tour	9.2	8.1
Self arranged	90.8	91.9
Total	100	100

Source: Ghana Living Standards Survey, September 2008

Most domestic trips are self-financed. About three-quarters of the domestic same-day visitors and two-thirds of the domestic overnight visitors are self-financed. Household members sponsor some 20 per cent of the domestic same-day visitors and nearly 28 per cent of the domestic overnight visitors. Private organisations sponsor just 2 per cent of domestic same-day and 1 per cent of overnight visitors. The Government and international organisations sponsored less than one per cent of same-day and overnight visitors. A larger percentage of men pay for their own domestic trips compared to their female counterparts.

The survey conducted in September 2005 and September 2006 indicates that the majority of Ghanaians do not visit the country's tourist sites. Nearly 97 per cent of respondents had not visited any tourist site. Kumasi Zoological Gardens and Kakum National Park are the two main sites to which most of the domestic same-day visitors travelled to, followed by Boti Falls, Lake Bosomtwi, Accra Zoological Gardens and Cape Coast Castle. The main sites visited by domestic overnight visitors are Kakum National Park, Kumasi Zoological Gardens and Cape Coast Castle. Other tourist sites visited by overnight visitors are Elmina Castle, Accra Zoological Gardens, Boti Waterfalls, Kwame Nkrumah Memorial Park and Lake Bosomtwi.

More recent statistics indicate that Kakum National Park (159,535), Cape Coast (74,220), Kumasi Zoo (66,161), Elmina Castle (64,105) and Manhyia Palace Museum (44,824) were preferred places to visit among domestic tourists in 2011 (see Table 22).

Table 22: Number of visits to major tourist sites in 2011

	2011		
	Domestic	International	Total
Eastern Region			
Bunso Arboretum	575	182	757
Aburi Botanical Gardens	n.a.	n.a.	n.a.
Volta Region			
Wli Waterfalls	21,474	8,751	30,225
Tafi-Atome Monkey Sanctuary	5,348	3,870	9,218
Tagbo Waterfall/Mt. Afadja-Liati-Wote	11,543	1,940	13,483
Mt. Gemi-Amedzofe	943	383	1,326
Xavi Bird Sanctuary	0	62	62
Kyabobo National Park	442	118	560
Upper East Region			
Sirigu Womens Organisation for Pottery and Art	796	1,201	1,997
Zenga Crocodile Pond	4,265	338	4,603
Chief Crocodile Pond	578	256	834
Pikworo ((Nania) Slave Camp	2,787	906	3,693
Tongo Hills/Tengzug Shrines	848	820	1,668
Northern Region			
Mole National Park	8,909	5,790	14,699
Mognori	105	1,005	1,110
Western Region			
Osagyefo Dr.K Nkrumah Mausoleum	n.a.	n.a.	n.a.
Wassa Domama	381	122	503
Nzulezo	2,463	371	2,834

Ankasa Resource Reserve	453	124	577
Ashanti Region			
Adanwomase	92	675	767
Bobiri Forest and Butterfly Sanctuary	1,981	1,561	3,542
Prempeh II Jubilee Museum	4,241	403	4,644
Manhyia Palace Museum	44,824	7,030	51,854
Kumasi Armed Forces Military Museum	6,872	376	7,248
Kumasi Zoo	66,161	1,003	67,164
Obuasi Mine Tour	n.a.	n.a.	n.a.
Bonfobiri Wildlife Sanctuary	n.a.	n.a.	n.a.
Ntonso Visitor Receptive Facility	n.a.	n.a.	n.a.
Komfo Anokye Sword	3,949	484	4,433
Upper West Region			
Wechiau Community Hippo Sanctuary	767	794	1,561
Central Region			
Elmina Castle	64,105	17,572	81,677
Cape Coast Castle	74,220	23,375	97,595
Kakum National Park	159,535	201,532	361,067
Greater Accra Region			
Kwame Nkrumah Memorial Park (mausoleum)	42,252	17,816	60,068
Du Bois Memorial Centre	97	890	987
National Museum	6,523	5,409	11,932
Shai Hills Resource Reserve	9,988	2,923	12,911
Ada Resort	n.a.	n.a.	243
Brong Ahafo Region			
Tano-Boase	n.a.	n.a.	n.a.
Kintampo Waterfalls	7,538	1,544	9,082
Buoyam Caves and Bats Colony	75	183	258
Boabeng-Fiema Monkey Sanctuary	3,079	610	3,689

Source: Ghana Tourism Authority (2011)

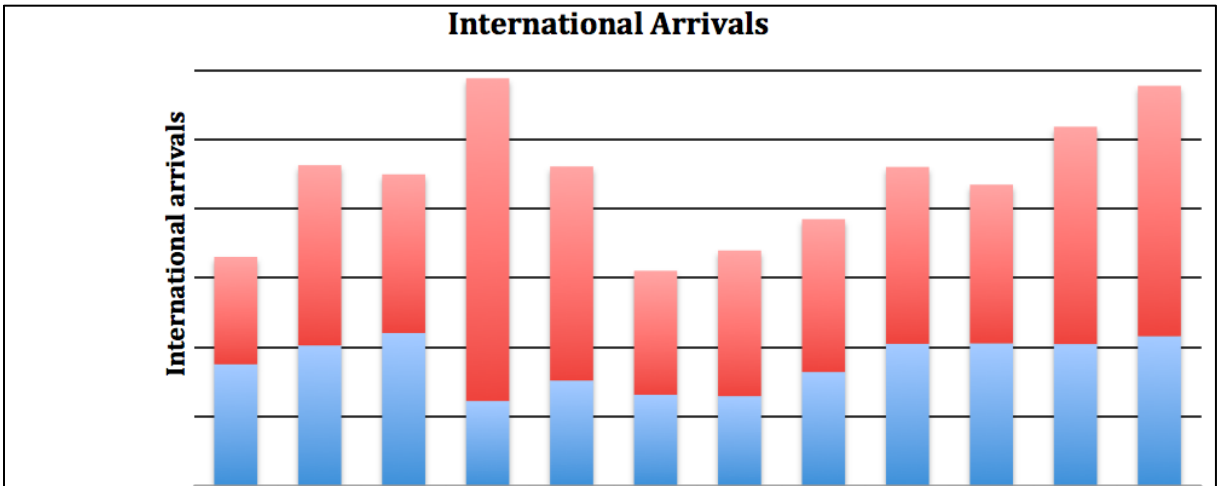
2.5.2 International tourism in Ghana

In the 1996-2010 Plan, total international tourist arrivals were targeted at 638,000 for 2005 and 1,062,000 for 2010. The volume targets for 2010 were not fully reached but were close with 931,224 arrivals. In 2011, Ghana passed the one million mark (GTA statistics) in international arrivals.

These volumes are, however, questionable as according to the immigration, the number of non-Ghanaian arrivals at the entry ports was 577,661 of which 37 per cent from ECOWAS countries and 63 per cent from other countries in 2011. In 2010, the total number of international arrivals was 518,571. Therefore the growth between 2010 and 2011 was 11 per cent.

Both GTA and immigration statistics show two digit growth rates but the one based on immigration statistics is more moderate than GTA growth rate, which is based on provisional estimates. Another reason for the variation in arrival volumes might be the fact that some of the overseas Ghanaians have dual passports and will enter Ghana with their Ghanaian passports. The following figure shows the trend in international arrivals based on immigration statistics. Ghana was negatively affected by the 9/11 as well as the financial crisis. However, the average annual growth rate has been positive, around 5 per cent between 2000 and 2011.

Figure 5: International arrivals based on immigration statistics
(excludes people travelling with Ghanaian passports)

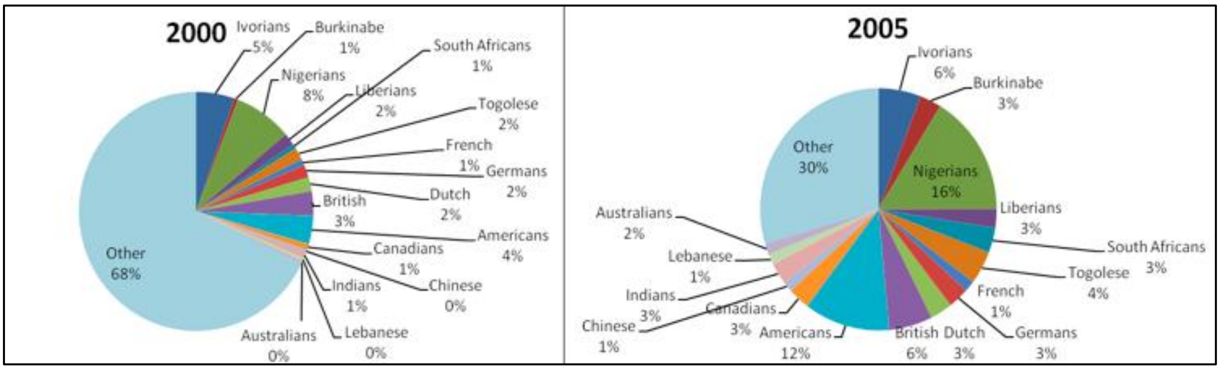


	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Other foreigners	155096	260406	229236	466195	309224	179149	210415	220869	255581	229290	314027	361710
Ecowas	175410	202611	220520	122332	151917	131359	129327	164209	204868	205604	204544	215951

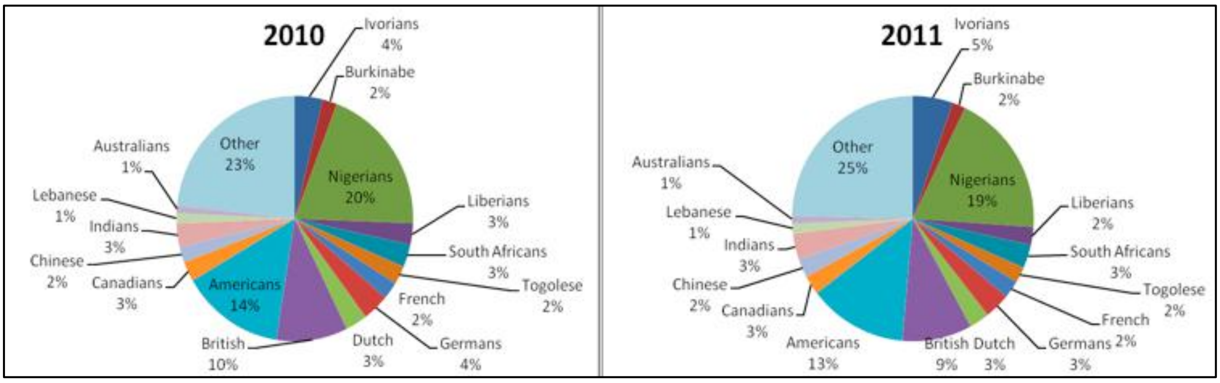
Source: Ghana Immigration

Foreign tourism is quite concentrated in a few key source markets. The top 8 foreign source markets – Nigeria (19%), the USA (13%), UK (9%), Cote d'Ivoire (5%), India (3%), Germany (3%), South Africa (3%), and the Netherlands (3%) – comprised 60 per cent of all foreign arrivals in 2011 (Ghana immigration, 2012). As illustrated in the following figures, there have been no major changes in the market structure since 2005.

Figure 6: Key source markets between 2000 and 2011



Source: Ghana Immigration



Source: Ghana Immigration

Based on GTA 2009 statistics, the main purposes of visit are professional-related travel (business, conferences, study/training), comprising 40 per cent of arrivals and visiting friends and relatives (VFR) comprising a further 25 per cent of arrivals. Holiday travel comprises only 19 per cent of arrivals. The length of stay, based on discussions with business tourists, varies from two nights to six weeks. Average expenditure per visitor was USD 2,013 in 2010.

Based on the survey conducted among 196 Ghanaian adults residing in Atlanta in March and April 2004, most of the overseas Ghanaians tend to visit Ghana every two years (12%) or three years (18%). The majority of them (47%) stay 2-4 weeks and mostly stay at their own houses or with their relatives. Close to 80 per cent indicated that they are very likely to return to Ghana and are willing to act as ambassadors for Ghana i.e. recommend Ghana to their friends and relatives. It should be noted that the interviewed tour operators in October 2012 indicated that the number of African-Americans is decreasing and the number of white Americans is increasing. This, however, is hard to verify as it is not exactly clear whether Ghanaians residing in North America enter Ghana with their Ghanaian passports.

A sample survey among 200 visitors from the neighbouring countries – Nigeria, Ivory Coast, Togo and Benin – was conducted in March and April 2004. Almost half of the respondents visit Ghana more than once every year and close to one third once a year. The main motivation is to visit friends and relatives (34%) followed by seeing tourists attractions (17%), business purposes (8%), and Rest and Recreation – R&R (7%). Close to 45 per cent stay less than two weeks while 39 per cent stay between 2 and 4 weeks. They prefer to stay in hotels and guesthouses (39%) and roughly one third stay with friends. Many also have relatives in Ghana. The tourist sites mostly visited by the tourists from the neighbouring countries include Kumasi, Cape Coast, Elmina Castle, Boti Balls, Accra, Mole Park, Volta region and Ankasa Forest Reserve. Most of the respondents would return to Ghana and 92 per cent have recommended their friends to visit Ghana. The tourist sites recommended include Aburi Gardens and Hobide, Tamale, Wa, Bolga, Bawka, Paga, Kumasi and Cape Coast and Volta Region. Hotel managers interviewed in October 2012 stated that they are currently targeting the middle and higher income market segments in the neighbouring countries, especially Nigeria, to fill hotel rooms at weekends in Greater Accra region.

Most visitors to Ghana arrive by air (89%). Less than 0.5 per cent arrives by sea and roughly 10 per cent by land. (Ghana Immigration) Two ports in Ghana – Takoradi and Tema – are featured on international cruise itineraries. The following operators cruise the West African coast: Fred Olsen, Saga Ruby, Spirit of Adventure, Hapag Lloyd, and Albatross. These cruises bring both North Americans and Europeans, especially Germans, Danes and British. Sea cruise passengers belong mostly to the silver hair market segment. Based on interviews with tour operators in October 2012, interest in cruising around West Africa is increasing among the European markets.

2.5.3 Current marketing, promotion and branding initiatives

a. Marketing and promotion

A national tourism marketing strategy covering 2009 to 2012, aimed at making tourism the leading sector of Ghana’s economy. The strategy was prepared in collaboration with the Ministry of Tourism, the Ghana Tourist Board and the Ghana Tourism Federation with support from the Japan International Cooperation Agency and SNV Netherlands Development Organisation in 2008.

The following shows the vision, mission, goals and objectives of the marketing strategy:

Vision: to be the tourism hotspot of West Africa

Mission: to outperform Senegal as the tourism hotspot in West Africa

Strategic Goals

- The primary goal is to differentiate Ghana from competing countries in West Africa
- The secondary goals are to position Ghana as an eclectic ‘must see’ destination that offers diverse tourism opportunities in West Africa; to raise awareness of Ghana as a tourist destination; to improve the knowledge of Ghana among international tour operators and package holiday companies; to educate Ghanaians living in Ghana about tourism products and tourism potential; to encourage Ghanaians in the diaspora to visit Ghana and invite their friends to visit Ghana

Strategic Objectives

- The primary objective is to increase Ghana’s share of West African tourists from 12 per cent to 20 per cent by mid-2012
- The secondary objectives are to increase the number of tour operators that offer packages to Ghana; increase the average expenditure of tourists; improve the geographic spread of tourists; increase the length of stay of tourists; smoothen seasonal demand; increase the propensity to recommend to friends; increase loyalty

measured through repeat visits.

The strategy sets a target of attracting one million tourists annually by 2012 and to achieve this it identifies the critical success factors presented in the following table:

Table 23: Critical success factors for achieving Ghana's marketing strategy

Critical success factors	Update
Product improvement and development	
Developing airlines and national and regional airports	Airline capacity has grown rapidly, from 24 carriers servicing Ghana in June 2011 to 34 by July 2012, with expectations that six more will be added by the end of 2012. Domestic flights have also received a boost as internal traffic rose 60 per cent in 2011 following an increase in the number of airlines connecting Ghana's five airports and the offering of more affordable flights.
Improving the quality and pricing of hotels	Offers hotels at various star levels. However, the pricing structure has remained the same. Value for money is an issue, especially for leisure tourists.
Simplifying the visa regime and reducing the price	No changes.
Improving accessibility of tourism sites	To some extend improved.
Improving packaging of tours	GTA has arranged training for tour operators. However, there is still room for improvement.
Offering better value for money	No changes.
Information and Communications Technology	
Exploiting technology by increasing access to broadband, improving the online performance of industry organisations, and developing a marketing information system to help with the collection, analysis and dissemination of market intelligence for decision-making.	Web-presence is there, but interactivity could be improved. With regards to market intelligence, no changes.
Marketing	
Attending international exhibitions at major source markets	Regular attendance at WTM in UK; ITB in Germany; Vakantienburs in the Netherlands; Fitur in Spain; Sitho in Burkina Faso; Akwaaba in Nigeria. No travel trade fairs have been organised in Ghana in the recent past. US and China have been attended but not on regular basis. Private sector attend Indaba in South Africa.
Developing integrated and consistent marketing communications	Message in promotion is not consistent.
Improving awareness in key source countries	Limited international media exposure. Travel writers have been approached to write articles about Ghana but only to limited extent. Major hotels (4-5 star) in Accra organise fam tours for tour operators and media from the neighbouring countries. Awareness/press events organised for the press in Ghana; fam tours organised for selected media

	from UK, France and China
Enhancing links with international tour operators and package holiday websites	Links with international tour operators are mostly done based on the meetings at fairs; fam tours. Tour operators have their own links and collaborators they nurture.
Establishing tourist information offices	Every regional tourist office has a TIC. Added to this are the three TICs at land border-crossings (at Elubo, Aflao, Paga) and at the international airport in Accra.
Improving direct marketing	No specific direct marketing campaigns as such. Information is send to the Ghanaian embassies abroad.
Using guerrilla promotional methods such as enlisting the support of Ghanaian footballers playing for top European Clubs	Ghana has not taken advantage of famous Ghanaian football players to its full potential. One example is WTM where one famous football player was present at the Ghana stand and attracted quite a lot of people to the stand.
Public Relations	
Developing a crisis communications strategy	No change.
Heightening public relations efforts	Add-hoc efforts.
Education and training	
Developing human resources in tourism by implementing industry-wide training interventions, encouraging continuous professional development and continuous training of frontline staff	Hotel and tour operator associations organise training seminars for their members. There is a need to structured refresher training for the staff already working in the industry.
Educating local human resources	Vocational training sector is weak. This is desperately needed based on the interviews with the private sector.

Source: GTA

In 2011, the marketing budget was less than GH¢ 500,000 which equals to USD 265,000. Out of this budget, around 75 per cent was used for international fairs and the remaining 25 per cent to fund brochures as well as local promotional events and conferences. The 1% levy is envisaged to support marketing and promotional activities in the future.

The current marketing budget to promote Ghana as a tourist destination is modest. For example, Senegal had a marketing budget of CFA 1.5 billion (around USD 3.5 million) in 2009. It should, however, be noted that it is not clear whether this budget includes salaries and other fixed costs or whether it is purely for marketing and promotional purposes. In 2009, the Senegalese hotel industry employers' labour union demanded a CFA 12 billion (USD 27 million) budget to promote tourism industry. During the same year, Senegal had plans to reopen their representative office in Paris, relocate their office in the USA from New York to Atlanta, Georgia (strong African-American community), open offices in Spain, Belgium and Italy and link up with Moroccan tour operators.

Advertising, public relations and promotion must complement informal information obtained through word of mouth and personal recommendations, by either building upon the latter or correcting negative perceptions that may be incorrect.

Developing a strong image for any brand requires a carefully planned brand strategy based on:

- well-defined and unique brand personality
- correct positioning strategies
- themed product development
- consistent and appropriate advertising and promotion
- careful brand guardianship

Due to the lack of clear branding strategy and careful brand guardianship, the current promotional material mostly promotes everything to everybody. There is very little promotional material targeted to specific market segments excluding the material prepared by NGOs targeting tourists interested in community based tourism combined with culture and nature. The material promoting Accra as a MICE (meetings, incentives, conferences and events) destination is almost non-existent and promotion is not proactive. The four- to five-star hotels directly promote their own facilities.

Ghana has two websites: www.ghana.travel and www.touringghana.com. The latter states that it is the official website of Ghana Tourism. Neither of these websites featured among the first five sites when the key word ‘Ghana’ was entered in Google search. Being listed among the first four sites is essential as eye tracking studies have shown that when reading search engine results the amount of time spent of any but the top rankings is short. The optimisation goal is to be rank on the first page of results. The message presented should be clear and actionable.

According to the UNWTO and ETC Handbook on E-Marketing for Tourism Destinations (2008) successful websites have:

- accessibility as the basis for website quality
- followed research-based guidelines to create an easy-to-use website that builds trust and identity
- smoothed the path through the ‘customer journey’ or ‘experience cycle’ (dream and select; plan; book; visit; post-visit recollection & recommendation)
- delivered and fulfilled services through content and functionality
- conducted tests along the design and development process of the website

Critical aspects to make a quality website therefore include

- accessibility
- identity and trust
- customisation and interactivity
- navigation
- search engine optimisation
- technical performance
- willingness to serve (information services, contact services, relationship services, transaction services, and entertainment services)

Based on the customer journey approach an analysis of Ghana’s tourism websites reveals the following:

- ***General:*** appears busy; no specific section for travel trade and media where Ghana would be able to better manage its brand identity, values and messages; in the travel trade section there could also be training packages for the travel trade sales personnel to learn more about Ghana (e.g. Australia is training its 'Ozzy' specialists through the web); www.ghana.travel does not have up-to-date information – the section 'exclusive to Ghana' highlights past events and not up-coming events.

- ***Dream and plan:*** the interactive route planner does not exist (instead a few sample itineraries); there is a link to facebook; special events to attract last minute decisions to choose Ghana as a tourist destination are missing
- ***Book:*** www.touringghana.com lists tour operators through which booking is possible but a lot of contact details are missing, especially e-mail addresses
- ***Visit:*** virtual tour and video included in the www.ghana.travel
- ***Post-visit recollection and recommendation:*** photos to download in the www.ghana.travel site links to facebook; news on new developments, activities, sites to attract repeat visits is limited

b. Branding

Ghana does not have a clear and implementable tourism brand strategy, which might have created a confused image to prospective customers. When people decide on a destination for a holiday, several brands compete for their attention. A strong brand is differentiated from others and has an attractive appeal to consumers. In tourism, while factors such as cost of travel, convenience, and quality of facilities are important, image is a strong motivator. Image puts a destination on the consumer's shopping/wish list and creates an emotional appeal, which enhances destination's chances of being chosen over others. If the image is unfocused or not clear, the destination will have difficulty competing with images created by competing destinations.

The current status of tourism destination branding can be summarised as follows:

i. Brand Ghana nation branding

"Nation branding" refers to development of an encompassing brand identity that covers all elements of Ghana's image. The nation brand is used for promoting the country as an investment, trade, residential and tourism destination. It is meant for use by all sectors, businesses, government departments, opinion leaders and other individuals that promote Ghana. In addition to external marketing, a prime objective of nation branding is to instil a sense of national pride and loyalty by communicating the brand values and symbols domestically and getting the public to adopt the brand values.

In 2009 former President Mills established the Brand Ghana office with the mandate of coordinating the development of a compelling national brand for Ghana. The objectives are to stimulate national confidence, craft national identity and provide clear, believable and positive communication about the country and its vision.

According to the Brand Ghana office, Ghana's differentiation must be grounded in its people and this implies that the process of citizenship development must be conscious and proactive.

The branding programme involves the crafting of the national identity and competitive strategy with which the nation can compete to win. This will involve basically:

- Brand Ghana positioning
- Overall Brand Ghana Promotion
- Management of Brand Ghana Reputation/Image

The "Brand Arch" model has been used to define the brand identity. The brand positioning is "For everyone in Ghana and around the world in search of sustainable prospects and superior citizen value, Ghana is the welcoming oasis of hospitality, stability and opportunity". The brand values include freedom, openness, inclusivity, loyalty and integrity and the nation brand essence is "The oasis of Hospitality, Stability and Opportunity".

The Brand Ghana logo uses the name "Ghana" as its main image in modernised font style complemented by an energetic image of the black star flag symbol. It is based on the colours of the Ghanaian flag. The slogan "Uniquely Welcoming" is meant to convey the special hospitality and warmth of the Ghanaian people. The slogan is somewhat ambiguous given that hospitality and friendliness are claimed as Unique Selling Points (USPs) by various West African destinations such as Senegal, The Gambia, etc.

Among others the Brand Ghana programme aims at:

- National mobilisation, identification of core national brand values and a call on everyone in the country to enact these brand values.
- Providing clear, believable and positive communication of what the country really is, what it stands for and where it is going.
- Creating more harmony and coordination among stakeholders to tell the same powerful, believable and interesting story about their country.

Internally, Brand Ghana programme will work to stimulate relevant creativity and innovation among stakeholders around the national competitive strategy, and to unite the nation under a common vision and shared values. Brand Ghana would be a complete outfit on its own and not duplicate activities of other organisations such as Ghana Tourist Board, Ghana Investment Promotion Council, the National Development Planning Commission, etc.

➢ *While Brand Ghana was at the early stages of brand development and promotion during the formulation of this master plan and the exact programme of action and potential synergies with tourism were in process of development (Brand Ghana aimed to launch the programme in November 2012), it will be very important for the tourism brand to explore and establish tight synergies with the nation brand. Such synergies in brand proposition and brand values should be clearly conveyed in visual, written and vocal communications.*

ii. Tourism branding

Ghana's tourism branding has changed frequently over the past decade. Among earlier slogans used for promoting destination Ghana were:

- Ghana: a Golden Experience
- Ghana: Black Star of Africa

The current logo and slogan used in tourism destination promotions comprises of the name "Ghana" in informal font style, with letters filled by Kente colours and patterns and underscored by a ribbon containing the flag colours.

The slogan "Culture, Warmth and Much More…." is used in collaboration with the logo.

The following points are considered opportunities for improvement of the current destination logo and slogan are:

- *The logo and slogan design (patterns, colours, proportions, etc.) is not of optimal quality and the logo does not reproduce well. Among others the Kente colours and patterns detract from the sharpness of the logo. The length of the slogan and the weak font style used also detract from the legibility of the logo, especially when it is reduced in size.*

- *The logo conveys a sense of informality and a traditional ethnic feel. While this may appeal to the current visitor segments (volunteers, independent beach holidays, etc.) it may limit the scope for evolving towards a more modern, higher quality destination image that appeals to higher spending travellers.*

- *The slogan "Culture, Warmth and Much More…" is long and as a result it is difficult to reproduce in a crisp and legible manner. The slogan does not roll off the tongue easily. It also focuses largely on the tangible assets and hospitality and does not fully communicate a differentiated value proposition that sets it apart from competitors as a tourism destination.*

- *The current logo and slogan are not consistently applied and do not appear on key marketing collateral such as the website, printed marketing materials, corporate literature, etc.*

The tourism brand architecture (i.e. how the brand is used is also fairly fragmented. The following are some of the brand logos used for tourism marketing purposes:

- Ministry of Tourism uses the official Government of Ghana emblem, without any destination brand reference or co-branding.

- Ghana Tourism Authority uses a corporate a logo, sometimes in combination with the destination marketing logo cited above.

- Regional destination marketing brands like Savannaland and West Coast.

➢ *The proliferation of visual identities without a common visual identity or link dilutes the brand message. It will be important to develop an acceptable tourism destination identity that can be used jointly with existing tourism identities to ensure greater cohesion and impact of destination communications.*

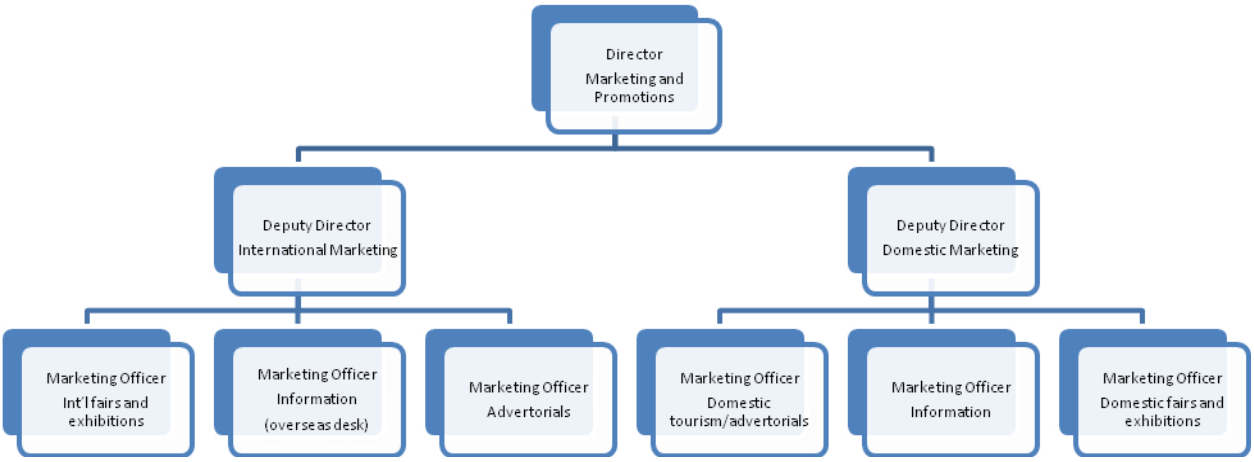
➢ *Furthermore the major stakeholders have not agreed the main brand messages and are currently not re-enforcing a consistent brand proposition in their communications.*

➢ *Limited promotional funding makes it difficult to actively pursue a strong and vibrant brand communication strategy that is endorsed by all*

2.5.3 Institutional arrangements for marketing and promoting Ghana

Figure 7 presents the proposed GTA structure for its marketing department. The former Ghana Tourist Board had 11 people working in the marketing department. The GTA is envisaging15 staff members and two reporting lines a) international marketing and b) domestic marketing at the GTA headquarters. In addition to these, a separate department for special events with 5 employees is proposed. Market research would be placed under the Statistics Department at GTA.

Figure 7: The marketing department at GTA



Source: GTA

On average, there are two persons in charge of marketing in the regional offices. An exception is Greater Accra Region, which has six people assigned to marketing. The cost/effectiveness ratio of the marketing division should be evaluated, especially in light of scarce financial resources allocated to marketing.

GTA staff participate in training course around the world funded by governments in the organising countries on a fairly regular basis. Since June 2010, GTA staff have attended the following courses:

- training in hotel management (China),
- seminar on community-based tourism (Malaysia),
- marketing services (the Netherlands),
- integrated coastal management (China),
- sustainable tourism development in African countries (Japan),
- training course for tour guides of developing countries (China),
- seminar on tourism management and development for developing countries (China),
- tourism and hospitality management (India),
- masters in tourism management (China),
- tourism development and management (Singapore),
- MSc in responsible tourism management, distance learning (UK),
- seminar on tropical agriculture for developing countries (China),
- seminar on hotel management for developing countries

Specific marketing training abroad is limited. Attachments to the national tourism offices of key source markets are therefore recommended.

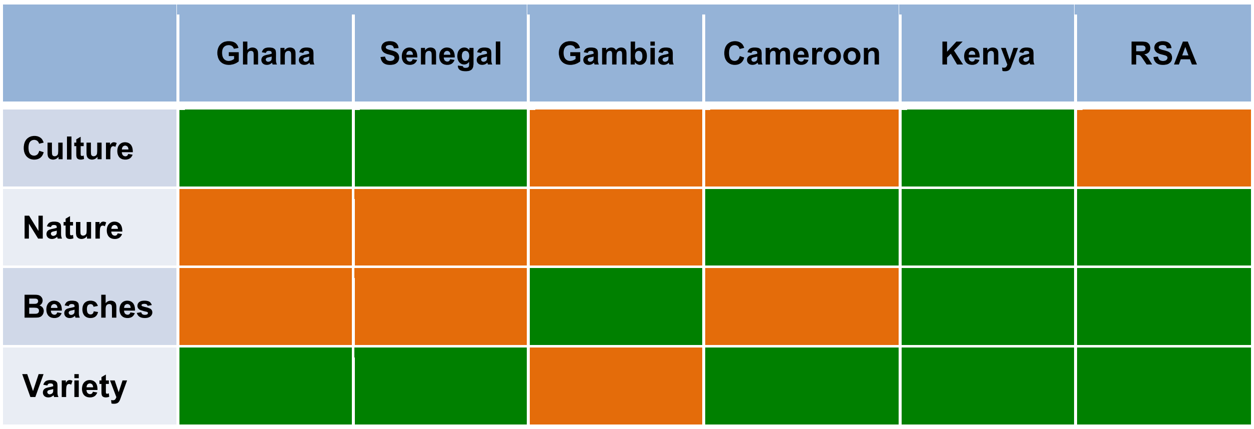
2.5.4 Comparative competitive analysis

The comparative competitive analysis is based on the UNWTO consultant team's experience in Africa, tour operator survey and stakeholder interviews conducted during the course of the project.

Most of the source markets (general public) consider Africa as a continent, not as individual and separate countries and destinations. The main motivators are the game parks (big five), cultures and rest and relaxation either at the end of the tour or as the main component of the holiday that will be then supplemented with visits to natural areas etc. As shown in Figure 8, Ghana is unable to compete mainly on tangibles. Ghana competes with cultural resources, especially intangible ones, and the wide variety of experiences it is able to offer.

Figure 8: Comparison of tangible resources

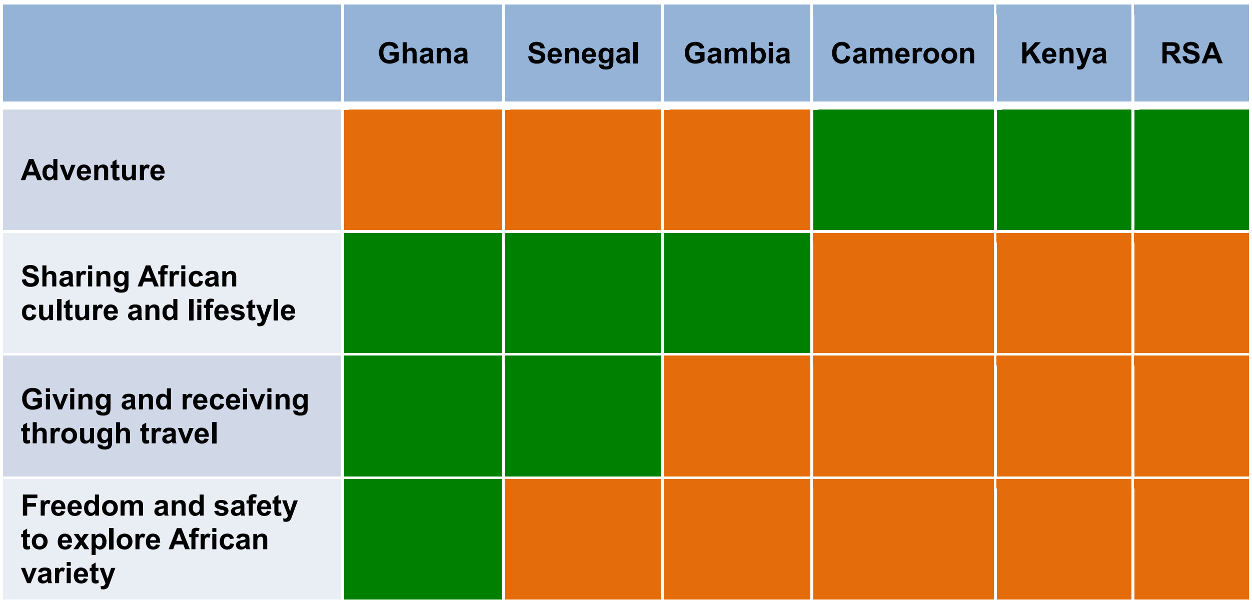
(green – strong compared to others; brown – less competitive than others)



Source: Tour operator survey October 2012

The following table highlights that Ghana's key advantage lies in emotional benefits – the sense of safety and freedom to discover and exchange at a cultural and lifestyle level. This has been supported by a) the feedback received from international tourists during the course of the project and by b) the surveyed tour operators in key international source markets.

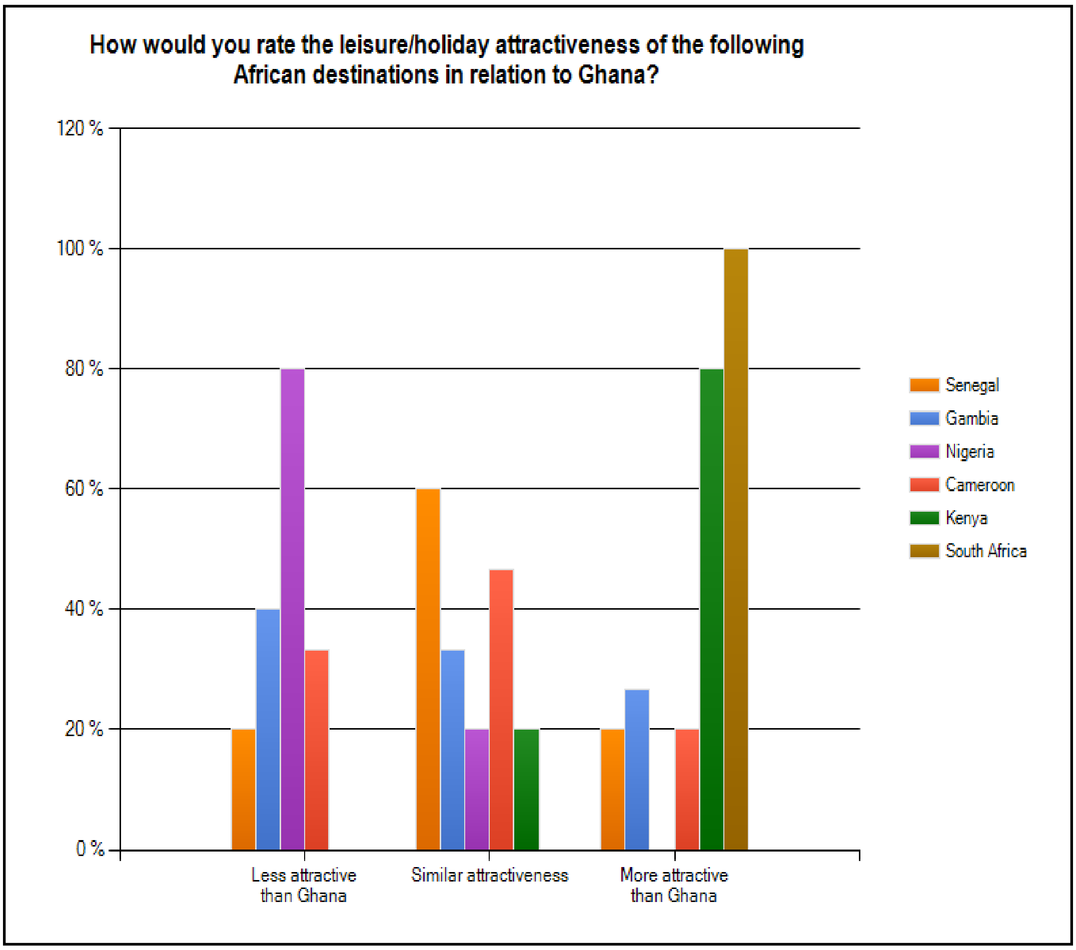
Figure 9: Comparison of emotional benefits



Source: Tour operator survey October 2012

Responses from the tour operators' survey (n=19) regarding comparative attractiveness of Ghana in relation to competitors indicate that:

Figure 10: Tour operator survey – rating attractiveness of African destinations in relation to Ghana



Source: Tour operator survey October 2012

- In the West African context Ghana is regarded as of similar attractiveness to Senegal by 60 per cent or respondents; more attractive or equally attractive than Cameroon by 80 per cent of respondents and substantially more attractive than Gambia (40%) and Nigeria (80%) of respondents

- Ghana is perceived as less attractive than Kenya by 80 per cent of respondents and less attractive than South Africa by all respondents

The Table 24 compares airfares from London to various countries in Africa. Return airfares to Ghana are comparable to the airfares to other African destinations.

Table 24: Comparison of airfares from London to Accra

AIRLINE	COUNTRY			
	GHANA (Accra)	**SOUTH AFRICA (JNB)**	**SENEGAL (Dakar)**	**KENYA (Nairobi)**
BRITISH AIRWAYS	USD 1,200	USD 1,262	USD 912	USD 1,229
KLM	USD 978	USD 875	USD 979	USD 956
EMIRATES	USD 1,146	USD 948	USD 1,645	USD 983
LUFTHANSA	USD 2,550	USD 2,643	USD 1,962	USD 1,313
ALITALIA	USD 1,132	-	USD 4,034	USD 1,206
VIRGIN ATLANTIC	USD 1,200	USD 1129	-	-

All flights were quoted for the duration of 2 weeks (i.e. 08/02/2013 to 22/02/2013)

Source: www.expedia.com, www.emirates.com, www.britishairways.com

Based on the above analysis, Ghana's competitive positioning will be formulated in the Chapter 3.

2.5.5 Turning Challenges into Opportunities

The situation analysis and comparative competitor analysis indicate that the following challenges should be turned into opportunities when developing marketing and branding strategy:

- **Lack of reliable statistical information and market research in the formulation of marketing strategy**

Current marketing strategy and actions are based on secondary information due to the lack of reliable statistical information and market research. For example, statistical information differs according to the GTA, immigration and Wildlife Division, which impedes the analysis of markets and trends, making future projections and informed decision making and planning difficult.

Exit surveys with international tourists and domestic tourism surveys as part of the Ghana Living Standards survey have not been conducted in regular intervals. For example, the last domestic tourism survey under the Ghana Living Standard Survey was conducted between September 2005 and September 2006. Therefore a) measuring and evaluating the marketing and promotional activities is inefficient and limited, b) revising the marketing strategy and activities is based on secondary information and could lead to ineffective and costly actions without desired results, and c) requesting more resources for tourism marketing purposes is not properly justified.

Regular market research and collaboration between GTA, Ministry of Tourism, National Statistical Services and Immigration is required to improve the quality and reliability of statistics is required

- **Ghana's market structure is dependent on business segment and six major international markets**

The statistics show that the business traveller segment accounts for 40 per cent of total arrivals. These are generally high value travellers who are not very price sensitive and prefer to travel and stay in comfort. They generally stay for short periods and stick to the urban business hubs.

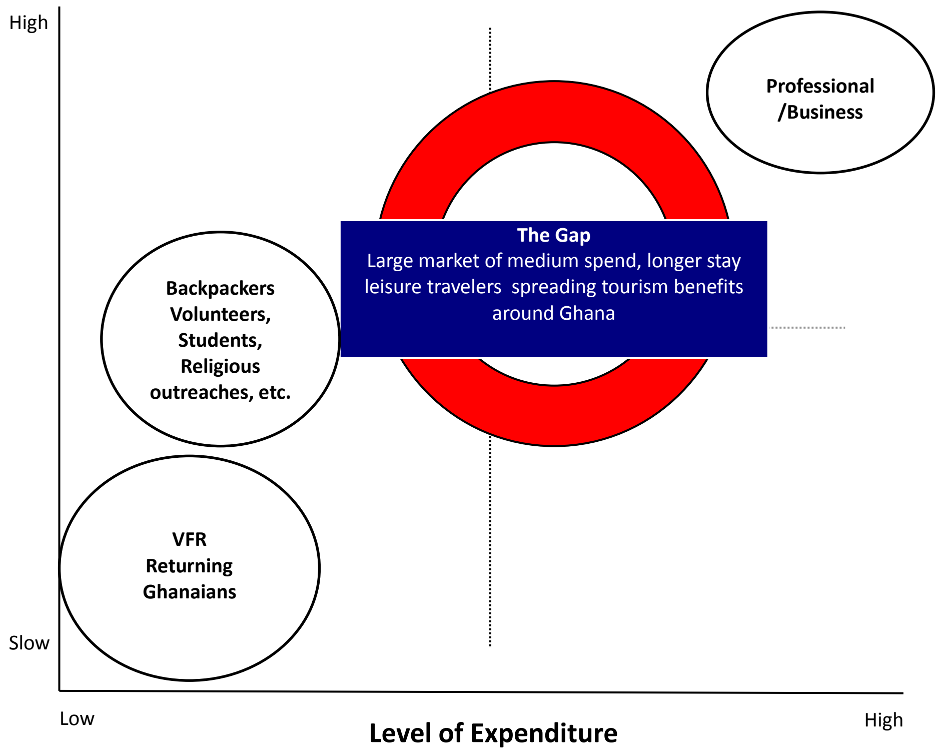
At the other end of the value spectrum, substantial numbers of students and volunteers have been visiting the country on a regular basis due to the social development needs, safe environment and the openness of local communities towards foreign collaboration and assistance. This segment of the market, also known as SAVE (scientific, academic, volunteer, educational), is prone to travelling and staying in lesser developed rural areas of the country. The segment is highly price sensitive and most facilities and services catering for them are at a budget level, run by local business people and communities.

Expatriate Ghanaians living overseas and returning to visit their friends and relatives (VFR) comprise a substantial proportion of foreign visitors. This segment has limited growth potential and tourism spending is limited because they tend to stay, eat and travel with their family and friends.

As a result, there is a market gap between the high value business segment and the lower value segments (see Figure 11). The tourism development implications are substantial and include:

- overall stunted tourism growth, with leisure tourism benefitting from a limited spectrum of potential traveller types
- skewed tourism development favouring urban areas with limited benefits flowing to outlying communities who are most in need of jobs and economic opportunities.
- Ghana's natural and cultural attractions remaining largely untapped and underdeveloped
- limited and expensive air access due to airlines catering largely for the business travel market
- a lack of affordable, quality tourist class facilities and services
- a tourism service culture confined mainly to upper end tourism facilities and services
- risky tourism sustainability, being dependent on a limited number of key business clients and determined largely by economic and political conditions and relations

Figure 11: Ghana's market structure and market gap



Source: Project Document

- **Phased diversification from business and volunteer tourism to leisure** (extended weekends for expats, families and DINKs from neighbouring countries), culture (US, Europe, domestic –education and church groups, families), soft adventure (middle to high income market segments) and special interest tourists (SITs) is recommended

- **Free Independent travellers (FIT) and small group market segments should be highlighted in the marketing activities.** These groups are mostly not dependent on fixed itineraries and therefore are more likely to change their travel plans based on information received on the spot. Therefore, collaboration, especially with accommodation establishments catering for these segments, should be commenced/intensified

- **Consolidation of current international markets is recommended in the short-term future.** It is better to allocate scarce financial resources to specific markets and use 'rifle approach' rather than 'shotgun approach' in marketing

- **Development tourism products for those already coming to Ghana is of vital importance to extend the length of stay and increase spending in the short-term.** This implies, for example, developing one-day tours in and around Accra for business travellers and MICE participants

- **Focus on domestic market is limited.**

A strong domestic market base is important for any healthy and sustainable tourism destination, as it is not so much affected by international events. Domestic tourism in Ghana is increasing as the economy of the country grows. The middle income and higher income segments are the most prospective domestic tourists. Based on information from land and real estate developers, the middle-income earners segment in Ghana is growing at 7 per cent a year while senior manager and the 'rich and famous' segments grew at 5 per cent and 4 per cent respectively. These developments are already seen in the increasing number of domestic visitors to the tourist sites and resorts. The number of Ghanaians and residents visiting major tourist sites rose 5.3 per cent in 2011, generating 763,461 visits and USD 987,000 in entrance fees (Ghana Tourism Overview 2012).

- **The importance of domestic tourism should be acknowledged among all the stakeholders**

- **Marketing and promotional activities targeting the domestic market segments should be intensified**

- **Limited marketing budget and capacity for promoting Ghana as a favoured destination brand**

The current marketing budget for promoting Ghana as a tourist destination is modest. The one per cent levy is envisaged to support marketing and promotional activities in the future. However, efficient and targeted use of these funds is required in order to win the support of the private sector and to intensify public-private partnerships in marketing (e.g. organising fam tours; attending fairs).

- **The collection of the 1% tourism levy should alleviate current funding shortages for marketing; provided that an adequate proportion of such funds are applied for marketing and brand communication.** Public-private partnership should highlight the need to increase the marketing and promotional budgets. The private sector should be part of the decision making process on marketing and promotion.

- **The marketing budget for Ghana should be increased in order to undertake the agreed activities and achieve the set targets.** Request for marketing budget should be justified with up-to-date statistical information and market research evaluating the marketing and promotional activities.

- **The Ghana Tourism Authority should be the custodian of the tourism brand on behalf of public and private sectors and should be adequately capacitated to fulfil this mandate.** Adequate financial and human capacity (e.g. appointment of a strategic brand manager and having a dedicated brand management budget line) should be provided to GTA. The brand manager should work closely with all divisions of the GTA, the Ministry and private institutions to ensure a holistic brand roll out

- **Value for money is weak**

Ghana is considered to be an expensive destination for leisure tourists (air fare, visa, hotel accommodation). With the current pricing structure only higher middle-income and high-income market segments can be targeted. The interviewed stakeholders also found that the experiences are unorganised and not well packaged, which also affect the quality of the experience and low value for money.

- **Packaging the experiences is required to improve the tourist experience, to attract repeat visits, and to create positive word-of-mouth marketing**

- **Joint efforts are needed to solve the pricing structure**

- **Ghana does not have a clear and implementable brand strategy and guardianship**

The lack of clear brand strategy and guardianship has created a confused image among prospective customers. Thus there is a danger that Ghana is dropped from the prospective customers' shopping list.

- **Devising an inspirational tourism destination brand identity that excites potential travellers, trade partners and local product owners should be a priority.** A creative, emotionally attractive and visually stimulating tourism brand identity could well solicit the support of a wide range of direct and indirect tourism participants. Such common identity could be the catalyst for more effective and efficient tourism communications and could enhance Ghana's visibility as a prospective tourism destination

- **Brand communication is currently fragmented**

The Ghana Tourism Authority (GTA), Ministry of Tourism, various Destination Management organisations (DMOs) and private sector institutions like Ghana Tourism Operators Federation (GHATOF), Tour Operators Association of Ghana (TOUGHA) and other industry bodies do not use a common brand identity and language and there is no accepted brand manual to guide the application of a tourism marketing brand by all institutions and parties

- **The brand strategy should be agreed among public and private stakeholders and all tourism stakeholders (institutions, companies and individuals) should actively communicate and display a common brand identity and imagery**, either as their main marketing brand or as complimentary to their brands. Tourism stakeholders (both public and private sector institutions and businesses) have indicated their willingness and keen interest in embracing and applying a common brand identity and messaging. Mobilising the major tourism operators and institutions to adopt and apply a common visual identity and to communicate consistent messages could set in motion an expanding brand communication momentum

- **The tourism brand identity should compliment the nation brand and there should be close cooperation between Brand Ghana and the tourism authorities.** Brand Ghana is gearing up for the implementation of a national branding initiative that will involve the participation of all economic sectors, including tourism and is meant to infuse a national brand identity across Ghanaian society. It will be very important for the tourism brand to compliment and piggy-back on the Brand Ghana initiative to ensure maximum impact

- **A public-private marketing forum should be established** to facilitate joint decision making, agreement of joint marketing programmes and ensuring that public and private tourism stakeholders promote a common brand identity and messages

2.6 Review of tourism resources and assets

This section is, in part, a review and update of the range and extent of tourism resources that were comprehensively identified in the 1996-2010 Plan. In that report the resources were organised into four sectors, namely: 1) natural attractions; 2) historical heritage; 3) cultural heritage; and 4) other types of attractions. They are organised in the same structure here. A summary of the findings of the review and update is set out in this chapter, although the full list and review of resources is in Appendices 2.6.1 and 2.6.2.

What is also included in this chapter is the identification of issues of concern in relation to the quality, extent and management of these resources. Given the large variety of tourism resources in Ghana, every effort was made to visit as many resources and attractions as possible, which reflect a good collection of the diversity and strength of Ghana's tourism product. Field trips have been made to some of the key sites and areas that are considered important for possible inclusion in the five-year action plan. Many of the issues identified are relevant to the majority or all of the sites within a sector - and some apply to the tourism resources generally, in all sectors. A summary of the findings of the field trips, related to specific tourism resources and sites within Ghana has been incorporated into a series of project profiles, which include a range of issues for each site. The project profiles are included, in full in Appendix 5.3.1.

2.6.1 Natural attractions

Natural attractions in Ghana include national parks, resource reserves, wildlife sanctuaries, and Ramsar sites. In addition to these designated natural areas there are good beaches, lakes and rivers, waterfalls and general scenic beauty. The climate is conducive to outdoor activity and complements nature and beach related tourism. Designated national parks, reserves and sanctuaries are under the administration of the Wildlife Division.

There are no natural attraction sites in Ghana that are inscribed on the UNESCO World Heritage Site list, although three sites were submitted, in 2000, onto the UNESCO tentative list:

- Kakum National Park
- Mole National Park
- Nzulezu Stilt Settlement

The tentative list is for properties and areas that are thought suitable to be considered for a full UNESCO World Heritage Site inscription. It is recommended that these become fully inscribed.

a. Overview of changes / actions since the Development Plan 1996-2010

The full list and schedule of change/actions to the natural attraction sites is in Appendix 2.6.1.

- **National parks**

There are seven national parks in Ghana of which Kakum and Mole are the most developed for tourism, as they were at the time of the Development Plan 1996 – 2010. These two sites are the only national parks, which have had additional visitor facilities added since 1996. The canopy walkway at Kakum has become one of the best-known attractions in Ghana (see Photo 2.6.1). Other national park sites have been augmented with staff facilities to improve the effectiveness of their conservation and environmental protection.

- **Resource reserves**

There are five resource reserves in Ghana of which only Shai Hills has any specific visitor facilities. There has been little change since 1996 although there are funded proposals to incorporate facilities at Gbele.

- **Wildlife sanctuaries**

Currently only one site has been developed with specific tourism facilities, at Boabeng-Fiema, where a visitor facility has now been built and is managed by the community. The site is managed as a joint partnership between the Wildlife Division and Nature Conservation and Resource Centre (NCRC).

Photo 2.6.1: The aerial walkway at Kakum National Park

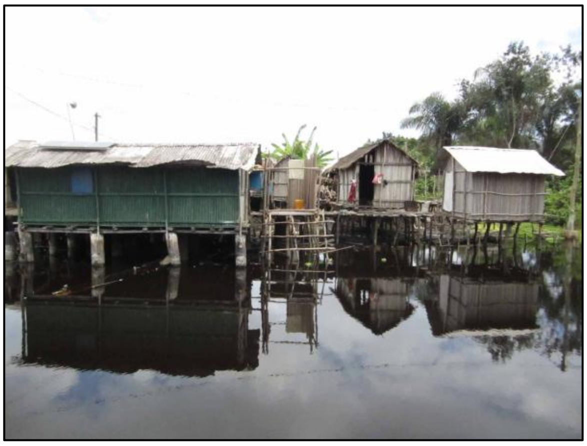


Photo 2.6.2: Nzulezu Stilt Settlement at Amanzuri Wetlands

- **Coastal wetland reserves (Ramsar sites)**

Wildlife Division do not own the land within Ramsar sites (with the exception of Sakumo). The Ramsar status imposes less environmental constraints compared to the national parks, resource reserves and wildlife sanctuaries. Landowners have more freedom and local control and although the Wildlife Division is a statutory consultee to planning applications within the sites, their recommendations are not always followed and inappropriate development takes place. The District Assemblies are not always following Wildlife Division advice and there are local political and social pressures to allow development in certain places despite the loss of valuable natural and ecological resources. The Densu Delta, West of Accra, is particularly under pressure from intrusive residential development. Similar problems are beginning to occur around Ada in the Songor site therefore creating conflicts between ecological sites and urban development.

Within the Ramsar sites as a whole, where possible, Wildlife Division liaises with landowners to try and encourage tourism initiatives in a responsible and sensitive manner. The Nzulezu Stilt Settlement at the Amanzuri Wetlands near Beyin in Western Region is a much-visited attraction organised with the local community by the Ghana Wildlife Society (see Photo 2.6.2). In Ada, the Wildlife Division is working with the local community and the Ministry of

Tourism to develop tourism activities such as boat tours at the estuary of the Volta River (see Photo 2.6.3).

Some wildlife sanctuary areas are managed by local communities such as Agumatsa/ Wli Falls and Boabeng-Fiema monkey sanctuary.

Management plans have been prepared for the protected sites. The Wildlife Division is actively seeking opportunities for the involvement of the private sector in developing tourism visitor facilities within those attraction sites that are suitable for visitors/tourism. Details of these initiatives for each of the protected sites, where applicable are shown in 2.6.1.

- **Areas to be improved and issues of concern**

- Whilst it is to be encouraged that the Wildlife Division is actively participating in the development of tourism resources within Ghana, its separation, administratively, (as part of the Ministry of Forestry), from the Ministry of Tourism has the potential to lead to a conflict of interest and/or development that does not conform with a wider tourism strategy. However, the Tourism Act 817 mandates the Minister of Tourism to designate tourism sites but its implementation require a collaborative effort amongst relevant agencies.

- Although the majority of the Wildlife Division plans remain undeveloped at present, there is an emerging pattern of ideas and aspirations that collectively raise some concerns. These involve the stated desire to, for example:

  - Incorporate zip lines at Anakasa and Shai Hills Resource Reserves;
  - Introduce new species into Shai Hills Resource Reserve;
  - Allow up to 200 double rooms, plus conference facilities, developed by the private sector, in the heart of the Shai Hills Resource Reserve;

- These initiatives have the potential to dilute the inherent and particular character of the individual protected areas and the sustainability of the biodiversity, rather than retain, reinforce and strengthen it. If the collective quality of Ghana's tourism product is built on the basis of the diversity of its facilities and assets, then it would seem counter-productive to take measures that may lead to a standardisation or convergence of the particular character of each separate area.

Photo 2.6.3: The Ramsar site at Ada with its boat tours is a popular destination for both domestic and international tourist visits

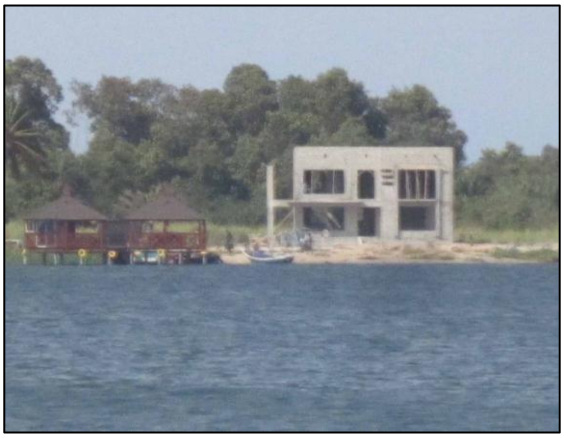


Photo 2.6.4: New, insensitive development is taking place within the Ramsar site at Ada, which, if uncontrolled, will significantly damage the attractiveness of the area for tourism

- The intrusions into the Ramsar sites as depicted in Photo 2.6.4, raise major issues in relation to the approach and effectiveness of the District Assemblies in enforcing the protected and sensitive status of these environmentally important sites.

- The Wildlife Division has a Design Standards document, which is to be commended, and which is intended to guide potential developers as to an appropriate form, scale and character of development. However, it has a general approach and, as such, it is important that it is supported by site-specific recommendations and a robust and comprehensive brief for development within each site.

b. Other natural attraction sites

Although time did not allow for all these sites to be visited during the study, some specific reviews or recommendations are made which can be adopted and adapted to other sites. In the case of beaches and Lake Volta, which are considered significant assets and resource in Ghana, the following issues are identified below.

- **Beaches**

Ghana's south coast is blessed with many long and wide sandy beaches, mostly with a coconut palm forest fringe and, at certain locations forested rocky cliffs. Even the more popular beaches are not crowded and it is very easy for visitors to be completely isolated. Some beaches, for example in the Western Region, have long stretches of beach, which are difficult to access and are therefore completely virgin and there is great potential for development in the future. Potential activities include swimming, surfing, diving, snorkelling, canoeing, boat rides, sport fishing, sunbathing, beach sports, whale watching, turtle conservation and watching, and visiting fishing villages and surrounding attractions

➢ **Areas to be improved and issues of concern**

Fundamentally, to be successful, a beach not only has to be clean, wide, and sandy, with safe sea and currents, it needs to be aesthetically attractive as well. Despite existing planning rules such as Environmental Impact Assessments these are sometimes not enforced resulting in undesirable structures built on the beach as shown in Photo 2.6.5. Specific areas to be improved and issues of concern include he following:

- Land disputes have led to conflicts and stopped tourism-related development projects. There is also some land speculation with firms and individuals buying land from a chief and holding onto to it in anticipation of future price rises leading to stagnation of development
- Development control by District Assemblies is not always effective in preventing inappropriate development in respect of location, siting, scale, local content, massing, design details and materials. Insensitive development can have a significant negative impact on the wider area
- Protection of marine wildlife (sea turtles for example) needs to be ensured, as it is an important tourism asset as well as an environmental imperative
- Whilst there are laws prohibiting sand winning/mining, these are often flaunted as sand is easily available on beaches. The extraction is usually permitted by the local chiefs and this has led to disputes with beach resort managers and owners
- Cleanliness of beaches and the sea (for example garbage collections) needs to be coordinated at a local level. This takes place on some areas, but not all as depicted in Photo 2.6.6; and
- The Atlantic coast is notorious for dangerous currents and undertow and some beaches along the coast are potentially dangerous. Suitable warnings and information need to be given and lifeguards and/or safety features adopted at important beach resort areas.

Photo 2.6.5: Inappropriate development on Busua Beach, such as that which stands forward of the natural tree line along the beach and/or is out of scale with the character of the area, has a detrimental impact on the quality of the beach environment

Photo 2.6.6: Uncollected garbage has a very negative impact on the overall setting and quality of the beach environment

- **Lakes and rivers**

Lake Volta: Although Volta Lake is man-made, nearly 50 years after it was created it has become a very natural feature and is enhanced by being located within a setting of attractive hills and mountains. The current and future situation regarding transportation on the lake has been described in detail in section 2.4.

Recreational use of the lake is largely limited to the southern end, around Akosombo, including:

- The Dodi Princess, which operated a popular day cruise service from Akosombo to Dodi Island with up to 350 passengers, but was damaged by fire in May 2012. Services are due to resume in 2013.
- A 20-seater yacht owned by Volta Lake Transport Company, although they are actively seeking to acquire more boats to expand their leisure activities;
- Organised boat trips from Akosombo to a dam further downstream at Kpong;
- Hotel operators in the area operate their own leisure and recreational trips; and
- There are also, seemingly, a large number of private unregulated boat operators.

In addition to recreational activities on the lake, there are a range of potential projects being pursued by VLTC, including:

- The provision of eco-lodges in Akosombo and on Dodi Island
- Partnering with private investors to expand the existing hotel's accommodation and facilities
- Promote a new golf course at Akuse, near Akosombo; and
- Creating a game reserve within a designated fenced area on Dodi Island

The potential for tourism development in other parts of Lake Volta is currently limited by the lack of access, although it offers great scope for a wide range of activities and facilities, in a very attractive setting. With the establishment of tourist-orientated transport, communities around the fringes of the lake will be able to take advantage of these opportunities to engage in community-based tourism initiatives and the improved access will offer opportunities to develop resorts at areas of natural beauty. A planned new docking facility on the edge of Digya National Park will offer access that has previously been almost impossible as well as providing better protection of wildlife in the area which has suffered from poaching

- **Areas to be improved and issues of concern**

- Problems with transport and safety within the lake have been noted in section 2.4
- Improved transport is required to unlock the great potential for tourism-related development along the length of Lake Volta, although current plans by VRA / VLTC should greatly improve this issue
- The extent and nature of the unregulated sector needs to be established and any problems and issues identified will need to be dealt with by the VRA
- There are conflicting reports of the extent of water-borne diseases in the lake such as bilharzia and guinea worm. Methods need to be established to maintain water quality, and health for both visitors and residents around the lake

Further detail on Lake Volta issues is given in the project profile in Section 5.3.1 of this document.

In addition to the specific natural attractions and sites outlined above, there are a large number of other areas, which have potential as tourism resources. Specific natural attractions include:

- waterfalls
- crocodile ponds
- botanical gardens

- zoos
- gold mines and mining areas
- areas of scenic beauty
- agricultural sites such as cocoa farms, palm oil processing, coconut farms and rubber plantations
- gin distilleries.

Some specific sites in these categories, where they have been visited as part of the field trips, are discussed in the project profiles in Section 5.3.1. However, it is not intended to provide a full schedule of resources in this document. Rather, the key principles and issues raised in this section of the document are common to many tourist sites in Ghana.

2.6.2 Historical heritage

There are a large number of historic and archaeological sites in Ghana, including the forts and castles along the southern coast, traditional buildings, mosques, churches and major shrines.

There are two ‘properties’ inscribed on the UNESCO World Heritage Site List, although each of these listings comprises multiple buildings. These are:

1) Forts and Castles, Volta, Greater Accra, Central and Western Regions, (inscribed in 1979); and
2) Asante Traditional Buildings, (inscribed in 1980)

There are also additional properties submitted, in 2000, onto the UNESCO tentative list:

- Navarongo Catholic Church and
- Tenzug-Tallensi settlements

The tentative list is for properties that are thought suitable to be considered for a full UNESCO World Heritage Site inscription. The Tenzug-Tallensi settlements site is currently being put forward by GMMB to UNESCO for consideration as a fully inscribed World Heritage Site.

Photo 2.6.7: Elmina Castle

Photo 2.6.8: The Besease Traditional Shrine

- **Forts and Castles**

These fortified trading posts, founded between 1482 and 1786, and spanning a distance of approximately 540 km along the coast of Ghana between Aflao in the east and Half Assini in the west, were links in the trading routes established by various European countries which colonised the then Gold Coast. The castles and forts were built and occupied at different times by traders from Portugal, Spain, Denmark, Sweden, Holland, Germany and Britain. They served the gold trade of European chartered companies. Latterly they played a significant part in the developing slave trade, and therefore in the history of the Americas, and, subsequently, in the 19th century, in the suppression of that trade.

There are 28 separate properties on the list, including: three castles (see Photo 2.6.7 Elmina Castle); fifteen forts; four forts partially in ruins; four ruins with visible structures; and two sites with traces of former fortifications. These are listed in Appendix 2.6.2. In addition to these properties there are a further four forts listed in the National Listing of the GMMB.

- **Traditional Buildings**

Traditional building and traditional architectural style represent the way of life and history of the people who settled and still live there. Notable are the Asante buildings in Kumasi and the styles found in the North of the country.

Near Kumasi, a group of traditional buildings are the last remaining testimony of the great Asante civilization, which reached its peak in the 18th century. The buildings include ten shrines/fetish houses such as the Besease shrine as shown in Photo 2.6.8. Arranged around courtyards, the buildings are constructed of timber, bamboo and mud plaster and originally had thatched roofs. The unique decorative bas-reliefs that adorn the walls are bold and depict a wide variety of motifs. Common forms include spiral and arabesque details with representations of animals, birds and plants, linked to traditional adinkra symbols. As with other traditional art forms of the Asante, these designs are not merely ornamental, they also have symbolic meanings, associated with the ideas and beliefs of the Asante people, and have been handed down from generation to generation. Although many of these World Heritage Site buildings are not in active use, each has a caretaker on site.

The architectural styles of the North are very distinctive. Traditional houses are round huts with conical thatched roofs are typical around Tamale. They are often constructed in a configuration forming a compound.

The Kassena houses in the Upper East Region bordering Burkina Faso and earth building made of a mixture of mud, clay, and sand in the form of either damp balls or semi-dry block. The walls are decorated with distinctive designs, sculpted in the mud and often painted with patterns. They usually have a flat roof or a conical grass roof. Many have extensions, grass-roofed shelters outside the compound walls, which are used for social activities, and meet relatives and friends.

a. Overview of changes / actions since the 1996-2010 Plan

In terms of the specific recommendations for the proposed physical and management changes to the historic heritage, there has been relatively little action with direct impact on tourism since the production of the report in 1996. For forts and castles, nine sites were proposed for a site museum. Two of these proposals have been carried out, at Usher Fort (not fully developed) and Fort Appolonia. Four forts were proposed for visitor facilities, none of which have been carried out. A further eight fort and castle sites were proposed to be made open to visitors, although only one of these has actually opened. However, the three museums that were already developed within Cape Coast Castle, Elmina Castle and the

British Fort, Kumasi are still in operation. Appendix 2.6.2 shows developments since 1996.

- **Areas to be improved and issues of concern**

- The GMMB has very limited funds to carry out their function to conserve and protect Ghana's heritage assets. There are no management plans in place for any of the designated World Heritage Sites and no resources currently available or identified to carry them out. The income currently derived from the sites is insufficient to cover these costs.

- The extent of their control, in terms of public land ownership, is, in many cases, tightly drawn around the perimeter of the heritage property. Therefore, GMMB do not have direct control over potential development in close proximity to their heritage sites. Planning permission is in the hands of the District Assemblies, and although the GMMB may be consulted or comment on the suitability of a particular planning proposal, it is the Assembly who have the final say in these matters. This has led to encroachment in areas that should certainly be considered as part of the critical setting and context for the heritage property. Land use planning is not applied or enforced around these monuments and incompatible structures are built causing visual pollution. For instance a mobile phone mast has been built within the compound of Fort Gross Friedrichsburg at Princess Town (see Photo 2.6.9), with negative impacts on the cultural and historical character of the site.

- One site, Metal Cross Fort, Dixcove, has been leased to a private owner. Although the GMMB maintains controls over development within the designated boundary, new development is currently taking place in close proximity to the Fort. This is, in itself, of concern, as is the precedent of leasing important heritage assets to a private owner, in light of the limited degree of planning control that the GMMB has over the District Assemblies. A strategy to offer

- The GMMB come under the administration of the Ministry of Chieftaincy and Culture and, in practice, there are limited formal linkages with the Ministry of Tourism and/or the Ghana Tourism Authority (GTA). This lack of co-ordination reflects in, for example, the lack of any specific or consistent signage strategy, which could promote the sites that are available to the public.

- Interpretation at the sites is weak, where it exists at all. Although guides at the sites may be very knowledgeable and be able to provide information, this is only one of the methods, which should be available for visitors to learn more about the site and its history.

To improve the assets for tourism GMMB should be encouraged to seek funding from the Tourism Development Fund and from other donor agencies.

Several other heritage-related resources are worthy of mention here:

Historic urban districts remain in several areas including parts of Accra, (Jamestown for example), as well as in Elmina, Cape Coast, Kumasi and Sekondi. These areas are deteriorating due to lack of maintenance and investment, although some individual buildings within Cape Coast and Elmina, for example, have been restored. Access to tourist sites of tourist interest is sometimes blocked by ad-hoc development and urban encroachment (see Photo2.6.10). Urban areas that retain a good proportion of original buildings and street patterns can provide a fascinating context to understand the past that individual buildings on their own are unable to do. These areas should be preserved and consideration given to establishing some form of conservation area protection and control over development with active participation of all stakeholders.

Archaeological sites exist in Ghana related to the earlier history of Ghana. In some cases, their importance may only be of a specialist nature for tourism, however, they are an important asset for Ghana's heritage and should be protected from damage. If funds are not available for archaeological investigation, the sites should be preserved by the Ministry of Chieftaincy and Culture for the future, to avoid any deterioration.

The Slave Route Project was initiated by, amongst others, UNESCO, WTO and the Government of Ghana to *"rehabilitate, restore and promote the tangible and intangible heritage handed down by the slave trade for the purposes of cultural tourism…".* Specific sites within Ghana have a special role to play on this project, including Salaga, Yendi, Assin Manso, Nalerigu and Gwollu, as well as the castles and forts that are the most apparent physical symbol of the slave route. The project and the sites to which it refers, are of general interest but particularly so for persons of African descent in America and beyond.

Photo 2.6.9: Infrastructure mast located within a UNESCO designated World Heritage Site - Fort Gross Friedrichsburg at Princess Town

Photo 2.6.10: The principal pedestrian route to Fort St Jago, a UNESCO World Heritage Site and one of the most important heritage assets in the country, blocked by ad-hoc development and encroachment

- **Areas to be improved and issues of concern**

- Preservation of historic buildings outside the remit of the GMMB, particularly where they form unified urban districts with heritage significance.
- Protection of archaeological sites to ensure they are held in a stable condition for potential future investigation.

2.6.3 Intangible cultural attractions

The culture of Ghana is a very important part of its appeal and character as a tourism destination. Particularly so, as it is so relevant to the everyday lives of the people of Ghana and is accessible to visitors, by virtue of the openness with which Ghana shares its cultural assets and heritage. Perhaps the most distinctive and attractive aspect of this is the general friendliness and warmth that is given to tourist visitors within Ghana. The range of culture represented in Ghana includes: festivals and funerals; traditional crafts and contemporary arts; music and dance; as well as the core cultural beliefs and practices, which manifest themselves in different ways in the different regions of Ghana.

It is not possible, or realistic, to give an update on changes to these attractions since the 1996 report as these are, generally, not tangible assets and resources, but aspects of Ghana life that permeate every part of the country and every tourist destination, in one way or another. Rather, it can be observed, that the attractions listed in the 1996 report, and summarised here, are no less relevant today than they were in 1996. They should be nurtured and remain as a crucial part of the cultural appeal of Ghana as a tourist destination.

2.6.4 Other attractions

Other attractions not covered in the categories above include museums, cultural centres, churches and mosques, theatres and libraries, sports and recreation, gold and diamond mines, as well as special facilities such as Akosombo dam, which has a visitor centre. These types of facility are discussed later in this document where they play a specific role in the projects recommended for development within this plan.

- **Accra**

It is not intended to give a full appraisal of Accra and its relationship with the tourism sector. However, it needs to be acknowledged that as the capital city of Ghana and the principal arrival point into Ghana for international visitors, it inevitably plays a role in the experience of the international visitor as well as being a focus for expats within Ghana, and an important population centre, and potential attraction, for domestic tourism.

Accra is by far the most visited destination in Ghana as the main business centre and the seat of government but also as the principal gateway to the country. Most trips start and end in Accra for international travellers. Tourism has not influenced the development of the city, which has grown organically as business has increased and expanded into different suburbs in recent years. Rather the city has spread where offices have been built and hotels have been built in those areas to cater for the business market. Accra has nearly 5,000 rooms, 45 per cent of total rooms in star-rated hotels in Ghana. It is where the only five-star hotel in the country is located, and 4 of the 5 four-star hotels. Several new high-end hotels are currently in construction including the Kempinski and Marriot chains.

Therefore tourism and leisure in Accra is determined by the business market that it serves as well as the large expat community living in the city and the growing Ghanaian middle class. As a result several high-end restaurants have opened to cater for these markets. The city has no recognised centre that could be developed as a focal point for tourism. The areas around Osu and around Airport West are the liveliest and are most likely to attract tourists and residents in the evenings.

Accra is located by the sea and has a long beach. Unfortunately the coastal fringe of the city is taken over by government offices, Independence Square and President Nkrumah’s Mausoleum. The beach is neglected, poorly maintained and does not offer any opportunities for tourism in its present state. There have been several plans drawn up to develop Accra’s seafront over the years but conflicting ideas and interests have meant that these have not been realised. The most important tourism assets in Accra are the forts. Osu Castle (also known as Christiansburg Castle) is currently the office of the President and it is completely closed off to the public. It is possible however that the new President will move to a purposely-built presidential palace when he takes office. The Castle is seeped in history and would be the most important tourist attraction in Accra if it were open to visitors. Fort St

James and Usher Fort are currently not used as prisons anymore and need to be developed as museums. At the moment they cannot be visited because they are not in an appropriate state. Fort Usher, which was once also a prison, is now a museum.

A tourism development strategy needs to be prepared for Accra. However within the scope of this update of the National Plan it not possible to formulate it without understanding the local political environment in force in the city, the interest groups with influence and the plans that are already on the table. However, an in-depth study aimed at improving the tourism appeal of the city is recommended. Donor funding should be sought and strong political commitment is required to transform the city into a leisure tourism destination.

2.6.5 Tourist reception facilities / tourist information centres

Tourist reception facilities / tourist information centres are located in sites within each of the categories outlined above. The Ministry of Tourism has made a significant effort in recent years, to build new tourist facilities with the stated aim to '*properly plan and guide the development of the tourist attractions of the country to achieve poverty reduction and the conservation of the country's cultural and environmental heritage'.*[13]

These can play an important role in providing a focus for information and orientation; in offering services and resources unavailable elsewhere, such as toilets, restaurant etc.; and in providing more detailed information such as a museum or formal display area.

Some of these facilities have been visited during the field trips, not all of which were instigated by the Ministry of Tourism. These include those at Kakum National Park; Mole National Park, Shai Hills Resource Reserve, Wli Falls, Bonwire, Ntonso, Besease shrine, Lake Bosumtwi and Larabanga. Specific comments on most of these sites are included within the Project profiles in Section 5.3.1. However, there are some general comments and observations that are summarised here.

- Many of the facilities are located in areas that made it extremely difficult, if not impossible, for the facility to achieve its fundamental aims and objectives, i.e. too far away from the tourist site(s) to which it relates
- Many facilities are not providing the range of facilities that were originally intended and/or which support and promote the tourist sites which they relate to; and
- The design and concept for many of the facilities is not sympathetic with the character of the area in which it was built and/or the tourist product being promoted, i.e. kente cloth, adinkra symbols, a village setting or a natural attraction

Perhaps because of these issues, many of the facilities were under-utilised, closed, poorly maintained and unkempt. The communities were not benefitting from their presence and nor were tourist visitors. This is the result of:

- lack of interest by Municipal and District Assemblies involvement in tourism and management of the facilities
- private sector perception of not able to generate sufficient profit at a fast enough rate from the facilities
- lack of promotion of the facilities and patronage by tour operators
- land disputes due to ownership challenges
- for some of these, land use plan were prepared but not implemented by GTA and

[13] Ministry of Tourism 2003 *Developing and managing receptive facilities at tourist attraction sites – project formulation document* Ministry of Tourism, Government of Ghana

GTDC

These observations are backed up by a Ministry of Tourism project audit, of March 2012[14], which catalogues a similar list of failings.

Resolving these issues is not simple, particularly if the facility has been built in an inappropriate location. However, specific guidance is included in section 5.3 below, to help direct decisions on the land use planning and design of future facilities and also to inform the processes of monitoring and evaluating the success, or otherwise, of existing facilities.

The Ghana Tourism Development Corporation currently manages three centres: Assin Manso receptive facility, Assin Praso facility (both sites are historically related to the slave trade) and the Oda big tree. It used to run several others but they were abandoned after disputes of land ownership, misappropriation of funds and interference from District Assemblies made these impossible to manage.

2.6.6 Summary of changes / actions since the 1996-2010 Plan

What is apparent from the review of changes/actions since 1996 is that whilst significant progress and development has taken place, the scale and scope of tourist development has fallen significantly short of the proposals indicated in the plan. Given the state of tourism resources in 1996, and the comprehensive nature of the proposals made in the plan, this is not altogether surprising. The 1996 report did not set priorities or a specific phased approach to the implementation of the proposals made, and was, in effect, an idealistic vision of what would be desirable for each individual resource and asset within Ghana.

The analysis of this review should not, therefore, be too pessimistic about the extent of actual changes and actions that have taken place, but to be realistic about the likely pace and extent of changes that are sustainable over the period of the revised plan for 2013-2028. This needs to be reflected in the structure plan, in a phased and targeted approach to development.

[14] Ministry of Tourism, Project Audit, Internal Audit Report no 1 2012, March 2012

2.7 Institutional framework

To realise its full productive potential, tourism must be organised and managed sustainably. This involves both the public sector and the private sector working together. Tourism is multi-dimensional and multi-sectoral in the sense that it is dependent on several sectors and requires coordination between many organisations to function effectively. This section reviews the structure and responsibilities of public tourism administration, and discusses the role of private sector tourism associations, the inter-ministerial committee and Public Private Partnerships.

2.7.1 Public sector and para-statal institutions

Several public sector institutions represent tourism in different capacities:

- The Ministry of Tourism (MOT)
- The Ghana Tourism Authority (GTA)
- Ghana Tourism Development Corporation (GTDC)
- Hotel and Catering Tourism Training Institute (HOTCATT)
- Metropolitan, Municipal and District Assemblies (MMDA)

A detailed analysis of these different layers of tourism administration is provided in a recent comprehensive study entitled 'Retooling and Modernizing the Ministry of Tourism into an Effective and Proactive Policy Instrument of State'[15] carried out by a consulting firm (Plan Consult) and published in June 2011. This document provides the background to the analysis in this section and most of the recommendations made in the study are endorsed in this update to the National Tourism Plan (see Chapter 5). It will be referred herewith in this document as the 'Retooling the Ministry report'.

a. The Ministry of Tourism

The Ministry of Tourism was created in 1993 and has gone through a number of transformations over the years. The vision of the Ministry is:

> *'to realise the sector's full potential in contributing to economic wealth, poverty reduction, environmental conservation, national cohesion, and achieve greater GDP growth'*

The Minister of Tourism, assisted by a Deputy Minister, heads the current structure. Six directorates carry out administration, each led by a director under the overall responsibility of a Chief Director. The Ministry is structured along the lines of other Ministries in Ghana with four Directorates common to all Ministries: Policy Planning Monitoring and Evaluation (PPME), Human Resources Development and Management, Finance and General Administration, and Research, Statistics and Information (RSI). The Ministry of Tourism has two additional Directorates: Procurement and Supplies and the Projects Unit. The Ministry has 112 staff, the majority junior officers.

The principle functions of the Ministry are:

- policy formulation

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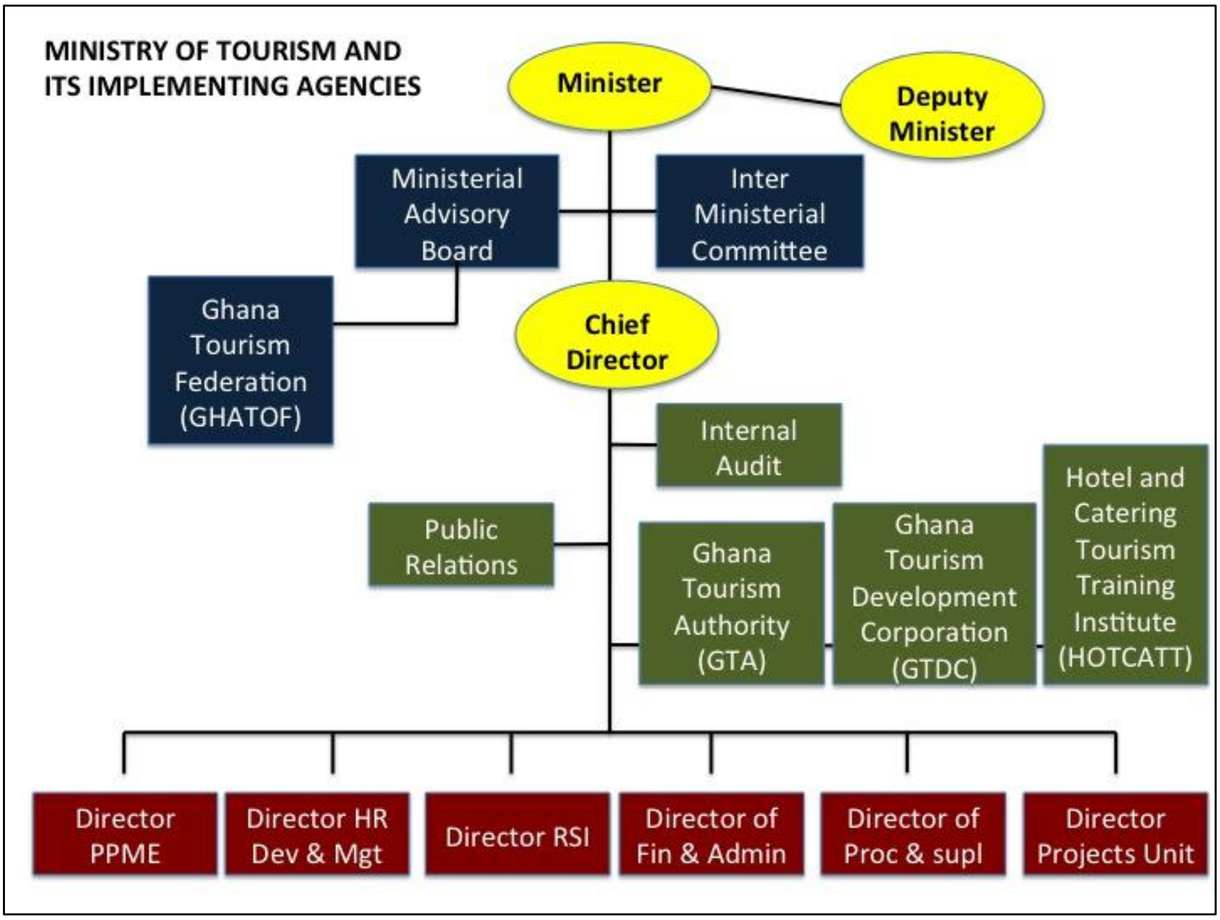
[15] Plan Consult, Retooling and Modernising the Ministry of Tourism into an Effective and Proactive Policy, Instrument of State', Report for the Public Sector Reform Secretariat, June 2011

- planning and development
- promulgation of legislation and regulations
- encouraging investment
- developing human resources for the sector
- intergovernmental and industry relations
- international cooperation and relations

Figure 12 presents the current structure of the Ministry.

Figure 12: Organigram of the Ministry of Tourism and links to related agencies



Source: Ministry of Tourism and Plan Consult

b. The Ghana Tourism Authority

The Ghana Tourism Authority is the implementation and advisory arm of the Ministry. It was formed by the Tourism Act 817 in 2011 and replaces the Ghana Tourist Board. Its functions as described on its website and in its Annual Report are:

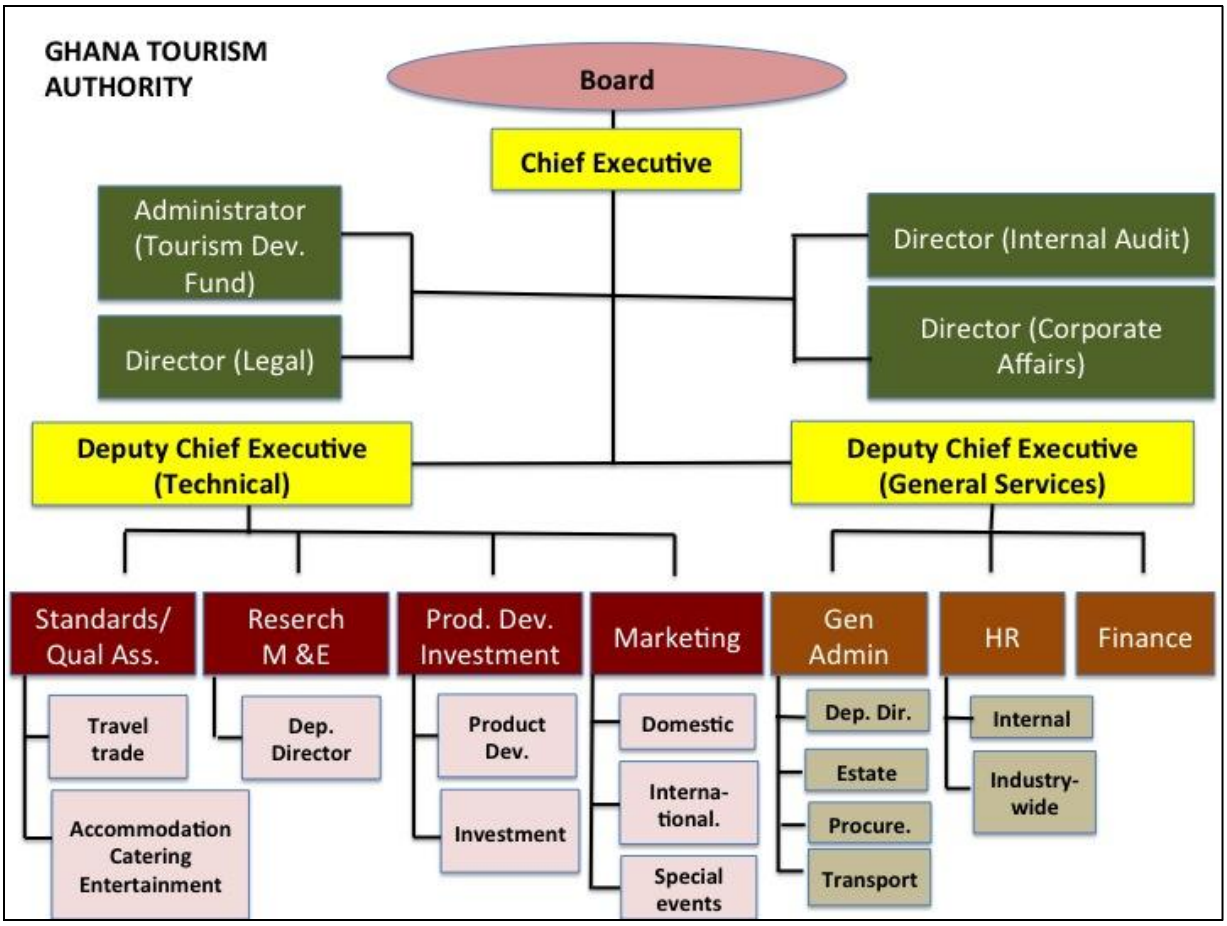
- The regulation of tourism enterprises namely accommodation, catering, travel and charter operations through registration, inspection, licensing and classification
- The promotion and marketing of tourism, both in Ghana and outside Ghana, including the publication of tourism publicity and promotional materials, and participation in fairs and exhibitions

- Carrying out research and studies on trends in the tourism industry both at home and abroad to aid decision and policy-making
- Facilitating the development of tourist facilities and products.

The Authority employs 214 people at headoffice and in 11 regional offices. This is set to expand significantly as the Tourism Act decrees that each district should have a GTA office working with the District Assemblies (see section below on Local Government). This would require a minimum of 170 extra staff. From the 1st of January 2013, 50 district officers should have taken up their post. In addition, the GTA is exploring the possibility of employing people to collect the 1% levy on tourists' consumption from tourism enterprises (see Section 2.8). Key informants interviewed expected that the total staffing of GTA could grow to between 600 and 700 people once all the districts have been manned and the collectors hired.

Figure 13 shows the structure of the GTA, although this has still to be finalised and may change in the future.

Figure 13: Organigram of the GTA



Source: GTA

The GTA is headed by a Chief Executive and comprised two main sections: the Technical Department and the General Services Department, each under the responsibilty of a Deputy Chief Director. The Deputy Chief Executive for the Technical Department oversees four departments: Research, Statistics and Information, Quality Assurance, Marketing and

Planning and Product Development and Investment, each headed by a director. These deparments are made up of several subdepartment focusing on secific areas such as the travel trade, acommodation, catering and entertainment, product development, investment, special events, the domestic market and the international market. There is a Human Resource Development and Training Department on the General Services side which deals with promoting high standards and capacity building of the industry but also of the administration. The General Services Department comprises the following sub-departments: Finance, Audit, and Administration/Personnel. An administrator will be recruited to manage the Tourism Development Fund.

GTA has 11 Regional Offices and is required to establish District Offices and Regional Committees as mandated by the ACT 817.

c. Ghana Tourism Development Corporation

The Ghana Tourism Development Corporation (GTDC) is a para-statal organisation in which the GTA has a 40 per cent stake. Other shareholders are Bank of Ghana, National Investment Bank and State Insurance Corporation. It was set up in 1972 as a limited liability company to encourage tourism development in Ghana. Its vision is:

> *'to serve as a catalytic building partner to attract foreign and local investment for sustained quality tourism in Ghana'*

The stated objectives of the company are to:

- promote and mobilise resources for investment in tourist undertakings and services

- seek equity particpation in joint ventures with Ghanaians as well as foreign concerns and individuals in tourist development projects

- carry on any other business which may render profitable to the operations of the company

GTDC does not receive any subvention from Government and must generate its own operating and investment funds. The company sees its role as a pathfinder, demonstrating how the industry can be profitable and lucrative and facilitating investors. Over the years GTDC has set up several tourism businesses and has become an equity partner in others. Its business interests extend to the following areas:

- using a loan from the Bank of Ghana GTDC invested in the first high category hotel in Ghana, the 4 star Novotel
- it established the Akuaba Travel Agency when the travel agency sector was at its initial stages. It was the only company with tourist coaches to rent to tour operators. Today the sector is strong and, as the Akuaba Travel Agency is not fulfilling its originally intended function anymore, it has now been reabsorbed by the company as a department of GTDC rather than a separate company
- it runs a car rental concern
- GTDC is a partner in the duty free business in partnership with the company '*DUfry'*
- it manages three tourist receptive facilities: 'Big Tree' at Oda, Assin Manso Heritage Site and Odweanoma facility at Atibie. Originally, GTDC managed eight facilities but was confronted with a number of challenges, including land ownership problems, collection and restitution of entrance fees and interference from the District

Authorities. They have acquired the land from the traditional rulers for the three facilities that they manage and have a good relationship with the local community who also benefit from the facilities.

Increasingly GTDC sees its value as providing investment promotion services and partnering with investors by acquiring land. Land issues, which are complex in Ghana, are a deterrent to investors so GTDC's strategy is to acquire land in prime location and to provide it as its share of the future business.

GTDC's most important venture at the moment is the Accra Millenium Convention and Exhibition Centre. GTDC has signed a Memoradum of Understanding (MOU) with investors to build the centre on land it owns at a prime location on the seafront behind Independence Square. Construction is expected to start during the first quarter of 2013 and the building will be inaugurated in 2014. GTDC has also signed an MOU with families located near Shai Hills for the construction of a Geopark and resorts.

GTDC has been working with the Ghana Export Promotion Authority and attended fairs abroad. It is also starting to build a relationship with the Ghana Investment Promotion Centre (GIPC), so that investors enquiring about tourism will be directed to GTDC. It is planning to link its website site with that of GIPC.

d. The Hotel and Catering Tourism Training Institute

The Hotel and Catering Tourism Training Institute (HOTCATT) was established in 1991, just before the formulation of the National Tourism Development Plan, with financial support of the United Nations Development Programme (UNDP) and the International Labour Organisation (ILO). Its objective is to develop and enhance qualified manpower in the tourism industry. At the time of the plan, the Institute was located at interim premises. The training is to focus on hotel and catering operations of Front Office, Housekeeping, Food Production, Food and Beverage Service, and Tour Guiding.

Over the years the Institute has demonstrated a mixed performance. It has had some degree of success, training 10,228 persons across the country and setting up mobile teams to provide training in the workplace for industry. However in 2005 a consultant was hired to evaluate the performance of HOTCATT since 1991 and concluded that it was not quite meeting expectations. This is mainly because it did not receive enough subvention from government, the training equipment was out-dated, the curricula weak, the management style poor, lacked leadership and the staff modestly remunerated[16].

In 2009, the Ministry made the decision to hand over HOTCATT to the Ghana Institute of Management and Public Administration (GIMPA) with the mandate to provide tourism and hospitality training in the country to help improve professional standards in the industry and to uplift the image of HOTCATT. GIMPA was to introduce basic, supervisory and executive programmes to help improve standards in the industry.

However two years later, no much had been achieved. This was attributed to GIMPA's misunderstanding of the MOU and hence its inability to achieve the original objectives. The government set up an inter-ministerial committee to investigate the situation and the outcome was that the MOU was abrogated and HOTCATT reverted back to government.

HOTCATT is in a period of transition. Currently there is no board of directors. Of the 10

[16] Ghana Business News, GIMPA takes over HOTCATT, 22 April 2099; sourced from Ghana News Agency

instructors that they should have, just three are permanent staff and the Institute is obliged to bring in temporary instructors when it has a programme to deliver. At the moment, the Institute is running short courses for industry. In 2011, just 270 students were trained.

Government owns the building where HOTCATT is located. Key informants interviewed for this study felt that government should continue to run the Institute to ensure that training stays affordable but should be supported by the private sector in a Public Private Partnership (PPP) arrangement. A Cabinet Memorandum on the future of HOTCATT is currently pending decision.

e. Metropolitan, Municipal and District Assemblies

The Government of Ghana has been pursuing a policy of decentralisation to:

- establish institutions through federal participation in decision making and
- devolve power and authority to the local level

There are 170 Metropolitan, Municipal and District Assemblies (MMDA) in Ghana. The MMDAs represent government at local level. They have been made responsible for the overall development of their constituencies and are mandated to be the legal planning authority. The National Development Planning Commission (NDPC) issues guidelines for the preparation of the districts' Medium-Term Development Plans. Preparation for the 5-year plans is participatory involving local stakeholders and civil society and annual budgets are set to implement the plans. The regional offices check the plans to ensure consistency and forward all the district plans in their regions to the NDPC. This bottom up approach ensures that the requirements of the districts are taken into account at the national level and empowers the districts to manage their own development.

Under the decentralisation policy certain sectors are designates as 'schedule one' sectors. These are established by administrative procedures as departments of the MMDAs. They report directly to the Assemblies and the sector is automatically included in the Medium-Term Development Plans of the MMDAs.

'Schedule two' sectors, which include the tourism sector, work with the Assemblies but are independent and report back to their ministries rather than to the MMDA. They must negotiate with the MMDA to have the sector included in the Medium-Term Development Plans and they do not automatically have an office at the MMDA offices.

The Tourism Act 2011 decrees that GTA will be have an officer in each district. These will need to set up an office at or near the DA offices and build up a relationship with the assembly to ensure that tourism development is part of the MMDA's plan.

2.7.2 Private sector institutions

Private sector tourism trade associations are represented by the umbrella organisation Ghana Tourism Federation (GHATOF), established in 1995. It comprises 21 corporate and affiliate members. A list of 19 members with contact details that appear on the GHATOF website[17] is provided in Appendix 2.7.1. Membership is referred to as the Governing Council and is headed by a President. Members pay annual dues, however in reality only those that regularly attend meetings pay.

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[17] http://www.ghanatourismfederation.org/ghatof/membership.html

The main benefits for member are:

- Power of unity and affiliation
- Recognition and enhanced prestige
- Access to training and education
- Advantages of collaboration
- Welfare matters

GHATOF membership meets regularly to discuss issues of common interest and consider ways to address these issues. According to key informants only around six members are consistent at meetings and are active, although these are mostly from the larger associations so must be representing a significant proportion of private sector stakeholders. The challenges that have been mentioned in interviews are:

- Leadership
- Weak institutional capacities of the Associations
- Weak capacity of GHATOF
- Funding problem

2.7.3 Public Private Partnership

A project to establish a framework for Public Private Partnerships (PPP) in the tourism sector was launched by the Japanese technical assistance organisation JICA. It successfully brought together stakeholders from all sides to discuss issues in a forum. Both public sector and private sector institutions embraced the idea and during the life of the project meetings were held fairly frequently and were well attended. The forum was to be held on a regular basis after the project finished.

However, meetings have been sporadic. On the positive side the concept of discussing issues together and coming to decisions has become established and the Ministry and GTA are calling on the private sector when certain issues have to be discussed. More importantly Article 42 of the Tourism Act, 2011 decrees that:

1. There shall be a Public Private Partnership Forum to encourage public private partnerships to promote tourism development opportunities
2. The Forum shall be organised by the Ministry in collaboration with the Authority and the Private Sector
3. The Forum shall be used by the Ministry to interact with the private sector on matters concerned with the tourism industry
4. The Forum shall establish committees to deal with specific issues
5. The Forum shall meet at least once each quarter at a place and time to be determined by the Minister

In 2012, just one meeting was held. According to people interviewed for this study, the stumbling block has been lack of funds to organise the meetings. The Tourism Development Fund is expected to fund future meetings. Private sector interviewees would like to have more interaction with the public sector tourism authorities and become more involved with the management of the sector.

The Board of the GTA may be considered as a form of PPP, albeit with dominance of the public sector. The Board, which has not yet been formed, will comprise:

- seven public sector members from different ministries (Tourism, Finance and Economic Planning, Local Government and Rural Development, Culture and Chieftaincy Affairs, Lands and Natural Resources, Environment, Science and Technology) as well as the Chief Executive of the GTA
- four private sector members, one of which will be the Chairman of the Board

The Minister also receive advice from the Ministerial Advisory Board, a body comprised of senior management of the Ministry's implementation agencies but also representatives of the private sector.

2.7.4 Inter-Ministerial Committee

Managing a sector that cuts across several other sectors and that relies on these sectors to operate effectively, the MOT must communicate, cooperate, and collaborate with other ministries and their implementation agencies. Most ministries and many agencies have varying degrees of influence on tourism development and operation, they include:

- ***Ministry of Finance and Economic Planning:*** to manage and develop the sector effectively the MOT and its agencies require capital from the consolidated fund, which is controlled by the Ministry of Finance and Economic Planning

- ***Ministry of Transport / Ministry of Roads and Highways / Ghana Civil Aviation Authority / Ghana Airports Company Ltd:*** Tourism needs good air access and road access to bring international tourists to the country and to ensure that both domestic and international are able to get to tourism areas and sites within the country.

- ***Ministry of the Interior / Immigration Service / Ministry of Foreign Affairs:*** these institutions facilitate the entry and departure of tourists to and from Ghana as well as ensuring the safety of tourists in the country

- ***Ministry of Local Government and Rural Development / National Development Planning Commission:*** tourism development must be included in District and Regional Plans

- ***Ministry of the Environment, Science and Tecnology / Environmental Protection Agency:*** these institutions ensure that tourism firms operate within permitted environmental parametres

- ***Ministry of Lands and Natural Resources / Forestry Commission / Wildlife Division:*** nature attractions, wildlife and protected areas are important tourism assets under the responsibility of these institutions

- ***Ministry of Culture and Chieftaincy / Ghana Museums and Monuments Board:*** cultural attractions, historical buildings, museums, festivals and events are all important tourism assets, many of which are under the responsibility of these institutions

- ***Ministry of Trade and Industry:*** tourism businesses are subject to standards and regulations under the responsibility of this institution such as trading standards, import and export rules, consumer protection and business registration and licencing

Other institutions include Ghana Revenue Authority for taxation, the Ministry of Education for tourism and hospitality education and training, the Ministry of Employment and Social Welfare for issues concerning tourism employment and working conditions in the industry and the Ministry of Youth and Sports. Section 2.2.2 shows the number of institutions that collect tourism statistics.

The Inter-Ministerial Committee on Tourism was set up under the auspices of the Ministry of Tourism to discuss cross-cutting issues under the control of other ministries that affect tourism development and operation. This committee meets on a fairly regular basis and the meetings are chaired by the Minister of Tourism. However, according to key informants interviewed for this study the results of these meetings have been disappointing. As to date, the participants sent by the respective ministries are not at a high enough level in their institution to take and implement decisions on behalf of their ministries.

2.2.5 Civil society

Several non-governmental organisations (NGO) have ben quite active in the tourism sector over the years and have worked with government institutions to develop and in some cased manage tourism activities in Ghana.

i. In the Central Region, the Ghana Heritage Conservation Trust (GHCT), a not for profit NGO, was established in August 1996 to consolidate and further the progress made through the Natural Resources Conservation and Historic Preservation (NRCHP) Project, initiated by the Central Regional Administration in 1989. Its mission is to support and assist in the conservation, protection and maintenance of the Cape Coast and Elmina Castles and the Fort St. Jago, as well as the Kakum Conservation Area where they manage the tourism facilities with the Wildlife Division. As such they are geographically focussed within a part of the Central Region, although their goal is to be able to extend their conservation activities to other parts of the region and to Ghana as a whole, if possible.

ii. The Ghana Wildlife Society is a national environmental NGO that focuses on Education and Public Awareness, Development and Conservation projects throughout Ghana. It manages two community-based tourism initiatives: the visits to the Nzulezu village on stilts in Western Region near Beyin as part of the Amansuri Conservation and Integrated Development (ACID) and community-based eco-tourism as an alternative to farming and tree cutting in the forest at Afadjato in the Volta Region and part of the Afadjato Community Forest Conservation Project.

iii. Over the years, NGO's such Nature Conservation Resource Centre (NCRC), Ghana Rural Ecotourism and Travel Office (GREET), Ricerca e Cooperazione (RC), Netherlands Development Organisation (SNV), Cooperazione per lo Sviluppo dei Paesi Emergenti (COSPE) have been involved in projects to increase the participation of local communities in the tourism sector. These experiences are examined in greater detail in section 2.11.

2.2.6 Traditional rulers and chiefs

Traditional rulers are important to tourism development as often they own or control land that may be appropriate for tourism development, have strong ideas and opinions about what should be developed in their jurisdiction and can strongly influence local communities. Tourism should always be developed with the acceptance participation of the local communities living in the area.

Where there is conflict between local chiefs, this often affects tourism development and community participation.

2.2.7 Assessment of the institutional structure and performance of tourism administration and management in Ghana

The public sector institutional structure is similar to the structure that existed in 1996 with the main differences being the establishment of the GTA to replace the GTB and the additional two new departments at the Ministry. Following Government's policy to divest from state-owned tourism enterprises, the State Hotels Corporation (SHC) no longer exists.

a. The Ministry of Tourism

Whilst it did not advocate the restructuring of the Ministry, the 'Retooling the Ministry Report' highlighted a number of weaknesses in both the Ministry and its implementing agencies that need to be addressed. The most pressing are summarised here:

- **Leadership instability:** the report points out that since 1993 there has been 11 Ministers of Tourism and 4 in the last 3 years – on average one every 18 months. The situation is similar although less extreme for the Deputy Ministers (27 months) and the Chief Directors (43 months). Frequent changes of policy and actions are affecting the credibility of the sector

- **Weak implementation capacity:** due to lack of human resource capacity and to logistical issues

- **Finance:** the Ministry was allocated just USD 5 million in 2010 which Is low for a country the size of Ghana, but actually received substantially less; 77 per cent was spent on operational expenses leaving just 23 per cent for direct investment

- **Human Resource:** The Ministry needs less administrators and more professional technical staff, paid appropriate salaries to attract the best candidates, especially in the PPME and RSI departments. There is a need to enhance the human resource capacity of the Ministry and its agencies by hiring and developing a multidisciplinary cadre of tourism professionals

- **Operational and structural deficiencies:** here the study identified a number of weaknesses including poor communication and alignment of plans within the Ministry due to a lack of corporate plan; a Procurement Directorate that is not needed; a lack of clarity and definition of roles between the Ministry and its implementing agencies with at times encroachment into each other's spheres of responsibility; lack of communication and cooperation between the Ministry and implementing agencies and therefore a lack of synergy between the activities of the Ministry, GTA and GTDC; and poor communication and coordination between public sector tourism institutions and external agencies with tourism-related activities such as the Wildlife Division and the Ghana Museums and Monuments Board

The 'Retooling the Ministry Report' makes a number of recommendations to address these issues, some of which are presented in Chapter 5.

In addition, the following observation were made during this study:

- **Certain core functions as identified in the Ministry's vision and mission are not properly represented at the Ministry or GTA:** The Vision and Mission statements of the Ministry alludes to poverty reduction and environmental conservation, however there is no specific desks or appointed officers neither at the Ministry or at GTA to deal with environmental issues and community liaison and development

- **The capacity of the Ministry's monitoring and evaluation is weak:** This was also observed in the 'Retooling the Ministry Report'. This department should be monitoring and evaluating the activities of the Ministry and its implementing agencies and ensuring that these are achieving their mandates. Many of the issues described above would have been identified and corrective measures taken if the monitoring and evaluation function had been stronger at the MOT.

b. The GTA

The 'Retooling the Ministry Report' evaluated the Ghana Tourist Board (GTB) and identified that it lacked leadership, conflicted with the roles of the other Ministry's agencies (GTDC and HOTCATT), was underfunded and under-resourced, lacked team spirit, did not have a corporate plan and had not had one for years, and has never received any dividends from its 40 per cent share of GTDC.

Now that GTB has been replaced by GTA a page has been turned and some of these issues will not be relevant anymore provided leadership and professional challenges are addressed. At the moment GTA is still in transition from GTB and the Board has not been formed yet. However, certain observations can be made at this stage:

- **The leadership of GTA should not be political appointments:** As a technical implementing agency, the agency should be led by professionals in the field rather than political appointees. Currently the President names the Chief Executive (article 195 of the Constitution) and the two posts of Deputy Chief Executives tend to be named as well. As a result, there is a fairly high turnover of leadership and a lack of continuity, which is impeding the effectiveness of the agency, as the staff has to contend with new management styles and changing priorities and ideas when new management is appointed.

- **GTA is set to grow to a size which could be very difficult to manage:** As mentioned above, GTA will eventually add 170 officers that will be working at district level and an unknown number of collectors of the 1% levy from tourism firms. This will constitute a logistical and managerial challenge and will require experienced and strong management to run the operation, if not professionally managed.

c. Other challenges to address

- **GTDC:** The 'Retooling the Ministry Report' commented on GTDC highlighting the tenuous link between the policy of the MOT and the commercial activities of the company that are competing with the private sector and that the catalytic investment and development role of the company was giving way to short-term commercial profitability. Despite these observations it was felt during the research for this study that GTDC was scaling back its competing activities such as its travel agency business to focus more on partnering investors in tourism development initiatives. The 'Retooling the Ministry Report' pointed out also frequent leadership change and poor corporate governance and compliance as there has been no annual reporting and the company books are not up to date.

- **HOTCATT:** The institution is very weak since it has been transferred back to the MOT from GIMPA, operating with minimum staff and inadequate investment and budgetary support. Cabinet's decision will determine HOTCATT's future. However, a well-functioning and resourced Hospitality and Tourism Vocational School is urgently needed to improve skills in the sector.

- **Public Private Partnership Forum:** This crucial initiative, which is now backed by law, is not being held regularly. If tourism is to develop at a steady rate and is to fulfil its undeniable potential, it is essential that the public and private sector communicate and cooperate in decision-making for the good of the sector and establish joint initiatives.

- **The Inter-Ministerial Committee:** Although this Committee meets from time to time, the level of seniority of the participants is not high enough for any real decisions to be implemented. It is understood that the participants in the Committee should be at least Director level but this has not been abided by. To ensure the attendance of high-level ministerial officers, meetings should be chaired by the Vice-President and his/her office should call the meetings.

2.8 Policy and regulatory framework

The tourism policy and the regulations that are put in place to enforce the policy are the main development and management instruments at the government's disposal to ensure that tourism is developed and operated in a sustainable manner. They provide the means to direct, manage, and regulate the sector and to guide the activities of stakeholders in the country. This section describes the instruments that exist in Ghana.

2.8.1 The National Tourism Policy, 2006

A comprehensive National Tourism Policy was formulated in close consultation with stakeholders over a two-year period from 2004 to 2006. It provides a detailed background to the tourism sector in Ghana, the policy framework that existed at the time, the performance of the sector and identifies key constraints and limitations in:

- the supportive and conducive environment – constraints of a political, legal/policy framework, economic, social, and environmental nature are identified
- the quality of tourism products and services
- tourism marketing
- financing the industry
- tourism management and administration

The policy is guided by the principles of Ghana's Growth and Poverty Reduction Strategy (2006-2009), the New Partnership for Africa's Development (NEPAD) and the Revised Treaty of the Economic Community of West African States (ECOWAS). It is formulated around eleven themes; each with a stated objective and set of strategies. The emphasise is put on private sector-led growth, high level of public-private partnership, and government providing the appropriate environment to attract investment and commitment from the private sector. To achieve these objectives a policy has been formulated.

a. Review of the policy and management section of the policy document

The themes and objectives proposed in the policy document to drive the work of the Ministry of Tourism and its implementing agencies are:

Product development: *to enhance the quality, diversity, and complementarities of Ghana's tourism products in order to lengthen the stay of tourists thereby maximising benefits for both the national economy and local communities;*

Tourism resources management and protection: *to effectively manage and conserve the cultural, environmental and historical resources of Ghana, balancing economic utilisation with sensitivity, preservation and conservation;*

Quality and standards: *to ensure and maintain high standards of services and facilities in order to be internationally competitive;*

Marketing and promotion: *to ensure the promotion and expansion of international, regional and domestic tourism by developing Ghana as one of the preferred tourist destinations in Africa;*

Tourism investment: *to promote investment in tourism development by both local and foreign investors;*

Human resources development: *to ensure that the human resource capacity (quality and quantity) required for tourism development is in line with demands of the industry so as to ensure its competitiveness (i.e. professionalise staff at all levels);*

Tourism education and awareness: *to create and promote tourism awareness at all levels of society;*

Security, safety and privacy: *to ensure the health, security, safety and privacy of all tourists and tourist sites safeguarding against negative side effects of tourism on local communities;*

Regional and international cooperation: *to collaborate with neighbouring countries in support of tourism development initiatives on the continent and in West Africa in line with NEPAD, ECOWAS, UN World Tourism Organisation (UNWTO) as well as other UN protocols and agreements;*

Tourism research and management information systems: *to have an accurate and up-to-date understanding of the tourism industry for effective and efficient tourism planning, marketing and promotional purposes.*

The policy document also describes in detail the role of key stakeholders in the tourism sector as follows:

- the government's five key roles of: *facilitation, coordination, planning and policy-making, regulation and monitoring, and development promotion*;
- the role of the local authorities in the development and promotion of tourism
- the private sector;
- civil society organisations, especially environmental and community-based organisations, in developing and spreading responsible tourism practices;
- communities and traditional leaders in the sustainable development of tourism attractions;
- development partners in supporting the development of tourism as a vehicle for national and local economic, social and environmental improvement;
- academic and research institutions in supporting the development of tourism;
- tourists in contributing to the economic, social, and environmental well-being of Ghana both at the national and the local levels.

The policy document examines the structure of tourism administration and management and proposes three alternatives.

- The first is to maintain the status quo with the Ministry operating with its two implementing agencies, the Ghana Tourist Board (GTB) and the Hotel and Catering Training Institute (HOTCATT) without changing any functions and responsibilities.

- The second is to maintain the status quo but to make some amendments. These would include the Ministry becoming more of a technical rather than just an administrative body with great involvement in decision making at the local level and greater influence in the construction and maintenance of tourist related infrastructural developments. The GTB would take on additional specialist functions and would be strengthened in terms of financial resources. This option also establishes a high-powered and effective Inter-Ministerial Committee on tourism to coordinate action with agencies that are responsible for components of the tourism product such as the

Wildlife Division and the Ghana Museums and Monuments Board.

- The third alternative presented is the restructuring of the Ministry and its implementing agencies, replacing the existing institution with an 'action oriented structure built around the formation of a national tourism authority with clear and far-reaching powers and functions to effectively and efficiently facilitate the development of the tourism industry'. This option recommends the establishment of the Ghana Tourism Authority. This is the alternative that was eventually chosen and implemented, as described in the previous section.

The policy document finally recommends an implementation strategy and plan, a communication strategy and a monitoring and evaluation strategy for effective implementation of the National Tourism Policy.

b. Assessment of the National Tourism Policy Document

The following section highlights areas that should be addressed to improve the policy document.

- **A long and complex document**

The draft National Tourism Policy is very comprehensive covering all the aspects to achieve the development goals that are set out in the document, but it is very long at 45 pages. It has not been ratified by the Parliament. This leaves the Ministry in a weak position when discussing tourism issues with Cabinet, as there is no officially recognised policy document to refer to.

The document contains a lot of information, covering the background to the sector, the performance of the sector, the key constraints and limitations affecting the sector and the future of tourism in Ghana before actually getting to the policy vision and the policy objectives. This covers some 20 pages (including the introductory pages).

The section on tourism administration and management describes the different roles of key stakeholders and proposes changes to the Ministry and its implementing agencies, the policy implementation, communication and monitoring and evaluation strategies. These topics are covered in a further 8 pages.

The policy vision, the policy context, the policy objectives and the strategies to achieve them are described in 13 pages. Therefore the crux of the document, which is to guide the government's desired outcomes in tourism, is buried in interesting but superfluous information for a document of this nature.

The policy was never submitted to Parliament for ratification. A concise and clear document should be drafted and finally submitted.

- **Poor understanding of the tourism sector by other government institutions**

The policy document attempts to inform about the sector by providing background information about the sector, its performance and its contribution to the economy to put the tourism policy in context. Clearly, it was felt that this was necessary because in general there is poor understanding among policy-makers in Ghana of tourism's contribution as a productive sector to the economy of the country. Many administrators and technical staff at Ministries and their agencies (including those in key Ministries) who were interviewed during this update of the master plan, felt that tourism is the concern of the private sector and that the role of the government should be limited to regulation and control, duties that do not require much support to be carried out effectively.

Other agencies such as the Wildlife Division and GMMB see tourism as a convenient way to generate income to supplement their budgets and a policy formulated by a Ministry other than their own is not one that they need to abide by.

➢ **The National Tourism Policy needs to be updated**

The policies presented in the document are detailed and clearly expressed, and provide strategies to achieve the stated objectives. However, the situation in Ghana has evolved since 2006, especially since 2011 when the public administrative bodies of the tourism sector were restructured as the Tourism Act 817 came into effect (see Section 2.8.2). There is a need to update certain sections of the policy to reflect the changes for instance those referring to the GTB and strengthen other sections for instance on data collection and the establishment of the Tourism Satellite Account to ensure that best practice is applied.

The recommendations contained in this update of the National Tourism Plan in each of the areas that are being assessed should provide the information required to update the policy.

2.8.2 The Tourism Act 817 of 2011 and associated regulations

The Tourism Act 817 empowers the tourism sector and establishes the Ghana Tourism Authority (GTA) 'to regulate the tourism industry and to provide for related matters'. It was passed by parliament on 16th of May 2011.

a. Powers under the Act

The law endows the sector management with several new powers. It:

- establishes the GTA as the regulatory body for tourism with the object of the Authority to promote the sustainable development of the tourism industry internationally and within the country and it defines the functions of the GTA
- sets up the Tourism Development Fund to provide funding for tourism and tourism-related projects and programmes, detailing the sources of the fund
- charges the GTA with the responsibility of registering and licensing tourism enterprises and also establishes a Tourism Appeals Panel (schedule of the Act defines 'Tourism Enterprises', either as establishments or organisers of activities)
- expands the GTA to be represented at district level
- establishes a Public Private Partnership Forum to encourage partnerships between the sectors to promote tourism development opportunities
- empowers the Minister to designate sites that have been identified as tourist sites and to set standards and control activities at these sites

b. Regulations

The Minister is empowered by the Act to make regulations covering several areas, including:

- Tourism development and management
- Registration and licencing of tourism enterprises
- Classification of hotels

- Standards to be maintained in tourism enterprises and ancillary services
- Health, safety and security (staff, tourists, food and beverage, etc.)
- Licencing and operation of charter flights in consultation with Ghana Civil Aviation Authority
- Encouragement of pro-poor tourism and business behaviour
- Tour guides
- Prohibition of activities that are not in the public interest
- To carry out matters and provisions prescribed in the Act

The following Legislative Instruments (L.I.) have been passed:

i. Tourism (Levy) Regulations, 2012

This sets out the rules and procedures for the collection of the 1% levy payable by patrons of tourism enterprises on the consumption of goods and services by tourists.

ii. Tourism (Travel Trade Enterprise, Registration And Licensing) Regulations, 2012

This presents the procedures for the registration and licensing of tourism enterprises and sites. It also sets out specific provisions relating to charter flights.

Harmonised Standards for Classification of Hotels

This regulation refers to the registration of accommodation and catering enterprises, inspections of units, preparation and storage of food, the cleanliness and hygiene of the food preparation and dining areas, working conditions for staff, categories of accommodation, hotel classification and grading standards, and grading of restaurants.

The Promotion of Tourism Instrument, 2005 L.I. 1817 provided incentives to private sector operators for the import of foreign-made equipment but it was withdrawn a year ago. This regulation was previously under the Ghana Investment Promotion Centre (GIPC) but was abused by some operators who imported luxury items and sold them on the open market. However after a weaker than usual performance by the Hotel and Catering sectors in 2011, the incentive was recently restored. It will now be administered under the Ghana Revenue Authority (GRA).

c. The Tourism Development Fund

One of the most important articles in the Tourism Act, 2011 is the establishment of the Tourism Development Fund, effectively allowing the GTA to administer its own revenue from five sources:

- seed capital from the Government
- a one per cent levy payable by a patron of a tourism enterprise specified in the Schedule
- donations and grants
- moneys earned by the operation of any project, enterprise financed from the Fund or investments, and
- other moneys that the Minister for Finance in consultation with the Minister may

determine with the approval of Parliament[18]

The fund is to be used for:

- marketing and promotion of tourism
- capacity building, market research and development of infrastructure
- development and promotion of other entrepreneurial activities
- tourism export trade-oriented activities of institutions
- tourism education and training

It will be administered by the GTA Board and a representative of the Controller of the Account General.

It is estimated that the 1% levy will accrue GH¢ 3.8 million from the monthly collection by star-rated hotels on room rates alone not counting catering and other services. This will represent around 83% of the total sum on rooms that will be collected. This sum does not include moneys that will be collected by other accommodation establishments, budget hotels, tour and travel enterprises, restaurants and drinking bars.

All tourism firms will have to register as collectors of the levy. The Ministry of Tourism and the GTA have embarked on a sensitisation programme throughout the country to explain the levy to tourism operators and how the system will function. To date 51 firms have been registered.

d. Assessment of the Tourism Act 817, 2011

The passing of the Tourism Act 817 in 2011 is a very important step for the development of tourism in Ghana and provides the sector with much needed credibility. It endows the sector with a degree of financial independence and ensures closer monitoring and control of the quality of tourism establishments and services in Ghana, including in areas that are under the control of other public agencies such as accommodation at National Parks and enterprises operating at museums, forts and castles. The Public Private Partnership Forum should provide a platform to explore joint tourism development opportunities and strengthen the relations between the public and private sectors.

An important article (45) gives the Minister the power to designate tourism sites and set standards for the site, in consultations with the appropriate body, institutions and property owners. Activities can be controlled and, if need be, prohibited at these designated sites.

However, there are some weaknesses in the Act that could be addressed in an amendment.

- **The functions of the GTA listed in the Act do not reflect the role of the Authority as described on its website and in other documents**

On its website, the GTA states that its functions are:

1. The regulation of tourism enterprises, namely accommodation, catering, travel and charter operations through registration, inspection, licensing and classification
2. The promotion and marketing of Tourism, both in Ghana and outside Ghana, including the publication of tourism publicity and promotional materials, and participation in fairs and exhibitions
3. Carrying out research and studies on trends in the tourism industry both at home and

[18] Tourism Act, 2011

abroad to aid decision and policy-making
4. Facilitating the development of tourist facilities and products[19]

However, in the Act, 16 functions are listed. Of these:

- six refer to regulation, licencing and the guaranteeing of safety and security
- two to developing and establishing standards and guidelines
- two to administration (of the Tourism Development Fund and of GTA)
- two to carrying out research and collecting statistics,
- one to developing Public Private Partnerships
- one to supporting pro-poor and sustainable tourism
- one to acquiring land for tourism development
- one to advising the Minister on matters of policy

Marketing and promotion, one of the main responsibilities of the GTA, is not referred to at all in Article 3 of the Act. The list of functions is strongly weighted towards regulation and licencing and this is what external agencies perceive the role of tourism administration and management to be. An important marketing function such as attending trade fairs around the world to promote Ghana is seen as a benefit or a perk and not a serious activity that should be carried out on behalf of the country. The Ministry of Finance is therefore reluctant to support such activities.

This can have significant implications; for instance, a request by the GTA for additional funds from the Ministry of Finance to launch a marketing campaign to take advantage of a one-off opportunity may be refused because 'marketing and promotion' are not listed by law as official functions of the GTA.

The Authority's functions listed in Article 3 of the Act should be amended to reflect equally its responsibilities as describes on the website and in other literature.

The 'Retooling the Ministry Report' remarked that the number of functions prescribed in Act 817 was 'a tall order for one institution'. It notes that the British Tourist Authority states just three functions.

- **Some of the wording in the Articles of the Act is ambiguous and should be revised**

For instance, Article 45 empowers the Minister to designate tourist sites and 'set standards for the tourist site'. It is not clear whether this means that the Minister has authority over sites that are in the control of other agencies in tourism matters. For instance, if an agency decides to develop a tourism product in its area of jurisdiction, which is not suitable to Ghana's overall tourism offer, is the Minister empower to prevent this or not?

- **Too strong an emphasis on regulating and licensing and not enough on enabling and mentoring the sector**

Six of the sixteen functions listed above refer to licensing, regulating and monitoring the tourism sector. Enabling, supporting and mentoring the sector is not identified as a role for the GTA. These are vital functions of a public sector tourism administration, which should be seeking to provide a strong basis and a framework for the private sector to successfully

[19] GTA Official Website: http://www.ghana.travel/ghana_tourist_board/

operate and generate income for themselves and for the country. Ensuring that firms in the sector are operating legally and providing the quality and the services that they promise is important but there is a fine line between partnering the sector and policing the sector.

As it has been pointed out in the 'Retooling the Ministry report' the 'concept of regulation is founded on a "policemen" approach, where rules and regulations are made for industry and the inspector comes to check and ensure compliance'. It suggests changing the wording to 'quality assurance' and mentioning 'consumer protection, public health and safety' as well as fostering 'collaborative partnership with industry to assure quality'.

In several successful tourism countries, the private sector is responsible for ensuring quality assurance in the countries tourism sector by controlling the hotel classification system. A good example is that of South Africa (see Section 5.1).

- **The Board, the governing body of the Authority, has not been formed**

The list has been submitted to the Cabinet for inauguration by the President but no action has been taken yet. This is causing some concern among stakeholders. The Board of the Ghana Tourist Board, which is now dissolved, has been asked to serve as a temporary board. The new Board will be responsible for administering the Tourism Development Fund, yet the collection has started and a bank account has been opened to receive the contributions without the board being in place. This has confused some of the stakeholders interviewed for this study. It is felt that without a permanent board GTA will be directionless and not be able to perform efficiently.

- **The collection system for the levy is not yet in place**

The GTA is not clear as to the exact mechanism that will be used to collect the levy. It is not keen on another agency such as the Ghana Revenue Authority (GRA) collecting the levy on its behalf. It fears that the money will first go into the consolidated fund and GTA would then have to apply for the money to the GRA without any guarantee that it will receive the full amount. In any case for such a system to work, the VAT collection law would have be amended.

Several solutions to collect the levy have been discussed. These include relying on the tourism operators to pay monthly automatically into the bank account that has been opened by GTA and recruiting and training a team to collect the money on a continuous basis. It is likely that there would be defaulters who would avoid paying if the levy is not physically collected but on the other hand managing a large team of collectors would be difficult and costly, particularly with regards to collecting from small businesses such as chop bars, which will not contribute much to the fund.

- **Collecting the levy from very small businesses may not be cost effective**

As pointed out above, it may cost more to collect the levy from small businesses than it is worth, therefore identifying the critical mass that will produce the greatest income and collecting from them rather that blanket coverage of all firms in the sector should be considered.

2.8.3 The visa regime

While it is not within the Ministry of Tourism's responsibility or control, the visa regime significantly affects the tourism sector in Ghana.

All foreign visitors are required to obtain a visa before travelling to Ghana from the Consulate in or the nearest Embassy to their home country. Exemptions are accorded to ECOWAS national as well as passport holders from certain African and Asia countries (Kenya, Malaysia, Singapore, Egypt, Hong Kong, Trinidad and Tobago, Malawi, Lesotho, South Africa, Zimbabwe, Tanzania, Uganda, Swaziland – see 2.8.1).

- **Cumbersome visa procedures**

Obtaining the visa is cumbersome, requiring the Embassies abroad to send faxes to several concerned institutions in Ghana to acquire their approval before the visa can be issued. This procedure generally takes a long time. The Ministry of the Interior and its implementing agency, the Immigration Service, and the Ministry of Foreign Affairs along with other concern institutions are exploring setting up an electronic system which will allow approval to be considerably speeded up.

It is difficult for a national of a country to obtain a visa to Ghana in a third country. For instance a British traveller wanting to enter Ghana from Burkina Faso would need to obtain the visa in London, as it is not possible in Ouagadougou, making cross-border tourism from neighbouring countries difficult. This means that tourists must plan their trip to Ghana ahead, which precludes last minute decisions to visit the country. This has a significant impact on expatriate tourists living in countries surrounding Ghana who may in other circumstances visit on short- and weekend-breaks.

Competing successful tourism countries in Sub-Saharan Africa offer visa exemptions to the larger tourist generating countries (see 2.8.1 for comparison of the visa regime in selected African countries) without compromising the safety and security of the country.

There are several reasons why requests by the Ministry of Tourism to ease the visa regime have not been heeded. Key informants interviewed during this study explained that security is paramount. Visa applications must be carefully screened before they are approved to deter criminals and terrorists from entering the country. Experience of other countries show, however, that if proper screening is done at the border there are virtually no security breeches. Furthermore, certain nationalities as diverse as those from neighbouring Nigeria, Egypt and Singapore are exempt from obtaining a visa to enter Ghana (see 2.8.1), which would suggest that the security argument does not apply to nationals of these countries. Reciprocity (charging visa fees to visitors from countries that charge Ghanaian entry fees to their country) was also mentioned.

- **High-cost of visa**

The cost of the visa is very high compared to other countries in Africa. A single entry tourist visa cost £56.25 (USD 90) and takes up to 6 days after the appointment to present the application. For business travellers and officials on government business, the receiving organisation in Ghana may apply on behalf of the visitor for a visa on arrival for a fee of USD 150.

Mauritius, which received 965,000 tourists in 2011, opens its borders to nationals of a relatively large number of countries, and for those that it doesn't it provides visas free of charge. Many of the World's main tourist-generating countries are exempt from obtaining a visa to enter Senegal and the cost for those for which a visa is required is £15 (USD 24) for double entry tourist or business visa. Most nationals that make up the majority of tourists to Ghana are exempt for obtaining visas in Senegal, which give Senegal a strong competitive advantage (see Appendix 2.8.1).

The World Economic Forum's Travel and Tourism Competitiveness Index ranks Ghana's visa requirements low at 114 out of 139 countries. This indicator measures the number of countries whose citizens are exempt from obtaining a visa or can obtain a visa on arrival.

- **Previous recommendations on easing the visa regime have not been implemented**

Previous tourism plans and strategies identified the visa regime as a barrier to tourism development in Ghana and recommended actions to address the problem.

The Strategic Action Plan 2003-2007 recommended the creation of a public/private sector working group to ease visa rules and lower costs. The actions prescribed in the plan to improve visa acquisition at all entry points included making visas available at a cost competitive with competing tourism destinations and reviewing the visa acquisition process at Ghana missions abroad to simplify and reduce costs of visas.

The Marketing and Product Development Strategy for Ghana West Coast (2010) recommended engaging an Economist to carry out an economic impact study highlighting the costs and benefits of the visa regime on the performance and development of the tourism sector; a conference was then be organised to present the findings of the study and to suggest the way forward; finally it would be backed up by a media campaign to publicise the results. This is endorsed in this document and expanded to include other areas that need highlighting (see Section 5.1).

The cumbersome visa procedures and the high cost of the visa were again highlighted in the Tourism's Sector Medium Term Development Plan – 2010-2013[20]. The document states that 'the long-term view with regard to tourism administration and management is to have in place, within a timeframe of ten years, a structure that is well suited to organising and coordinating the industry in line with best practice'.

The Ministry of Tourism is responsible for creating a conducive operating environment and this includes the visa regime.

Under the policy theme 'Regional and international cooperation' in the 2006 National Tourism Policy the following strategy was formulated:

> *'Promote adoption of a common visa regime for tourists to ECOWAS countries in order to facilitate cross-border visits between these countries while collaborating on immigration and security matters (i.e. using the Schengen visa agreement in the EU as a mode)*'[21]

Over 70 Tourism Ministers from around the World attended the 6th UNWTO Ministers' Summit on "Open Borders and Open Skies – Breaking Barriers to Travel and Tourism" held at the World Travel Market tourism trade fair in November 2012 in London. They concluded that complicated visas processes and policies and limited air connectivity continue to present major barriers to the growth of travel and tourism. They called for increased intra-governmental cooperation and support from the highest levels of government and for political

[20]Government of Ghana Ministry of Tourism, Tourism Sector Medium-Term Development Plan, September 2010
[21] Government of Ghana Ministry of Tourism and Diasporan Relations, National Tourism Policy (draft), August 25 2006

commitment to break such barriers. Speaking at the summit, UNWTO Secretary-General, Dr Taleb Rifai stated: ‘Our main message is clear: lengthy, expensive and complicated visa procedures and policies which limit the development of air travel are obstacles to the continued expansion of travel and tourism. Removing them will stimulate demand, increase exports, grow the economy and create jobs[22].’

Despite the number of recommendations made over the years the visa situation in Ghana remains difficult and needs to be resolved. To compete on the global tourism stage, Ghana must adopt procedures employed in successful tourism countries. The Ministers at the Summit stated that ‘technology could play a leading role in transforming visa processes but that important efforts were required to accelerate the implementation of e-visas, a powerful measure considering the growing number of tourists booking online’[23].

[22] eTN Global Travel Industry News, *Tourism Ministers cite complicated visas processes as barriers to travel* growth, Nov 08, 2012; http://www.eturbonews.com/32158/tourism-ministers-cite-complicated-visas-processes-barriers-trav

[23] ibid

2.9 Tourism human resource in Ghana

The tourism development objective for the Human resource in the industry as stated in the 1996-2010 Plan was that:

> *"adequate education and training of the manpower to work in the public and private sectors of tourism must be carried out in an effective and systematic manner so that, in the public sector, tourism is professionally managed and, in the private sector good quality services are provided to tourists. Also training should be seen as a shared responsibility between the public and private sectors"*

The tourism industry has been growing at an average rate of 14 percent in the area of international tourist arrivals according to the Ghana Tourism Authority. The growth of the tourism industry in Ghana can only be sustained with adequate and quality professionals. However, there is a shortfall in the supply of trained, skilled and efficient workforce to deliver quality service, thus posing serious challenges to the future growth and competitiveness of the industry. This section of the report gives a situation analysis of the human resources of the tourism industry in Ghana.

A casual analysis of the capacity of the human resource in the tourism industry since 1996 shows some improvement though it's very difficult to quantity due to limited or lack of relevant data. Though there has been some education and training both for the public and private sector workforce, this has not been done in an effective and systematic manner. Again evidence for such activities is not easy to come by. This raises the challenge that the industry has with data collection and collation for effective decision-making. The potential quantity of Ghana's' human resource in the tourism industry is exceptional but improvement in its quality have only been barely developed systematically in a coordinated manner. Thus, at present, there is a huge gap between both the quality and quantity of human resource requirements of the tourism industry. It is therefore important that the human resource capital of the tourism industry in Ghana is given the needed attention to provide highly qualified professionals to match the demand and supply needs of the industry, whilst providing quality service to tourists, improving productivity, reducing poverty and increasing employment.

2.9.1 Human resource development, employment and quality of data

Tourism, like any other service sector is highly labour dependent with a large informal sector. It has the potential for creating employment and income generating opportunities for the poor, women, the youth and the handicapped who often encounter difficulty in finding jobs in the formal sector[24].

Worldwide, tourism was expected to generate about 9 per cent of total GDP and provide for more than 235 million jobs in 2010 representing 8 per cent of employment.

According to the GTA, direct and indirect employment in the tourism industry increased from 172,838 in 2005 to 324,000 in 2011. These figures are only based upon registered and licensed tourism establishments by GTA. The availability of employment data on only the formal sector of the tourism industry emphasise the limitation (human and financial) in data collection. Thus available data does not demonstrate the true potential of tourism in job creation and income generation in the formal and informal sectors in Ghana. As such available data on employment in the tourism industry is not succinct, and does not contribute

[24] Sonne, 2010

to meaningful database to underpin human resource development planning, monitoring and evaluation. Despite this, available data shows that direct and indirect employment in the tourism industry in Ghana has been growing steadily at an average rate of 11 per cent (see Table 25). However, majority of jobs in the formal are in the lower ranks of the industry (e.g. room, attendants, food service, and food production).

Table 25: Direct and indirect employment in the tourism sector, 2005 – 2012

	2005	2006	2007	2008	2009	2010	2011	2012
Total Employment	172,823	183,192	206, 091	234,679	263,157	291,202	324,000	359,000
Growth rate	--	6.0%	12.5%	13.9%	12.1%	10.7%	10.2%	9.7%

**** 2012 figure is provisional*

Source: GTA, 2011[25]

The total employment figures, as shown in Table 25 comprises both direct and indirect employment in the tourism industry in Ghana, has been increasing steadily since 2005. It has been noted that these figures were generated based on licensed and registered tourism establishments and does not cover establishments and employment in the informal sector such as food vendors, majority of chop bars and drinking bars and also those tourism enterprises in the formal sector (especially car rentals, tour operations) that are not members of the registered Trade Associations. Although it seems the informal sector of the tourism industry contributes significantly to the growth of the industry, there is no credible data to show for this. Current data collection methods are limited to licensed and registered enterprises and do not include the informal sector. As a consequence, developing appropriate training interventions has been a challenge; hence the large number of untrained and unskilled workers in the tourism sector and poor service delivery experienced by tourists.

- **The need for an in-depth study on tourism employment and the regular collection of data**

To achieve sustainable human capital base required for tourism development, employment data must be collected and analysed to cover both the formal and informal sectors so that the development of targeted training programmes can be matched with employment levels. The need to undertake a comprehensive and in-depth study of tourism's contribution to formal and informal employment and establishment of a correlation between employment and trained and untrained workforce would require urgent consideration.

The need for such a study is heightened by the absence of up-to-date data and also the incompleteness of available data makes it more imperative when one considers the available data on employment figures in the tourism industry by sectors. Using the 2008 data, which is the most up-to-date data available on employment in the sectors of the tourism industry, the total direct employment generated by the tourism industry was 90,372[26]. This figure is segmented into the various sectors in the tourism industry as shown in Figure 14. The challenge with this data, for example, is that it does not capture data on employment in the informal sector and also it does not explain the contribution of the components in each sector.

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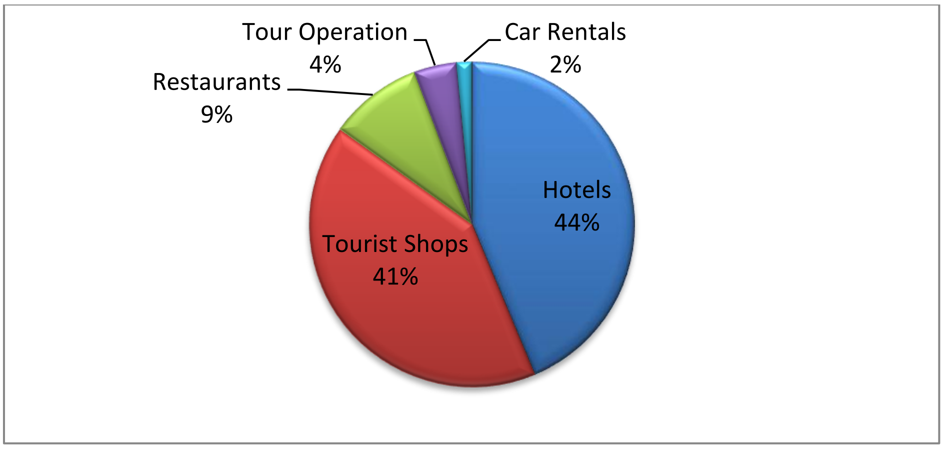
[25] It should be noted however, that the statistics used for the economic projections in Chapter 5 are based on a combination of economic analyses carried out by the Economist to develop this Master Plan and are more conservative than those presented in Table 25

[26] Bank of Ghana, 2007

Figure 14: Direct employment by sectors (2008)



Source: GTB, 2009

In spite of these deficiencies, the percentage figures for the various sectors give an indication for the allocation of resources and serves as a guide to the number of workforce for whom capacity-building programmes should be geared towards.

2.9.2 Linking Information Technology with tourism human resource development

Though research on the use of Information Technology (IT) in the tourism industry is very sparse, it can be conjectured that IT is not utilised to any much extent in the tourism industry currently. With the exception of the top star-rated hotels that utilises property management systems in their operations, most tourism establishments in all sectors of the industry have computers that may be connected to the internet but do not have software to facilitate their technical operations. It can be inferred that perhaps the IT capacity of the human resource in the industry is low.

- **The need for an in-depth study on the use of IT in the industry**

This calls for a study of the extent to which IT is being used to facilitate the development of the industry and the human capital available, and the need to promote the use of IT in the industry.

2.9.3 Quality of service and industry/ownership structures

Interviews with both domestic and foreign tourists in Ghana indicated that the level of the quality of services in Ghana's tourism industry is poor and needs to be improved upon. Most tourists complain of poor service quality, which infers that the quality of workforce in the industry is below par and requires immediate capacity building interventions at all levels. A sustainable tourism industry led by the private sector and guided by the public sector can promote growth and job creation, social cohesion and alleviate poverty, if the workforce in the industry is given the necessary training and competency skills.

- **The need to improve the public awareness of tourism employment opportunities**

The fragmented nature of the tourism industry with majority of employers being small and medium sized operators with a mixed bag of social and economic motivations that have implications for the quality of service. The effect of such an industry structure and ownership is that is that there is a gap between the expectations of the public and private sector. Also, this inhibits the correlation between industry job positions and skills and capabilities needed; and the level of remuneration in the industry. The tourism industry in Ghana is reputed for low remuneration and poor working conditions. These factors do not encourage the attraction and retention of staff with requisite capacity needed for the sustainable development of the industry. From the foregoing there is a need to awareness creation in both the public and private sectors to understand the importance of tourism and the benefits that can be derived from it.

The very fragmented, multi-faceted and service centered nature of the tourism industry presents challenges in the areas of accessibility to training and development of its workforce. The accessibility, availability and affordability of quality training institutions are major challenges that need to be addressed to achieve the desired development objective of the tourism industry. Data from the GTA shows that majority (over 90%) of tourism businesses in Ghana can be classified as Small and Medium Enterprises [SME] with a few big players, mainly in the hotel industry, and their ownership is 100 per cent private. Such an enterprise and ownership structure means that most of these enterprises have staff with qualities that creates challenges when it comes to training and developing their workforce since the Human Resource management in such enterprises aligns with the motivations of the enterprise owners.

- **Absence of a clear national tourism HR policy framework**

The effects of ownership and industry structures in the tourism industry as described above is aggravated by the absence of a clear national policy framework on training and development for the public, private as well as the large informal sectors of the industry. Research shows that the level of performance of small businesses is primarily attributed to the education, experience, skills and the personal entrepreneurial characteristics of the owners and their workforce[27]

Even though five training needs assessments had been conducted on the tourism industry to date, as shown in Table 26, none of these documents has been implemented fully. All the documents clearly indicate that there is a shortage of skilled staff and managers in the public and private sectors of the tourism industry.

Table 26: List of human resource assessment studies on Ghana's tourism sector

	Document	Funded or / undertaken by	Date
1	Training needs assessment of the tourism industry	United States Agency for International Development Under Ghana Tourism Development Capacity Initiative	August 2003
2	Manpower development for tourism industry in Ghana	United Nations Development Programme under the integrated	1995

[27] Lerner and Haber, 2000.

		tourism development programme GHA/92/013	
3	Proposal on quality assurance and micro business development for the tourism industry in Ghana	University of Cape-Coast, Kwame Nkrumah University of Science and Technology, Golden Beach Hotels Ltd, University of Maryland Eastern Shore	June 2003
4	Avtol Report on Capacity building for Hotel Catering and Tourism Training Institute (HOTCATT)	Technical team from Mauritius	2005
5	Modernisation and retooling of the Ministry of Tourism into an effective and proactive policy instrument of state	Plan Consult	June 2011

Source: Retooling and modernising the Ministry of Tourism into an effective and proactive policy instrument of state, 2011

Another challenge that must be addressed by policy interventions is the spatial distribution of tourism enterprises and how the provision of workforce training could be used as an incentive to promote fair distribution of tourism enterprises to less endowed regions. Figure 2 in Section 2.1.1 shows that over 42 per cent of all tourist accommodation enterprises are located in the capital city, Accra, whilst the rest are scattered in other regions with consequences for accessibility to quality training institutions.

The 1996–2010 Plan stated that in the short to medium term, the supply of tourist accommodation in the major cities is satisfactory but the quality of the stock need to be upgraded. In the long term, however, government intends to spread the supply of tourist accommodation throughout the country by providing incentives to the private sector to encourage them to set up quality tourist accommodation facilities outside the two major cities as well as improve on the quality of existing ones. Given the dramatic increase in size of the accommodation sector (see Section 2.1.1), the important question is to what extent has this recommendation has been achieved in accordance with government policy?

2.9.4 Public sector training

Training for both the public and private sectors is at the heartbeat of any successful tourism development strategy, and training of the tourism workforce must be seen as a joint responsibility of government and the private sector. The 1996–2010 Plan stipulated that both the public and private sector have important responsibilities for the education and training of persons to work effectively in the tourism industry. In the Public sector, the responsibility for training rests with the Ministry of Tourism (MOT) and implemented through its supporting agencies Ghana Tourism Authority (GTA) and Hotel Catering & Tourism Training Institute (HOTCATT).

- **No structured staff training policy at MOT and its agencies**

The challenge is that both the MOT and GTA do not have a structured training policy framework for their staff and the private sector. HOTCATT, the training agency of MOT, though offers training at the skills level mainly to the private sector does not have capacity in terms of human capital, and facilities to achieve its mandate. In addition the Institute is plagued with a lack of effective leadership and has been woefully financially under resourced over the years.

Other agencies in the public sector such as Ghana Tourist Development Company (GTDC), Ghana Museums and Monuments Board (GMMB), Ghana Wildlife Authority (GWA) and Ghana Immigration Service (GIS), whose activities relate to the development and promotion of quality tourist experience, have not been receiving appropriate and relevant training in the area of tourism.

- **Lack of professional, managerial, technical skills at MOT and its agencies**

The report on Retooling and modernizing the Ministry of Tourism into an effective and proactive policy instrument of state, 2011 shows the absence of a published national policy framework on human resource management and development to guide the planned development of the industry. It also indicate that presently, the Ministry of Tourism and its agencies have academically qualified staff, but the majority lack the requisite professional, managerial, technical skills and competencies to carry out their individual roles.

The attitudes and perception of MOT and industry enterprises towards training and development need to change through appropriate training interventions for a positive orientation. The development of training programmes in consultation with industry will encourage training and development of the workforce and ameliorate the negative attitudes towards training especially by the Private sector.

2.9.5 Private sector training

In the private sector, there is a skills gap in all member associations of Ghana Tourism Federation (GHATOF) that must be addressed strategically through training and education. The Ghana Tourism Federation (GHATOF), which is the umbrella body for the various Tourism Trade Associations, as listed in Appendix 2.7.1 does not have a structured training policy for its members.

a. **Private sector training issues**

Generally, the training of personnel in the private sector is the responsibility of HOTCATT and private training institutions. However, the myriad of challenges facing HOTCATT as enumerated earlier has made it virtually ineffective to fulfill its mandate and most private sector training institutions offer non-standardised programmes that are not nationally accredited. This situation has led to the uncoordinated and inappropriate human resource development for the tourism industry.

Currently, tourism training and education are being offered by some Universities, polytechnics and vocational schools (See Appendix 2.9.1). Existing data shows that the number of institutions offering skills and competency training courses in Hospitality and tourism far outstrips institutions offering supervisory programmes. The large chunk of Institutions offering hospitality and tourism programmes are in the private sector and often their motive for operations is clouded by financial gains to the detriment of providing appropriate facilities and engaging qualified teachers to deliver their programmes.

Thus, while these Institutions are turning out graduates every year there is still a gap between the demand and supply of well-trained tourism workforce. This can be attributed to factors such as low awareness level on career growth path, low remuneration which manifests in the migration of quality staff into other sectors of the economy resulting in high workforce turnover in the industry as well as the high cost of training. With the current tourism growth rate of 11 per cent, training of the workforce should be planned to sustain this growth rate if the sector must offer quality tourism products and services.

2.9.6 Tourism training institutions

Whilst there are numerous training institutions in the country, their programmes offerings are more theoretical with very little practical base. In order to streamline the training programmes modules and courses being offered by the private training Institutions, there is the need for a comprehensive policy framework for human resource development and management in the tourism industry.

Tourism and Hospitality training is currently offered by both public and private sector training Institutions. Whilst there are nine public universities, 44 private universities and ten polytechnics that have been accredited by the National Accreditation Board as at 2012, only four universities and seven polytechnics offer Tourism and or Hospitality training programmes. These institutions are listed in Appendix 2.9.1.

- The University of Cape Coast offers undergraduate, and postgraduate degrees up to the doctorate level.

- GIMPA runs an undergraduate hospitality management programme and it is the only institution offering Hospitality management training programme that has an application hotel for the practical training of its students. However, this facility is yet to be fully completed and operationalised to the benefit of the students, the nation and GIMPA.

- Polytechnics at Accra, Cape Coast, Ho, Kumasi and Takoradi offer a Higher National Diploma focused either on Catering, hospitality and tourism or a combination of these areas.

- The Hotel, Catering & Tourism Training Institute (HOTCATT) was established by the government in 1991 as an interim project to train hospitality and tourism workforce for the Non-Aligned Movement (NAM) conference. It was established with technical and financial assistance from the United Nations Development Programme (UNDP) to be developed into a fully-fledged Hospitality and Tourism training school offering accredited programmes after the project period of two years. However, since then, HOTCATT has never found its feet to deliver this objective. HOTCATT was intended to play a pivotal role in the development of the critical professional mass of hospitality and tourism industry workforce. The Institute has been offering training programmes that are not accredited by any national or external body. The main challenges of HOTCATT have been identified as inconsistent and incoherent policy direction from the MOT, coupled with lack of visionary leadership to head the Institution. In spite of these challenges, HOTCATT has contributed immensely in the training of the lower level workforce in the industry. The role of HOTCATT in addressing the challenges in the Human Resource development issues in the tourism industry in Ghana must be recognized and the needed attention given to the strategic development of the Institute. HOTCATT need to be restructured, given a legal status and supported through appropriate policies.

- **Poor quality of some private training institutions**

In the private sector, a number of training institutions offer certificates in tourism, hospitality and catering courses (an updated list could not be provided by appropriate agencies at the time of writing this report). These private training Institutions face challenges in the areas of quality instructors and standard facilities, standard curriculum and accreditation.

- **Lack of standards and certification**

The various reports, as illustrated in Table 26, which were consulted for this study made some findings which are still relevant and should be addressed by the stakeholders in the tourism industry. The observations include:

- Absence of a nationally accepted basic standards, curriculum and accreditation of Hospitality and Tourism training programmes in the country
- Inadequate coordination between policy makers and training providers
- Lack of Trainer of Trainer (TOT) training programmes and standards for the Hospitality and Tourism industry and lack of uniform training modules.

Over the years, these challenges have led to the production of a workforce that does not meet international quality standards. The absence of a national policy framework for developing the human resource needs of the tourism industry have created a field day for the mushrooming of Hospitality and Tourism training institutions and this has affected the quality of workforce and thus the service quality offered by industry

a. Programme certification

The existing training institutions in Hospitality and Tourism (especially the private sector ones) are plagued with inadequate training facilities, qualified and motivated staff. This has resulted in a number of training institutions that are operating without national accreditation. Only two Public Tertiary Institutions GIMPA and Cape Coast University and two private Institutions, Zenith College and Christ Apostolic University College, are accredited to offer Bachelor of Science in Tourism and or Hospitality Management. Of the ten Polytechnics in the country, it is only Ho and Takoradi Polytechnics that offer Bachelor of Technology in Hotel and Tourism management. Nine Polytechnics in Ghana offer HND programmes in either Hotel; Hotel & Tourism; Catering & Hotel; Catering Management. (See Appendix 2.9.1 for details of training institutions and their programme offerings). Though there is diversity in Hospitality and Tourism programmes being offered at the Polytechnics, their contents need to be standardised. Appendix 2.9.2 shows that in 2012, the number of students studying Hospitality and Tourism related programmes at Polytechnics in Ghana stood at 1,999; of which 12.6% (252) are male and 87.4% (1,747) are female. There is gender inequality in the number of students studying Hospitality and Tourism programmes at the Polytechnics and policies should be developed to improve on the gender disparity.

There are several Public and Private Institutions offering Hospitality and Tourism programmes at the certificate level. However, due to poor data collection, storage and retrieval systems at the various agencies in charge of these Institutions, data on the number of institutions offering Hospitality and Tourism programmes at the certificate level was not readily available at the time of writing this report. However, the standards of training and the certification of these institutions do not synchronise with the national tourism development objective due to challenges with quality of teaching staff and availability of modern demonstration facilities.

A number of Hospitality and Tourism Training Institutions in Ghana offering training programmes are affiliated to external examining bodies such as City and Guilds International, Education Institute of the American Hotel/Motel Association and the Institute of Commercial Management. Graduates from these institutions therefore take external examinations and are awarded international certificates. The challenge is that the institutions offering such programme do not provide the needed local context and content that the meet the national aspirations and needs.

- **Institutions not affiliated to accreditation bodies**

Those institutions that are not affiliated with any external bodies develop their own curricula and issue their own certificates to the detriment of industry standards.

- **Inadequate training facilities and limited qualified trainers**

The limited number of qualified staff and the lack of adequate training equipment and facilities critically undermine the quality of current training offerings in Hospitality and Tourism in Ghana. Current facilities in Hospitality and Tourism training institutions are woefully inappropriate, inadequate and do not promote effective training of the needed quantity and quality workforce required to deliver quality services. The lack of laboratories for practical training in all sectors of the Hospitality and Tourism industry hamper the development of the human resource capacity of the industry. Although most of the tertiary Institutions have an internship component to their training offering, the structure and monitoring mechanism for this component of training needs to be streamlined with the National Training Policy.

2.10 Tourism and the environment in Ghana

This section considers tourism's relationship with the environment in Ghana from the following angles:

- how environmental conditions in Ghana affect tourism
- how tourism affects the environment and the measures that could be taken to mitigate problems

2.10.1 The state of the environment in Ghana

The 1996-2010 Plan explained that Ghana faced 'several environmental problems as a result of some traditional socio-economic practices, modern efforts aimed at utilising the natural resource base for further economic advancement, the rapidly increasing urbanisation of the country, and general population pressure on use of resources'. It highlighted human activities that negatively impact on the environment to include 'inadequate disposal of solid and liquid wastes and related water pollution and sanitary problems, air pollution, unsustainable harvesting of forest resources, beach erosion, threats to wildlife, degradation of wetlands and land use and traffic problems'.

The Ghana Shared Growth and Development Agenda 2010-2013 (GSGDA) also states that over-population in urban areas has a direct bearing on human health in Ghana and notes:

- waste management problems and weakness in basic sanitation
- shortage of essential facilities
- disregard of approved land use allocations
- irreparable damage made to productive lands by deforestation, air and water pollution, desertification, overgrazing, and
- destruction of biodiversity

As a result of incessant exploitation of natural resources to meet legitimate socio-economic aspirations resources are being depleted. The following are in serious decline:

- forests, destroyed and exploited by business and communities
- wetlands, lost as business and industrial development pushing communities away from their traditional living areas such as on the coast of the Western Region
- sand from beaches, mined for construction contributing to coastal erosion
- mangroves, cut for fire wood
- natural areas, new sectors such as the oil and mining sectors looking for space to carry out their exploration, encroach on these areas and pollute water bodies

A World Bank Report[28] states that 'more than 50 per cent of the original forest area in Ghana has been converted to agricultural land by clearance for perennial or annual cropping and slash-and-burn cultivation practices. Crop yields have stagnated, and productivity has declined because of rampant soil erosion. Fish, timber, and non-

[28] World Bank, Agence Française Développement, Royal Netherlands Embassy, *Report No 36985-GH Ghana Country Environmental Analysis,* September 06, 2006, Environmentally and Socially Sustainable Development Department, Africa Region

timber forest product stocks are decreasing rapidly. Coastal towns are facing severe water shortages during the dry season. Wildlife populations and biodiversity are in serious decline. Health-related pollution - indoor and outdoor air pollution, and water and sanitation issues - have emerged as serious health threats for the majority of the population. All of these factors threaten to reduce Ghana's GDP growth in the near future' [29] . Global issues such as climate change are also affecting Ghana's environment. A UNDP report[30] indicates that the number of 'hot'[31] day in Ghana by 48 days annually (13.2%) and 'hot' nights by 73 (20%) between 1960 and 2003.

Sanitation is a major problem in Ghana. The World Economic Forum in its Travel and Tourism Competitiveness Index Report 2011 [32] measured 'Access to adequate sanitation' expressed as a percentage of the total population based on World Heath Statistics collected in 2010. Ghana was ranked 128 out of 139 countries (1 being the top ranking).

According to the GSGDA stress on the environment due to poor management and sanitation accounts for over 10 per cent of Ghana's GDP. The document points out that many efforts have been made to address environmental issues over the years including the ratification of a number of international conventions related to the environment but lack of knowledge on the environment by the wider society and a lack of progress to deal with management of the environment and sanitation issues have hampered progress. Recently, Government has established the Institute of Environment and Sanitation Studies at the University of Ghana to address the capacity need of the sector. It has ratified most of the international environmental treaties and Ghana is rank high at 46 out of 139 countries in the Travel and Tourism Competitiveness Index for 'Environmental treaty ratification'.

The GSGDA presents a set of strategic measures to be carried out during 2010-2013 to address key environmental objectives including:

- Improved cross-sectoral environmental management, in particular to tackle climate change
- Application of Strategic Environmental Assessment (SEA) – a decision-making tool to ensure that environmental aspects are considered effectively in policies and plans
- Improved Social and Environmental Impact Assessment processes and compliance
- Decentralised environmental management, including the enforcement of laws on waste, illegal mining and chain-saw logging at the local level
- Improved environmental monitoring and reporting
- Strengthened functional partnership and participation in environmental management with civil society, development partners, industry, and research bodies.

To achieve these objectives, the Ministry of the Environment, Science and Technology (MEST) launched a new National Environmental Policy in November

[29] World Bank, Agence Française Développement, Royal Netherlands Embassy, *Report No 36985-GH Ghana Country Environmental Analysis,* September 06, 2006, Environmentally and Socially Sustainable Development Department, Africa Region

[30] McSweeney C., New M. and Lizcano G. (2012) *UNDP Climate Change Country Profiles – Ghana,* UNDP, http://www.geog.ox.ac.uk/research/climate/projects/undp-cp/

[31] 'Hot' day or 'hot' night is defined by the temperature exceeded on 10% of days or nights in current climate of that region and season.

[32] World Economic Forum (2011) *The Travel & Tourism Competitiveness Report 2011 – Beyond the Downturn,* Geneva, Switzerland

2012. This replaces the 1992 Policy, which was driven by respect for all relevant principles of environment and sustainable development. It was felt that although these principles were being championed by the Environmental Protection Agency, the main challenge faced was ineffective enforcement of the policies and laws that exist. According the Ministry, the new policy 'attempts to restructure and redirect the implementation strategy to achieve the desired result'[33].

The policy is comprehensive, setting out policy goals, objectives and strategies to address major environmental challenges identified under the following themes:

- Natural resources management
- Socio-cultural issues
- Economic issues
- Institutional dimensions

To guide government action on environmental management over the next ten years the policy will focus on:

- encouraging sustainable consumption and production
- improving the effectiveness of the institutional and legal framework
- promoting sustainable resource use and impact management
- ensuring that environmental considerations are adequately integrated into all government policies, programmes and projects
- involving and enhancing participation and coordination in environmental governance of other institutions, the private sector and the population
- promoting environmental awareness creation and empowerment through environmental education, training and communication
- increasing access and use of environmental information for decision-making
- enhancing international cooperation and implement multilateral environmental agreements

The document identifies key sectoral and cross-cutting policies that will control and guide of each sector to develop and operate in a sustainable manner such as land policy, transport policy, water policy, environmental education, training and awareness, pollution prevention and control and so on.

It recognises that 'the development of the tourism sector is also associated with serious environmental impacts on fragile ecosystems such as beaches, mangroves, and so on but also that the policy concerning tourism is to 'promote sustainable and responsible tourism in such a way to preserve historical, cultural and natural heritage'.

2.10.2 Tourism and the environment in Ghana

Nature and culture are pillars of the tourism product and often the main pull factors for tourists to visit a country. Therefore, protecting the natural and cultural bases is vital to the quality of tourism. With its 18 wildlife-protected areas (including 5 coastal Ramsar sites and 4 wildlife sanctuaries) Ghana benefits from good environmental protection and conservation within its designated areas. The role of the Wildlife Division of the Forestry Commission is primarily wildlife protection and habitat/resource conservation for the sustainable benefits of present and future

[33] Ministry of Environment, Science and Technology, *National Environment Policy, Executive Study*, 2012, Ghana

generations.

The World Economic Forum's Travel and Tourism Competitiveness Report 2011, rates Ghana relatively high for overall 'Environmental sustainability' in terms of its regulatory framework (47 out of 139 countries) and in terms of its 'Natural Resources' (57 out of 139 countries), scoring high in particular for its 'Protected areas' (48) but more modestly for the 'Quality of the natural environment' (75).

The environmental quality of areas and facilities used by tourists directly affects the quality of the tourism product. Visitors who come for beach holidays expect clean and sanitary beaches that have not been damaged by coastal erosion. They want to see historical buildings that are well maintained, easy to access and properly interpreted.

On the other hand tourism development causes environmental problems that damage the nature base and affect the quality of life of local residents.

The 1996-2010 Plan explained that existing tourism development in Ghana was damaging the environment. It identified:

- inadequate sewage waste disposal with resultant surface and ground water pollution
- improper human waste disposal in and near some attraction site
- littering at some attraction features
- poor siting and design of some tourist facilities; and
- poaching of animals and plants, removal of trees and agricultural encroachment in national parks and reserves by local residents

It warned that potential tourism areas, including Lake Bosumtwi and the Volta Estuary were particularly environmentally fragile and required careful integrated planning before development takes place and recommended the need to carry out environmental planning of tourism areas before development so that environmental problems are prevented from taking place. In its associated reports it provided sets of guidelines for:

- Natural attraction features including the protected areas of national parks and reserves, and waterfalls, scenic areas and other natural features not in protected areas.

- Historic and archaeological sites including urban historic districts.

- Beach and lake resorts, hotels and other types of tourist facilities[34].

These recommendations of course are still valid and fully endorsed in this Mater Plan.

- **Environmental management at tourist sites is weak**

Although there have clearly been some improvements since 1996 such as effective environmental protection by the Wildlife Division in National Parks, Reserves and Sanctuaries visited by tourists and projects to address issues such as beach erosion, water management and so on, there are many on-going issues that remain to be

[34] National Tourism Development Plan for Ghana, 1996-2010

resolved, as observed during the field visits (see Project Profiles in Appendix 5.3.1 for some examples). The following issues were noted:

- littering, pollution and environmental degradation at certain sites and areas popular with tourists
- poor waste management by tourist firms
- deteriorated and poorly maintained historical buildings
- depletion of natural resources at tourist areas such as extracting sand from the beaches and cutting mangroves and forests
- overcrowding at popular sites

Environmental damage is generally caused by local communities living near the beaches, forests and inland tourism attractions, by poor management of tourism enterprises operating in these areas, by tourists not respecting local rules and regulations and by development from other economic sectors, in particular the oil and gas and the mining sectors.

- **Prohibited activities such as illegal mining, cutting of mangroves and sand winning are damaging the environment in tourist areas**

Over the years, there has been much awareness building with the local population and to a lesser extent with tourism enterprises by the Government and by NGOs as the examples in Section 2.10.3 indicate. It is clear that this has to be a continuous process and the MOT and GTA should support and participate in these initiatives.

- **The District Assemblies need to provide waste management facilities and enforce regulations in their areas**

Sanitation and waste management require infrastructure such as landfills, treatment centres and sewerage, which is often lacking in rural and urban areas. The lack of waste management facilities is a major problem. As a consequence, illegal dumping of waste both on land and in the sea is a regular occurrence, including by tourism firms. A major constraint hampering the Metropolitan, Municipal and District Assemblies (MMDAs) to provide these facilities is the acquisition of land to build landfills and treatment centres. Often traditional rulers control land and they are not willing to allow landfills or treatment plants in their area. MMDDAs need to enforce environmental regulations that are prescribed by law and if possible extend services to tourism firms to assist them to follow the regulations

2.10.3 Coastal management and tourism in Ghana - Case study: The COAST project and the Ada Demonstration Site[35]

The Collaborative Actions for Sustainable Tourism (COAST) project is part of the Global Environment Facility (GEF), funded programme executed by the United Nations World Tourism Organization (UNWTO) and United Nations Industrial Development Organisation (UNIDO), which aims to support and enhance the conservation of globally significant coastal and marine ecosystems and associated biodiversity in sub-Saharan Africa, through the reduction of the negative environmental impacts which may be caused as a result of coastal tourism. Nine countries were involved in the project and one or more demonstration sites were set up in each country to study the environmental impact of tourism on the ground and

[35] COAST Governance and Management Study – Ghana Country Report for the UNWTO – UNIDO Study on Mechanisms for Sustainable Tourism Governance and Management in Coastal Areas

the governance and management in place in the country to address these impacts. Ghana has been selected as one of the countries in the project and the demonstration site is located at Ada and its environs, near the estuary of the Volta River. A UNWTO ST-EP project was launched in Ada and is described in greater detail in Section 2.11.4.

The COAST project focuses on the coverage of policy, regulations and other management mechanisms, but also identifies barriers to their effective implementation.

The report explained that:

> *'Much of the coastline, and notably in the demo area, is subject to rapid erosion, as a result of natural processes but also activities such as sand mining. There has been heavy loss of mangroves and wetlands, which continue to be threatened from cutting, pollution and development. Many coastal sites are dirty and insanitary, with high levels of strewn solid waste, partly as a result of the activities of local communities living near the beaches'.*

Tourism development and activities associated with tourism itself are also causing pollution. The concern is the impact of coastal environmental problems in general on future tourism potential.

Whist there have been several studies conducted in the past on coastal management in Ghana, there is no recognisable Integrated Coastal Zone Management process, strategy or plan for Ghana's coast. However, the Town and Country Planning Department (TCPD) is now preparing strategic structure plans at the regional level which are translated into more detailed district level plans and land use plans to guide the development process. It has formulated these plans in a few areas, such as Dangme West District in Greater Accra Region, Awutu-Senya District in the Central Region, Ahanta West and Wassa Amenfi Districts in the Western Region, Ejisu-Juaben Municipality in Ashanti Region and Savelugu-Nanton District in the Northern Region and intends to extend the project to the rest of the coast.

The COAST project in Ghana identified some positive environmental initiatives and activities in the Ada I area, namely:

- Projects to address sea defences, beach erosion, habitat conservation, water management in estuaries and lagoons, with consequent benefits for tourism
- In Ada, the estuary is being dredged by the Volta River Authority
- Also in Ada work is being carried out with local communities on mangrove and habitat restoration
- Various initiatives have sought to benefit conservation through education and awareness raising. The Ministry of Environment has worked with youth programmes on tree planting schemes. Education programmes have been run on sand extraction
- Six private sector resorts in Ghana West Coast have initiated a turtle protection programmes
- There are a number of waste management and beach cleaning scheme along the coast such as the Zoom Lion programme, which involves organised youth teams. However, problems continue to persist, exacerbated by poor waste disposal processes
- The Ministry of Tourism is implementing the ecotourism component of the

Coast Project. To date, 115 local people have been trained comprising:

- local people working in hotels, restaurants, vegetable growers and food vending; tour guides; and boat operators.
- Sugar framers, gin producers are expected to be trained and 'selling point' constructed for local people to sell artefacts.

The COAST Ghana study concluded that:

> *'the principles of sustainable tourism are well understood in Ghana. The policy framework is sound, stemming closely from the national policy for sustainable development and poverty reduction. Tourism and environmental policies are in harmony and recognise the important link between the two areas. While there is no need to alter the main policies, the lack of a current recognisable integrated coastal zone management strategy or coordinating structure is a gap to be filled*'.

The main suggestions to strengthen governance and management processes for sustainable coastal tourism were:

- Strengthen inter-ministerial and public-private liaison structures
- Produce a position statement on sustainable coastal tourism
- Establish an Integrated Coastal Zone Management structure and plan
- Clarify roles and structures of Regions, Destination Management Organisations (DMO) and District Assemblies in delivering sustainable tourism
- Prepare a template for District tourism plans and their implementation, covering content and process and taking account of coastal issues
- Strengthen capacity and resources at the local level to deliver sustainable tourism
- Further develop the guidelines on EIA requirements for tourism, taking account of the coast
- Work with Ghana Tourism Federation (GHATOF), Ghana Hotel Association (GHA), Tour Operators Union of Ghana (TOUGHA) and other stakeholders to establish responsible operational standards for tourism enterprises, which link to advisory services, environmental audit and rating requirements
- Strengthen coordination and capacity of inspection processes
- Strengthen work with coastal communities on awareness raising, skills training and environmental improvement

2.10.4 Environmental Impact Assessment (EIA) for tourism enterprises

The Environmental Protection Agency (EPA) is responsible for implementing the environmental policy. It is also charged with applying 'the legal processes in a fair, equitable manner to ensure responsible environmental behaviour in the country'[36]. The Environmental Assessment Regulations, LI 1652 was promulgated in 1999 and provides the legal cover for Environmental Impact Assessment. In 2011, guidelines were published by the EPA for environmental assessment in the tourism sector to 'provide the framework for environmental accounting right from the planning to implementation stages of tourism development programmes and activities'[37].

[36] Environmental Protection Agency website: http://www.epa.gov.gh/index.php?option=com_content&view=article&id=46&Itemid=109

[37] Environmental Protection Agency *Environmental Impact Assessment, Guidelines for the Tourism Sector,* September 2011

In 1996, the EIA was already a requirement for tourism development projects that have an impact on the environment. At the time, hotels of more the 40 rooms were required to undergo an initial and regular assessment and report the impact of their operation on the environment. The 1996-2010 Plan recommended lowering the requirement to include accommodation with 20 rooms and above.

The current regulations define three categories of tourism enterprises based on their size, their level of tourism activities and their potential adverse impact on the environment and the socio-cultural life of the people. These are:

Category A: The activities of the enterprise have no significant adverse impacts and are permitted to operate without further environmental assessment

Enterprises in this category are required to register their business with the EPA. They do not have to undergo further environmental assessment but must complete an annual report. This applied to enterprises that are not located in sensitive areas as defined by LI 1652 (See Appendix 2.10.1 for a list of sensitive area). This category includes accommodation units not exceeding 20 rooms, catering establishments with seating capacity of 50 persons, camping sites with visitor receptor capacity not exceeding 20 persons, sports areas not exceeding 1 hectare, and botanical gardens with area coverage not exceeding 5 hectares.

Category B: The activities of the enterprise are deemed to have significant adverse impacts that can easily be predicted and mitigated. It is subject to a preliminary environmental assessment

Establishments in this category must complete a Preliminary Environmental Assessment (PEA), which provides the essential details of the proposed project (for example project duration, location, and the nature and scale of activities) and additional information such as how they will manage solid and liquid waste, the impact of their operation on traffic and so on.

Included in this category are accommodation units with between 20 and 39 rooms; resorts; facilities located with direct access to the beach or within 200 metres from the shoreline of a river; facilities located on hill slopes with gradients above 45 degrees and prone to erosion, rock fall, mudslide or landslide; catering establishments located in sensitive areas with seating capacity not exceeding 50 persons; nightclubs with seating capacity not exceeding 200 people and not located within 1,000 metres from a residential area; amusement and recreational establishments such as theme parks, golf courses, go-karting circuits, zoological gardens, horse racing tracks, gambling casinos with seating exceeding 50 people, sports hunting, sports fishing, and speed boating and surfing with facilities exceeding 20 motorised boats not located in fish spawning or nursery grounds.

Category C: The activities of the enterprise have significant adverse impacts that cannot be easily be predicted and mitigated. It is subject to a comprehensive environmental impact assessment.

A comprehensive environmental impact assessment provides pertinent environmental information to help the EPA decide whether to allow a project to proceed. It presents detailed information on the location and size of the project, the nature of the proposed operation, the types of activities that will be carried out, the number of staff, the average visitor capacity per day, the size and type of construction, the surface area covered by the facility, distance to residential areas and adjacent land-use, the infrastructure and utility requirements, the source and quantity of water used, the type and quantity of power used, the access roads and baseline information such as climate, geology, air quality, and water bodies. The environmental impacts of the project during the construction and operational phases must be declared as well as the socio-economic / socio-cultural impacts on stakeholder communities and neighbours. Mitigation, enhancement and management measures must be described and a monitoring plan submitted.

Accommodation units with 40 rooms and above and accommodation, resorts and recreational facilities in sensitive areas must complete the full EIA as well as projects involving certain activities such as safaris, mountain climbing, excavation of archaeological sites, sky rails and cable cars, horse and race tracks in built-up areas, trails for motorised recreational vehicles, aviation sports and sports fishing in fish spawning and nursery grounds.

These enterprises are also required to submit an Environmental Management Plan every 3 years to obtain their Environment Certificate.

There are certain circumstances where a development project will be prohibited. According to the guidelines:

- No resort shall be established within 20 metres from the high tide mark of the coastal shoreline
- No resort/accommodation/amusement and recreational facility shall be established within 1,000 metres (1km) of a watershed and waterfall
- No outdoor firing/shooting range shall be established within 1,000 metres of a built-up area or national park/biosphere reserve
- No marina shall be established within a fish spawning/nursery ground
- No tourist facility shall be established within 1km of an area designated or known to be prone to landslides
- No tourist facility shall be established in an area prone to earthquakes such as fault lines

The EPA document on the tourism sector also provides recommendations on how to conduct an EIA and how to prepare an Environmental Management Plan (EMP) for tourism activities. It presents criteria for determining the significance of impacts of specific activities in the tourism sector and guidelines for the mitigation of impact to help the planners develop their projects with built in sustainability factors.

- **EIA compliance is low in the tourism sector and should be enforced by EPA with the support of GTA, Town and Country Planning Department, and MMDAs**

EIA requirements in Ghana are comprehensive and clearly presented. Unfortunately, enforcement of the regulation has been difficult over the years, hence the need for a new Environmental Policy which emphasises an implementation strategy to achieve desired results.

The EPA is planning to launch the ‘AKOBEN’ Programme for hotels in 2013, an Environmental Performance Rating and Disclosure scheme, which assesses the environmental performance of hotels. The programme puts the principles of environmental transparency into practice by disclosing the ratings of each hotel that has been assessed. The assessment will be based on five ratings as shown in Table 27:

Table 27: 'AKOBEN' rating scale for hotels

Rating level	Performance	General description
RED	POOR	Has not fulfilled the requirements of LI 1652, and creates risks from toxics and hazardous wastes mismanagement and discharges
ORANGE	UNSATISFACTORY	Exceedance of regulatory standards for conventional pollutants, non-toxics and noise pollution
BLUE	GOOD	Adequate compliance with environmental standards
GREEN	VERY GOOD	BLUE + company is responsive to public complaints
GOLD	EXCELLENT	GREEN + company follows its corporate social responsibility policies

Source: EPA, AKOBEN Programme

This policy tool is designed to encourage better environmental performance from hotels in the sector by publically disclosing the rating that they have achieved – in other words: 'naming and shaming' firms that are not operating in a sustainable manner. However, a poor rating will not automatically trigger sanctions. The EPA just issues a warning and publicises the results. To be effective, the scheme should allow the EPA to oblige the worst offenders to improve their operation, The EPA must be empowered through Act of Parliament to tackle all environmental issues including closing down businesses which seem to be detrimental to the environment, and subsequently to health.

The rating criteria are currently being prepared for the assessment of hotels. It was not clear at the time of the drafting of this Master Plan if criteria will also be developed for other types of tourism enterprises.

2.10.5 The impact of oil and gas exploration and mining on the tourism sector in Ghana must be clearly understood

The economic boom that will be brought from the discovery and exploitation of oil and gas in Ghana will certainly bring a lot of benefits for the country and its people, generate income and jobs and contribute to raising living standards. However, along with mining, oil and gas exploration and exploitation will certainly have an impact on the environment. Impact studies have of course been carried out and the Government through its Ministries has been monitoring developments.

However the impact on the tourism sector has not been studied. Given its proximity to the oil fields and to a lesser extent the gold mines, tourism on the coast of the Western Region, which is mainly based on beach resorts, supported by nature assets such wetlands, forest reserves, rivers and lagoons as well as cultural attractions, will be the most affected by industrial development in the area.

One the one hand, increased numbers of visitors to the zone may provide greater business opportunities for existing tourism enterprises as well as local communities and may encourage further tourism development. On the other hand, industrial development may damage the tourism assets of the area and the nature of tourism development may change to the detriment of established enterprises.

Big business operating in tourist areas and encroaching on the environment and on tourist sites must be made aware of the impact of their activities and made to compensate by supporting initiatives to protect the environment and by contributing to the development of the tourism sector.

- **An impact study of oil exploration and exploitation and of mining activities on the tourism sector needs to be conducted and social responsibility of large firms from other sectors must be encouraged**

2.11 Community involvement in tourism

Ghana has a relatively long history of local community tourism initiatives, the majority started-up with the assistance of foreign NGOs. In the early 1990s, USAID, the US Peace Corps and SNV initiated several ecotourism and community-based tourism activities, especially around the Cape Coast area and the Kakum National Park. Nature Conservation Resource Centre (NCRC), an environmental and nature conservation NGO, started developing and promoting ecotourism and set up the Ghana Rural Ecotourism and Travel Office (GREET) in 2008.

In recent years, the UNWTO ST-EP programme has worked with NGOs in two areas of Ghana: in the Western Region on the coastal strip and in the Northern Region around the Mole National Park. The project in the Western Region was implemented by the NGO Ricerca e Cooperazione (RC). The NGOs A Rocha and SNV implemented the project around the Mole National Park.

The work that has been carried out to develop community tourism has taken various forms including:

- assisting local communities to provide direct services to tourists when they visit their areas by for instance by establishing Tourist Information Centres run by the local communities
- providing micro-finance opportunities to enable local communities to set up small businesses to supply the tourism sector thus developing economic linkages and strengthening local value chains for instance to help them supply hotels and guest houses with fish on a regular basis
- supplying tourists directly with related goods and services by for example setting up a system whereby the local community can provide guiding services or boat rides
- providing a marketing and reservation services for community-based initiatives for example featuring community-based initiatives on websites, in brochures and handling bookings and reservations on their behalf

This section provides a brief description of some of the successful initiatives in Ghana.

2.11.1 Marketing and accrediting community-based tourism: the case of Ghana Rural Ecotourism and Travel Office (GREET)

The Ghana Rural Ecotourism and Travel Office GREET was set up by the Nature Conservation Research Centre (NCRC) to support a community-based ecotourism model developed by NCRC and to provide technical support to ecotourism sites run by local communities.

- A USAID-funded programme originally developed many of these sites. Between 2002 and 2004 USAID invested USD 7 million in the Government of Ghana’s Village Infrastructure Projects and Poverty Alleviation Initiatives and established the ‘Community-Based Ecotourism Project’. The objectives were community development and poverty alleviation through tourism development. Working with partner organisations such as NCRC and the Peace Corp who acted as tourism advisors, USAID supported 14 community-based ecotourism destinations by enhancing their facilities and providing technical assistance, marketing and promoting the sites, organising training, building institutional capacity, and enhancing community awareness about protecting the resource base (for a list of the sites see Appendix 2.11.1; for a brief description see the GTA Website: http://www.touringghana.com/documents/community_based_ecotourism.pdf).

- As project partners, NCRC and the Peace Corp worked to build greater levels of income for the local community and to create jobs. The model is based on local communities retaining local ownership and developing tourism themselves. The project was quite successful and generated a lot of income. According to USAID project final report: 'the project achieved its overall target of 20,000 visitor days by the end of year one, closing at 22,590. Revenue generated by December 31, 2002 was GH¢383,936,000 [in old currency], and total project revenue as at March 30, 2004 stood at GH¢1,143,045,700 [in old currency] which represents 13% above the revenue target set'[38].

- After UDAID completed its project NCRC continued working with the community in developing and promoting ecotourism activities at 32 ecotourism destinations around Ghana including Wechiau Hippo Sanctuary[39], Avu Lagoon, Boabeng-Fiema Monkey Sanctuary, Nyankamba Escarpment, Tafi Atome Monkey Sanctuary, Asumura and the Afram Arm of Lake Volta.

  In 2008 NCRC formed a separate entity, GREET, to take over the role of promoting the ecotourism sites.

- The tourism initiative at Wli Water Falls is a good example of a community project that was developed by the community, later supported by NCRC and is now marketed by GREET. Established in 1997 by the Hohoe District Assembly, it brought together villagers from four communities (Afegame, Agorviefe, Todzi, and one settler community Dzogbega), which formed a Tourism Management Authority to derive benefits from the natural attractions for the well-being of its citizens. Today this ecotourism destination is still well managed by the local community through a management committee and attracting a substantial number of visitors, over 30,000 in 2011. It is the most visited attraction in the Volta region and a tourist economy has gradually developed locally with guesthouses and homestays (18 in the surrounding villages offering 43 beds), restaurants and souvenir shops.

- The Ghana Tourist Board mandated GREET to set up standards for the sites to achieve and abide by. It developed an accreditation system for the sites to apply for membership of GREET. The benefits of membership include marketing and technical assistance. Today 22 sites have been vetted and accredited (see Appendix 2.11.1).

GREET's role is to:

- Provide up-to-date information on rural ecotourism destinations to tourists and potential investors
- Market and promote collaborating rural ecotourism destinations
- Build partnerships among communities, private investors, government and non-governmental agencies, thereby supporting the mediation, negotiation and brokering needs of such partnerships
- Network and serve as a central help desk for communities through lobbying, advocacy and provision of advice

[38] USAID (2004) *Final Report: Community-Based Ecotourism Project,* April 2004
[39] Wechiau Community Hippo Sanctuary website: http://www.ghanahippos.com/index.html

- Vet and accredit agreed ecotourism standards for rural ecotourism destinations and tour operators utilising these destinations
- Collect and analyse sub-sector data on agreed indicators for rural tourism destinations

GREET runs a website to promote the ecotourism destinations[40], publishes and sells a comprehensive brochure which describes each site, the attractions and the facilities, organises trips for tourists and provides a booking service.

- **Government's promise to support GREET financially not fulfilled**

The organisation's work and influence were recognised by the government, which sits on the oversight committee of GREET (its steering committee). A Memorandum of Understanding (MOU) was signed February 2008 with the Ministry of Tourism and Diasporan Relations, the Ghana Tourist Board and several other organisations to support GREET and its work. The Ministry and GTB were to support the staffing and structural (office space) needs of the GREET office. Rent would be covered and GREET were to eventually move into the new Visitor Centre being constructed in Accra.

Help with payment of rent was extended in 2010 and GTB provided two officers to be based at GREET's offices and work along side its staff. However, with the change of leadership at GTB (now GTA) rent payment stopped and one of the GTA officers was recalled to head office and it is expected that the second will soon follow. GREET has been given temporary office space at NCRC headquarters. Without financial assistance there is a real threat that this important support to local community tourism initiatives, especially in the field of marketing, which local communities neither have the expertise, reach or funds to carry out, will be forced to close down.

2.11.2 UNWTO ST-EP Programme and Ricerca e Cooperazione (RC) community tourism activities in Ghana West Coast (GWC)

Ricerca e Cooperazione has been active in the southern part of the Western Region since 1996 working in all the four districts on water, sanitation, agriculture and integrated coastal zone management projects with funding from the European Commission, CARITAS and the French Development Bank.

A partnership was formed between UNWTO and RC in late 2006 under the ST-EP programme with the sponsorship of the Italian Ministry of Foreign Affairs. Three projects were carried out under this partnership.

The first project was entitled 'Development of Eco-cultural Tourism at Butre and Dixcove for Sustainable Livelihoods, Natural Resources Conservation and Management' and was for an initial duration of 18-months. The objective of this project was poverty reduction in the coastal communities of the Western Region of Ghana. The specific project outputs were to:

- formulate standards and guidelines for eco-cultural tourism development
- build the capacity of local actors to manage cultural and natural resources
- provide direct support to eco-cultural tourism enterprises in the project area
- promote and market the enterprises

[40] GREET's Website: http://www.ghanaecotourism.org/

- communicate the achievements and the lessons learnt from the project to inform the national and international debate on eco-cultural tourism

The project was able to formulate standards and guidelines for tourism enterprises on hygiene, sanitation, and business registration. It trained 21 Town Tourism Development Committees (TTDC) and 13 tour guides in the project area providing them with basic facilities (identity cards, T-shirts, caps, office space, registration books, telephones, invoices and receipts, and stamps) to enable them to work effectively. Capacity building covered business and financial administration, governance and principles and ethics of tour guiding.

In addition 13 micro-enterprises were supported by the project and instructed in the drafting of business plans. These included four homestays – two in Butre, one in Busua and one in Dixcove; two vegetable farms at Busua; a bicycle rental at Busua; an arts and crafts shops in Busua; a bakery in Busua; three fish suppliers at Dixcove; and ice block production at Dixcove. Two Community-Based Tourism Enterprises (CBTE) were developed in Butre and in Dixcove. In Butre the enterprise offers canoe paddling on the lagoon, tours to the fort, and visits to local attractions. In Dixcove the enterprise provides visits to local attractions and bird watching.

The Ghana West Coast website was created for the three communities as well as a logo, posters and brochures. A workshop was organised to discuss and share the lessons learned. As a result, the local community felt empowered, took ownership of the initiatives in their area and welcomed further assistance to develop the tourism economy.

Based on the success of the first phase of the ST-EP project, a second project was conducted entitled 'Development of Local Market Linkages in the Tourism Supply Chain and Community-based Tourism Enterprises Capacity for Poverty Reduction in Ghana' in seven communities of Ghana West Coast (including Butre, Busua, Dixcove, Akwidaa, Cape Three Points, Miamia and Axim). The project started in April 2008 and ended in April 2010.

The overall objective of the project was to reduce poverty in the coast communities of Ghana by adopting pro-poor tourism approaches. Specifically the project sought to:

- Develop Community-based Tourism Enterprises (CBTE), Micro and Small and Medium Sized Enterprises (MSME) and local market linkages in the tourism supply chain in the Western Region of Ghana
- Build, strengthen and network for pro-poor tourism in Ghana
- Improve capacity of local actors to manage in a sustainable manner the natural and cultural resources

Eighty MSMEs received training on business and financial administration and were supported by the project with inputs such as credit, equipment, cash, and other logistics. Seven TTDC comprising 49 members were established and trained. A revolving micro-financing fund was created to stimulate business development at the community-level. Environmental and sanitation education was organised in all the seven communities.

The Ghana West Coast website was expanded to include the additional communities as well as other marketing collaterals. The logo was redesigned to reflect the wider area. The new website was officially launched in July 2010:
(http://www.ghanawestcoast.com/gwc/).

In 2007, SNV took the initiative to bring the stakeholders of the Western Region together to create a tourism management structure. The first task was to define the Destination Management Area (DMA) and the West Coast area was selected. A steering committee was set up and comprised a mix of public sector institutions, private sector operators and NGOs. This initiative was noted at national level.

➢ **The Tourism Sector Medium-Term Development Plan 2010–2013 committed to replicate the DMA concept in other areas of Ghana**

One of the commitments of the Tourism Sector Medium-Term Development Plan 2010-2013 was:

> *'Pilots on-going programmes in the Destination Management Area in the Ahanta West Districts will be replicated with the collaboration of SNV, RICERCA COOPERAZIONE and other NGO's[41]'*

To date, only one other DMA/DMO initiative has been set up at Mole National Park with the surrounding communities, also funded by a UNWTO ST-EP project (see Section 2.11.3).

In 2010, a third one-year project was initiated by RC with its partners GTB and SNV, funded by UNWTO/ST-EP/Italian Ministry of Foreign Affairs to support the development of the Destination Management Organisation (DMO) and to strengthen the positioning of GWC in the national and international arena[42]. UNWTO and RC recruited a consultant to set up the DMO and a UNWTO volunteer spent 11 months working with the communities, setting up several features for the DMO such as a newsletter[43], a facebook page and a twitter account[44], and drafting a tourism investment promotion brochure for the area.

The DMO brings together the stakeholders in the DMA and is private sector led with an elected chairman, currently a prominent businessman in the local tourism sector. The DMO is a legally register entity which can apply as an organisation for funding. In 2011, the GWC DMO received the Parliamentary Select Committee on Tourism, which was touring the country, and by all accounts the members were impressed with way tourism is organised in the West Coast.

The following results were achieved by the project:

- Development of Ghana West Coast Destination Management Strategy and Plan over a 10-year period with a 3 year Action Plan
- Strengthening the capacity of the Western Regional office of the Ghana Tourist Board with equipment and training in order to be able to operate as host of the DMO.
- Support to the activities of the Destination Management Organisation by providing technical advice and facilitating meetings to discuss the DMO institutional structure and by organising a workshop with DMO members to discuss funding options as well as other related issues

[41] Ministry of Tourism (2010) Tourism Sector Medium-Term Development Plan, 2010-2013, Government of Ghana
[42] UNWTO and RC (2010) *Tourism Marketing and Product Development Strategy for Ghana West Coast* UNWTO ST-EP Programme
[43] GWC newsletter: http://www.ghanawestcoast.com/gwc/newsletter-December.php
[44] Facebook: http://www.facebook.com/pages/Ghana-West-Coast/131310330227520
Twitter: https://twitter.com/GWESTCOAST

- Development and strengthening of business linkages between the private sector and local communities and MSMEs by for example arranging training on business and financial administration
- Preparation and publication of a document showing investment opportunities in the tourism sector

Local community stakeholders have developed other initiatives under the GWC DMO label such as Ghana West Coast Mountain Biking, which was set up after a successful event in February 2011. Regular events are planned and a website[45] has been launched with details of the trails that can be covered and bikes that can be hired.

- **A funding mechanism to finance the staffing and activities of the DMO is required if these initiatives are going to survive**

The DMO as an association is working and meeting on a fairly regular basis. Local area partnerships (groupings of stakeholders by geographical location) have been formed because GWC is 120km long so attending meetings in Takoradi is not easy for all stakeholders. The DMO has recently elected a chairman from the private sector. However, funding is needed to employ dedicated staff to work for the DMO, market GWC, develop new products and organise events, represent the DMO at fairs and official functions, and lobby when required to put forward the members views and request. Stakeholders have yet to be convinced that the DMO is worth supporting financial and want to see concrete results before agreeing to pay fees to fund the organisation out of their own budgets. A follow-up UNWTO mission in 2011 proposed a number of funding options to explore during a one-week workshop with stakeholders.

2.11.3 UNWTO ST-EP Programme, SNV and the Savannaland DMO, Northern Ghana

SNV has been working with local communities around the Mole National Park since 2006. It partnered with the GTB regional office in Tamale, the Mole National Park management and other stakeholders to develop a circuit of community tourism initiatives that would attract tourists visiting the park, create employment, generate income for the local population and increase visitor spend by involving the local population in tourism related activities.

Linking the attractions in the circuit evolved into developing a Destination Management Area approach bringing together stakeholders and attractions within the wider Mole NP area for the purposes of planning, product development, marketing, service provision and management. The DMA became known as the Savannaland. A DMO was formed with the following stakeholders: GTB, the Regional Coordinating Council (RCC), Mole NP, District Assemblies, SNV, NCRC, the international nature conservation organisation A Rocha, the rural local community organisation from the village of RUSODEF, US Peace Corp and UNWTO. Funding to support the DMO was secured through the UNWTO ST-EP programme.

To date the private sector has had little involvement with the DMO, a situation that should be rectified if the DMO is to survive financially and community tourism is to be supported and promoted by private sector stakeholders.

[45] GWC Mountain biking: http://www.ghanawestcoastmountainbiking.com/index.html

Savannaland has got a good website created through the project[46]. It describes the activities that can be enjoyed in the area, where to go suggesting itineraries and provides general information on the attractions in area.

There should be information about all the activities that are available in Savannaland at every hotel and guesthouse as far as Tamale, even posters at the airport and leaflets at the airport. It was disappointing to note by the project team that there was only an old leaflet at the reception of the Mole Motel describing community activities in the surrounding villages, no leaflets in the room, posters or other publicity.

A Destination Management Team (DMT) has been set up and mandated by the Regional Coordinating Council to provide overall direction in the development of the destination and to oversee the facilitation, implementation and sustainability of tourism initiatives within the area.

SNV provided the fund and technical assistance in marketing, product development and institution building through an appointed project management team. SNV provided technical support to the DMT and to the ST-EP programme, training, coaching and feedback.

The project has had some success as it has galvanized local stakeholders to work together and villages such as Mognori have benefited substantially for the work that has been carried out through the project. However, the project is still largely dependent on funding and technical support from the international NGOs. SNV has since pull out of tourism as a sector and the ST-EP project is currently on hold.

- **There is a need to source operational and development funds for the DMO and to get more involvement from the private sector**

2.11.4 Ghana Wildlife Society

The Ghana Wildlife Society (GWS) is a national environmental NGO that focuses on Education and Public Awareness, Development and Conservation projects throughout Ghana. In the Western Region its mandate is to conserve the Amansuri wetlands and ensure low-impact resource use based on the principles of sustainable management. It has been involved with the management of the Amansuri Wetland since 2000 implementing the Amansuri Conservation and Integrated Development (ACID) project. GWS adopted ecotourism as a strategy and developed a number of products, some with other NGOs such as COSPE (the Italian NGO Cooperazione per lo Sviluppo dei Paesi Emergenti), operated by the local community based on several attractions in the area. Its activities support:

- visits to the Nzulezo village on stilts
- sea cruise experience
- Meandah trail - forest walk, bird and crocodile watching
- the restoration of Fort Apollonia and the construction of a museum
- Ebonloa - nature trail, bird watching, village walk, boat trip to local distilleries built on a creek
- Bakanta boat trip - bird watching (bird sanctuary at the Amansuri estuary); and the
- Crocodile pond at Baku (under exploration)

[46] Savannaland website: http://www.savannatourism.com/

GWS is working directly with the community, providing capacity building, managing visits to Nzulezo village, building and managing a tourist visitor centre at Ebonla. It is actively involved in marketing the products that have been developed using billboards, brochures, posters, postcards as well as promotional campaigns to attract more Ghanaians. It is guided by the 2009, Marketing Plan – Amansuri Community Tourism which was formulated in collaboration with SNV.

The Amanzuri project has generated a lot of income, which has supported conservation and sustained and improved the livelihood of local residents.

GWS is also working on the Mount Afadjato Forest Conservation Project and adopting the development of ecotourism in the area to support conservation efforts. This project has been less successful because of high maintenance costs and low numbers of visitors to the site. However, it is encouraging local communities in the area to conserve the forest and reducing the illegal cutting of logs.

2.11.5 The COAST ecotourism project: 'Integrated Tourism Destination Planning and Management, Ada Estuary'

Within the framework of the Coastal Tourism Programme (COAST), a programme managed by UNIDO and with UNWTO (see Section 2.10.3), the Ministry of Tourism has the responsibility for the implementation of the COAST ecotourism project, entitled 'Integrated Tourism Destination Planning and Management, Ada Estuary'.

Ada is located at the estuary of Volta River on the Golf of Guinea within an hour and a half's drive from the capital Accra. Tourism has been developing in the area, mainly as a weekend destination for residents of Accra (Ghanaians and expatriates) and several hotels and guesthouses have opened to cater for this market. The local community in Ada is keen to also benefit from tourism. Based on these conditions Ada was selected as the location for a UNWTO ST-EP (Sustainable Tourism – Eliminating Poverty).

The central objective of the ST-EP programme is to contribute to the MDG's of the United Nations, in particular through contributing to the elimination of poverty through sustainable tourism. UNWTO is collaborating with UNIDO on the Coastal Tourism Programme in Africa. UNIDO has signed a letter of Agreement with UNWTO to support a number of COAST ecotourism projects, based on the experiences gained in the ST-EP Initiative. The Project 'Integrated Tourism Destination Planning and Management, Ada Estuary' is one of the projects supported through this partnership, started in 2012.

The main objectives of the project are the promotion of a sustainable tourism destination and ecotourism activities, and create pro poor employment and income opportunities

The specific objectives of the project are to:

i. improve service delivery and environmental management of existing small hotels being managed by local entrepreneurs;
ii. develop and promote canoeing on the Volta river and creeks;
iii. develop turtle and bird guiding;
iv. develop and promote walking tours and guiding;
v. develop tourist routes and information promotional materials;
vi. improve linkages among suppliers of aquatic and land based resources and tourism establishments and tourists (ex: crabs, agricultural products);

vii. develop and promote tours to local gin production village;
viii. develop a market ('point of sale') to be managed by the community for visitor services and products.

To date the project has provided training for:

- 28 tour guides and developed training manuals; topics included the nature of tourism in Ada; conservation of environmental resources; practical walking and boat tour guiding
- 25 boat operators and provided training kits
- 50 hoteliers, food vendors and vegetable growers; topics included personal hygiene and hygiene in relation to food production and presentation to customers

Actions to build partnership with the private sector to enhance supply and value chains in Ada and its environs have started. The project invited a team from Kasapreko Distillery Company undertook a day-visit to Ada and islands to assess investment potential in gin production and sugar cane production as a way of increasing tourism benefits, promoting corporate social responsibility.

The project is in its early days but is starting to have an impact.

2.11.6 Other notable community participation initiatives in the tourism sector

This section describes only a few more examples of work carried out by NGOs with local communities as well as private sector initiatives. There are many more in Ghana.

i. The Volta Regional Office of the GTA in partnership with other stakeholders has recently launched the homestay concept as a product of a community-based tourism development project. A pilot program is being initiated in Amedzofe based on an adapted model of the Malaysian Home stay concept.

ii. In the Ashanti Region several community-based initiatives have been developed over the years:

    - US Peace corps volunteers assisted communities in product development and in seeking funding from multi-laterals for marketing (through brochures and signposting), particularly at the craft villages
    - Nature Conservation and Research Center (NCRC) - engaged with community based ecotourism development projects at Kubease and (previously also at Bonwire).
    - AROCHA focuses in providing craftmen and women assistance for crafts production.
    - WINROCK International a few years ago (1997-2002/3) supported artisans with training on marketing their produce, displaying at shops and provided insights about preferences in crafts for western tourists visiting Ashanti Region.
    - Friends of Rivers and Water bodies focuses on the protection, conservation and preservation of water features.

iii. In Ada-Foah, near Shai Hills and fairly close to Accra, local communities have been involved in habitat restoration, providing boat trips and wildlife watching. Ada-Foah has been designated as a wetlands reserve and Ramsar site of international importance because of the large number and range of migratory and resident birds and the breeding sites of marine turtles.

Private Sector Initiatives

iv. Easy Track Ghana is a community-based travel services business with a goal of helping the local community while providing tours to visitors to Ghana. It was set up by Ghanaian-US partnership in 2006 and its philosophy is to keep all earned revenue in Ghana, spreading it widely throughout the community. It offers tours and guiding services and arranges homestay with local families.

v. CBT Tourist Information – Benelux is a private initiative aimed at fighting poverty by attracting customers for community-based tourism projects. It started its activities with a pilot in Ghana. Its promotion work includes the publication of 'Experience Ghana' a colourful and high-end guide on Ghana; media exposure with articles in magazines and newspaper, features on e-zines and websites; and providing Ghana tourist information to the press, giving lectures at universities and supplying GTA and others Ghanaian organisations with local knowledge and local support activities, including feedback.

vi. Jolinaiko Eco Tours includes local communities in its programmes. Its guidelines are that local people should be enabled to generate income from tourism to alleviate their poverty level; income realised from tourism activities should be used to develop communities by providing basic facilities; preservation of natural resources and endangered animal species should be ensured or encouraged; and tourism activities should be organised with respect for indigenous cultures and traditions of the Ghanaian people.

vii. The US-based tour operator, Green Bug Adventures offers ecotours, surfing adventures and volunteering experiences.

2.11.7 The empowerment of women through tourism

Tourism provides women with more economic and social advancement opportunities than most other sectors. With its low barriers to entry with regards to employment, the variety and availability of jobs at all levels and the possibility of flexible working hours tourism offers good job prospects for women.

Little research has been carried out about the role of women in Ghana's tourism sector with the exception of a study published in 2010, describing the contribution of Ghanaian women to entrepreneurship in tourism[47]. It explains that women are motivated to set up tourism businesses because of:

- ***Personal factors:*** personal interest, personal satisfaction, the need for independence, the need to make money, and the opportunity to fulfil a need
- ***Strategic factors:*** the need to invest excess capital and the need to launch new ventures,
- ***Circumstantial factor:*** redundancy

[47] Elijah Mensah, Angela (2010) *Self-Employed Women in Ghana's Tourism Industry: Some Evidence of their Motivations and Challenges*, Journal of Business and Enterprise Development, Cape Coast, Ghana

Women tourism entrepreneurs in Ghana face the same obstacles as their male counterparts (i.e. difficulty in finding qualified staff, poor road network to attractions, lack of development and sanitation at tourist sites, high taxes, cumbersome visa regime and so on…). The lack of access to funds and the lack of support from government were especially highlighted in the study as major constraints impeding the development of their businesses, although it is not clear if women are particularly disadvantaged because of their gender.

A joint UNWTO/UN Women report *'Global Report on Women in Tourism 2010'*[48] explains that while:

> *'tourism can also help poor women break the poverty cycle through formal and informal employment, entrepreneurship, training, and community betterment, not all women are benefitting equally from tourism development. In some cases, lack of education and resources may prevent the poorest women from benefitting from tourism development. While in some regions tourism helps empower women, in other regions, tourism negatively affects the lives of women and perpetuates existing economic and gender inequalities'.*

Five goals to support women's empowerment and protect women's rights through better tourism work are identified in the report. These include:

- promoting equal opportunities for women working in tourism
- inspiring increased entrepreneurship for women in tourism
- advancing women through education and training
- encouraging women to lead in tourism
- protecting vulnerable women and those working in home-based tourism enterprises

The research examined the role of women in different regions of the world, established indicators to monitor the performance of tourism in empowering women and assessed the extent to which tourism is advancing the needs of women in the developing world. The analysis found that women in Africa are well represented in government with several female Ministers of Tourism around the continent but there is still a relatively low percentage of women in leadership positions in business, women graduates in services and women teaching in tertiary education.

The Global Report on Women in Tourism 2010 made a number of general and detailed recommendations to encourage the empowerment of women through tourism. The general recommendations of the study are presented in Section 5.10.6 to support the recommendations made in this Plan. The report concludes that tourism's capacity to empower women socially, politically, and economically is particularly relevant in developing regions where women may face the greatest hardships and inequalities. The sector challenges cultural stereotypes, provides women with a political and economic platform as their contributions and significance grow in the local economy, and provides income-generating opportunities. It does however point out, that women are not as well represented at the professional level as men, that they are still not being paid as much as men and they are not receiving the same level of education and training in services as men are.

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[48] UNWTO and UN Women (2011) *Global Report on Women in Tourism 2010*, UNWTO Publications, Madrid, Spain

2.12 SWOT analysis of the tourism sector in Ghana

Identifying the Strengths, Weaknesses, Opportunities and Threat (SWOT) of the tourism sector in Ghana presents a synopsis of the current situation of the sector and provides a basis for formulating strategies to capitalise on identified strengths, address weaknesses, focus on opportunities and avoid threats. The SWOT analysis presented in Table 28 is a summary of the more important points to highlight. An expanded and more detailed SWOT analysis is featured in Appendix 2.12.1.

Table 28: SWOT analysis of the tourism sector in Ghana

Strengths	Weaknesses
Statistics • Historic experience of stakeholder cooperation through an Inter-Ministerial Committee to develop the Tourism Satellite Account • Experienced senior officer based in the Ghana Statistics Service with good understanding of UNWTO requirements/methodologies for introducing the Tourism Satellite Account	**Statistics** • Inadequate and/or unreliable statistics for policy formulations and for policy-based research • Key data sets not collected • Inter-Ministerial and stakeholder cooperation and communication is weak • Capacity weaknesses at both national and regional levels in statistics collection and analysis
Tourism economy • Ghana is becoming more and more open to outsiders, businessmen and pleasure seekers. • Relatively strong and stable macro-economy within the ECOWAS sub-region • Growing middle-income earners • Expansion of the banking services and easy conversion of foreign currencies • Availability of policy framework that protects investment and makes it easy for repatriation of dividends on tourism investments by foreigners • Political Stability as an enabling environment for tourists and foreign investors	**Tourism economy** • Inadequate politico-economic will to prioritise tourism as having high potential for generating incomes and as a labour-absorbing (-intensive) activity that will reduce the level of unemployment • Lack of hard-core venture capitalists who can partner government to exploit opportunities in the sector for mutual benefits • Lack of recognition of the industry by financial market operators as an activity of high potential profitability and, therefore, deserving investible funds • Weak linkage of the sector to other sectors to maximize benefits to the economy through supply and value chains • Lack of financial incentives to the locals in participatory development to enhance and preserve the quality of destinations.
Tourism infrastructure and services • There are approximately 30 airlines that provide international flights to Ghana	**Tourism infrastructure and services** • Relatively high airport taxes resulting in high air fares • Congestion and poor roads inhibit convenient and rapid movement around the country and urban areas • Only 58% of the population have access to a safe water supply (2010 figures)
Tourism resources and assets • The overall diversity of tourism resources within Ghana • The genuine and general friendliness of Ghanaian people and, on the whole, their positive attitude to tourists • The accessibility for tourists of engaging with Ghana's people, traditions and culture	**Tourism resources and assets** • General standards of cleanliness and sanitation in public areas • Lack of enforcement of planning control and guidance leading to inappropriate development to the detriment of tourist resources

Marketing and branding • Growing middle and higher income domestic market segment • Steady increase in international arrivals • Ghana's unique variety of cultural and natural resources, its safe environment and inherent hospitality are foundations for a strong tourism brand • Brand Ghana and other overall image campaigns provide a basis for building a tourism brand	**Marketing and branding** • Market research limited • Ghana is not known as a tourist destination • Market structure dependent on business and volunteer tourists; real leisure tourism market limited • A weak tourism brand identity and fragmentation of tourism brand application among public and private sector partners • Lack of financial and human resources for managing and coordinating the tourism brand
Institutional framework • Organised sector with well-established public and private sector institutions • Willingness to work together in partnership if conditions are appropriate • Public Private Forum endorsed by law	**Institutional framework** • Instable leadership – high turnover of management at MOT and GTA • Weak implementation capacity of the public sector • Ineffective Public Private and Inter-Ministerial relationship
Policy and regulatory framework • Commitment of the government to formulating a Master Plan for tourism • A comprehensive policy has been drafted in conjunction with tourism stakeholders • The Tourism Act 817 has been passed and gives power and credibility to the tourism sector	**Policy and regulatory framework** • Weak capacity and lack of funding to implement the Master Plan • The Policy is has not been ratified by Parliament, is too long and complex and is not an official document for the sector to base itself on • There are ambiguities in the wording in the Act and in the description of the functions of the GTA
Human resource • Academically qualified and enthusiastic managerial and supervisory staff • Goodwill of government of develop tourism • Enthusiastic market for training	**Human resource** • Absence of Human Resource Development and Management policy framework both for the Public and Private sectors • Inadequate professional capacity and relevant experience in the Public sector in spite of the possession of minimum academic qualifications by incumbents • Lack of national standards for all levels of hospitality and tourism training
Environmental issues • Strong system of National Parks and well organised Wildlife Division protecting the parks • Strong presence of NGOs focusing on environmental conservation • The environment is a major tourism asset in Ghana	**Environmental issues** • Problems of pollution and sanitation at tourism sites • Sand winning is depleting beaches resulting in increased costal erosion which is affecting tourism • The capacity of the DAs to ensure compliance to sanitation and environmental health standards
Community involvement • Community-based tourism is well established in Ghana supported by NGOs • GREET provides a marketing service for community-owned ecotourism destinations • The community in Ghana is accessible to tourists because of the natural friendliness of Ghanaians and the safe environment • The volunteer sector is strong in Ghana and there are opportunities for community tourism initiatives	**Community involvement** • Over–reliance on NGOs – some initiatives disappear after NGO cease operations • Marketing remains a problem for local communities • Quality issues

Opportunities	Threats
Statistics • The establishment of a robust, accurate, reliable and comprehensive System of Tourism Statistics • The eventual introduction of the Tourism Satellite Account	**Statistics** • Increasing skepticism in relation to the official statistical performance indicators presented for the tourism sector • Development of a negative perception towards and a doubting of the performance credibility of the Ghana Tourism Authority and the Ministry of Tourism
Tourism economy • Both politicians and economic policy makers are gradually becoming aware of the need for diversification into alternative activities from oil and mining with long-term sustainability like the tourism development • The recently established GTA and the Development Fund should provide useful administrative and funding avenues for the development of the sector • With sustainable economic growth and development through democratic governance, and exchange rate stability, neighbours in the ECOWAS sub-region, especially Nigeria and Cote d'Ivoire, may become more interested in touring Ghana than previously. • Supply of accommodation facilities and a pool of tour operators are on the increase and can result in competitive pricing that will lower the cost of stay and travels within Ghana respectively.	**Tourism economy** • Recession in key generating countries could pose a threat to the growth of the industry. Similarly, financial crisis in those economies can impact negatively on tourism arrivals. • In terms of local tourism destinations, a civil strife that impacts on the local economy can negatively affect demand for the destination • Unhealthy competition among tour operators in order to maximise individual returns seems o undermine the collective growth of the industry • Threats to political cohesion can be translated into future economic instability and, as such, negatively impact on tourists.
Tourism infrastructure and services • New international airport services at Tamale will increase travel options • Volta Lake Transport Company proposals for improved infrastructure on Lake Volta offer a great opportunity for tourism development • New investment into highway improvements will increase accessibility for tourism	**Tourism infrastructure and services** • Infrastructure at Kotoka International Airport (KIA) may not keep up with demand, resulting in the loss of potential flights and tourist visits • Navigation difficulties on Lake Volta due to submerged trees and poor and inadequate navigation charts
Tourism resources and assets • Historic buildings and districts that remain, which could form the basis for tourism development, such as Elmina town	**Tourism resources and assets** • Tourism development initiatives being carried out by agencies such as the Wildlife Division and the Volta River Authority, without any linkages or liaison with the Ministry of Tourism • Weak and ineffective planning control by District Assemblies • Loss of historic buildings and heritage assets before restoration and/or conservation has taken place
Marketing and branding • The product diversification opportunities match the needs of diversified international markets and segments • Public-private sector partnership in marketing and promotion • A coordinated tourism branding initiative can raise Ghana's tourism image and performance immediately • Acceptance and application of the tourism brand by all tourism role-players will serve as an important vehicle for industry cohesion	**Marketing and branding** • Limited buy-in by key public and private sector stakeholders for a public-private marketing and branding partnership • High costs will outperform the attractiveness of Ghana as a leisure tourist destination and limit the market structure to business tourism • Lack of institutional capacity and funding for an effective tourism brand initiative

Institutional framework • GTA is a new institution with greater powers than GTB and a new working environment can be instilled • The new funding regime provides the GTA with the opportunity to effectively support the industry • Re-structuring at the MOT will improve its effectiveness and ability to implement the Master Plan	**Institutional framework** • The institutions cannot see the value of working together to implement the Master Plan • HOTCATT ceases to exist leaving tourism vocational training to private institutions that are not accredited • The next government does not see tourism as a sector worth supporting
Policy and regulatory framework • Opportunity to redraft the tourism policy for Ghana updating it to be presented to Parliament for ratification • The tourism development fund provides the sector with its own mechanism to generate funds required to achieve its role of developing the sector	**Policy and regulatory framework** • The system to collect the 1% levy needs to be properly organised and transparent or it will fail to provide the expected revenue • The policy document may be rejected by Parliament
Human resource • Retain and develop HOTCATT into a National Hospitality and Tourism Training School • Professional upscalling of capacities in the Public sector to match roles and best practices • Development and implementation of an effective tourism awareness campaign at various levels and sectors of the economy	**Human resource** • Inadequate budgetary allocations for capacity building in the Public sector • Weak and ineffective succession planning for the public sector • Uncoordinated training interventions in the public and private sector may be detrimental to the sector
Environmental issues • Enforcement of rules to ensure the environmental quality of tourism sites and of beaches • Opportunities to develop specialised tourism based on nature like animal viewing, bird watching, hiking and so on • Potential to obtain funds from oil and mining companies to protect the environment and to support tourism community tourism initiatives	**Environmental issues** • Oil and mining concerns are allowed to operate without checks and balances – corruption may be a problem • Illegal mining, cutting of mangroves, and depletion of forests are not controlled • Government does not provide appropriate waste management treatment plants for tourism enterprises to use • Poor sanitation and the possibility of outbreak of life-threatening and/or highly-expensive-to-cure diseases can create bad image for the sector.
Community involvement • The natural hospitality and friendliness of Ghanaian makes for an ideal country for visitors to integrate with local communities • The interest in tourism is increasing, including amongst local communities • Volunteer organisations are interested in developing tourism initiatives	**Community involvement** • Over-reliance on foreign NGOs result in projects failing • Established community-based businesses devastated from encroachment by big business • Rejection of tourism by traditional rulers

Chapter 3: Development Goals and Objectives, Strategy Rationale and Competitive Positioning

This chapter sets out the goals and objectives to be achieved over the next 15 years during Ghana's updated tourism development plan. It discusses the reasoning behind the choice of strategy that will be pursued and identifies Ghana's competitive position in the regional and global context.

3.1 Development goals and objectives

The development goals and objectives guiding the tourism development strategy expounded in this plan reflect the Government of Ghana's aspirations expressed in the Ghana Shared Growth and Development Agenda (GSGDA), the United Nations commitment to achieving the Millennium Development Goals (MDGs) and the principals set out in the New Partnership for Africa's Development (NEPAD) and the Revised Treaty of the Economic Community of West African States (ECOWAS). These are captured in the Ministry of Tourism's Vision and Mission.

Thus the **overarching goals** are: to contribute to the country's economic wealth, reduce poverty, conserve the environment, promote sustainable development and practice, foster national cohesion, and achieve greater GDP growth.

This will be achieved by:

- creating a conducive and favourable environment for sustainable growth and development that will ensure that the sector greatly contributes to GDP
- the effective and efficient use of appropriate policies
- developing corporate planning programmes and projects as well as public private partnership

These overarching goals are enhanced by the following specific goals and objectives:

Planning and development goal: to develop tourism in a planned and sustainable manner

This will be achieved by:

- formulating a phased spatial plan to guide the distribution and nature of tourism development
- proposing improvement and expansion of existing attractions and assets and developing new attractions
- exploiting the opportunity of planned infrastructure development and influencing development priorities
- encouraging sustainable and responsible development that protects the natural, cultural and historical resources of the country

Business development goal: to improve and expand commercial tourism facilities and services

This will be achieved by:

- supporting the development of SMEs
- promoting and supporting investment in tourism plant and products
- building the human and institutional capacities of the sector to provide high quality services

- maximising opportunities for local communities to participate in tourism through supply and value chain linkages
- promoting sustainable consumption of resources such as water and energy and encouraging appropriate disposal of solid and liquid waste as well as recycling
- ensuring the quality of services and products offered by the business community by providing guidelines on standards and through extension services, training and enforcement of regulations

Marketing goals: to diversify tourism source markets and market segments

This will be achieved by:

- developing a positive and sought-after tourism brand identity and improving Ghana's tourism image locally and abroad
- ensuring consistent application and promotion of a common brand identity by all public and private tourism stakeholders
- adopting a targeted marketing approach
- diversifying the product base to match the needs of the different markets and market segments (providing value for money)
- intensifying public-private partnership in marketing and promotion
- establishing a presence in key source markets
- developing promotional tools and materials as per the key markets and segments
- monitoring and evaluating the results of marketing activities by conducting market research at regular intervals

Human resources development goals: to improve the capacity, quality, quantity and performance of human resource of the tourism industry

This will be achieved by:

- consistently and diligently developing the capabilities of staff of MOT, GTA, GTDC and HOTCATT
- promoting public private sector partnerships to establish training institutions
- promoting uniform tourism and hospitality training standards
- encouraging the establishment of a national hospitality and tourism training school to set the benchmark for other hospitality and tourism training schools
- ensuring coordinated training and workshops for current public sector and industry personnel
- establishing a national hospitality and tourism accreditation body to accredit hospitality and tourism programmes
- Developing the academic and professional competencies of the private sector to deliver quality services

Institutional and management goals: to provide an effective institutional, regulatory and financial framework to support the development and growth of the sector

This will be achieved by:

- ensuring proper coordination between public and private sector tourism industry and related stakeholders
- clearly defining the roles and functions of tourism institutions
- promoting effective stakeholder partnerships (public-private, public-public, private-local community, etc.)
- providing reliable and credible data and information as a basis to inform

planning and investment choices and enable performance monitoring of marketing and product development initiatives to be undertaken
- developing a regulatory system that promoted sustainable development, conserves the resources and ensures the quality of the tourism experience
- reducing and eliminating obstacles that may be deterring investment in tourism or tourists from visiting the country
- providing a safe, secure and healthy environment for tourists as well as for the local population that interact with tourists
- prioritising actions that will help the local population derive benefits from tourism either directly by participating in the sector or indirectly by supplying the sector
- securing adequate levels of financing to implement the tourism strategy and plan

Goals to maximise the economic impact of tourism: to ensure maximisation of tourism contributions to the economic development of Ghana.

This will be achieved by:
- formulating policies and providing enabling environment that will maximise tourist arrivals
- ensuring the availability of tourism data and information to accurately identify and determine the extent of economic impact
- keeping a up-to-date statistical database which records documents and researched planning, development, product development, marketing and promotion issues
- finding ways to raise the value and supply chains to induce tourists' longer stay and higher expenditure
- ensuring an efficient and effective financial system in order to minimise exchange rate volatility
- promoting the use of local inputs and contents to minimise foreign exchange leakages
- upgrading skills of the industry's workforce in order to enhance their professionalism and earnings
- formulating optimal tax policies to ensure compliance from the industry's players
- providing appropriate tax incentives and/or subsidies to promote investment in the industry which will, in turn, raise tourism impact on the economy
- facilitating the investment environment
- incorporating a poverty-focus into tourism policy
- emphasising local people's priorities and circumstances in the planning of all tourism projects and programmes
- improving opportunities for the wider involvement of communities in the supply and value chains of tourism products and services
- increasing access to training and skills for women, the youth, the unemployed and the handicapped

3.2 Strategy rationale

Tourism in Ghana has progressed substantially since the 1996 master plan was formulated. At this stage of Ghana's tourism development it is important that the strategy that is adopted delivers the desired objectives in a realistic, achievable and logical manner and that the pace of development is appropriate. Therefore on the supply side an incremental growth approach is described in this strategy document consisting of three main stages:

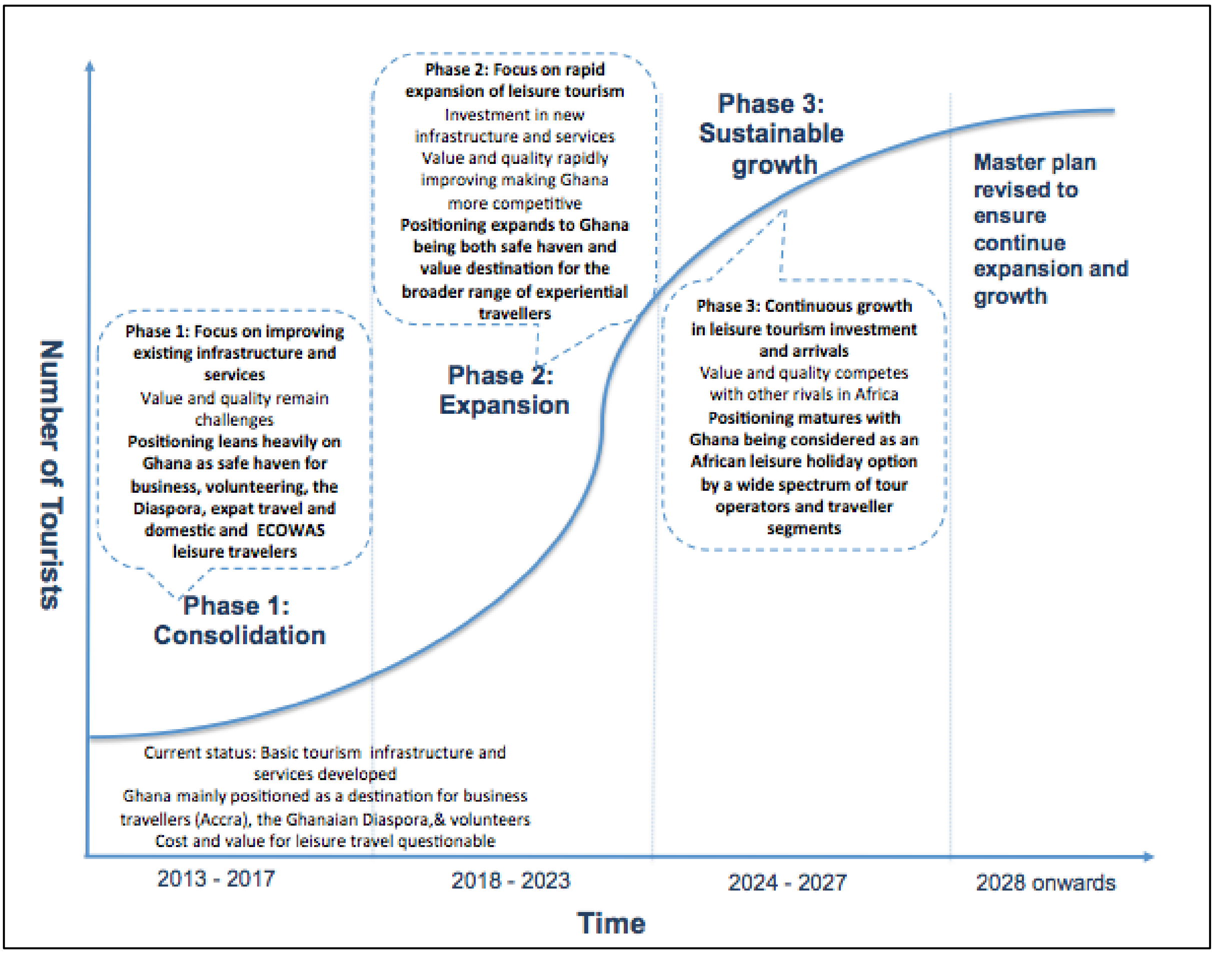
> ***Stage 1:*** consolidation of areas where tourism is well established and already attracting a regular flow of tourists by creating a framework that will allow tourism to continue growing, reducing barriers and building up the credibility of the sector
>
> ***Phase 2:*** expansion to open up underdeveloped tourism areas and resources
>
> ***Phase 3:*** sustainable and consistent growth

At the moment Ghana attracts a limited number of market segments. Therefore on the demand side the strategy will focus on expanding the portfolio of market segments during the life of the plan focusing in the first instance on developing the leisure market and the domestic market.

3.3 Competitive positioning

It is expected that Ghana's competitive positioning will evolve over the next 15 years as the above-mentioned phases unfold. Figure 15 below presents the expected positioning over the next 15-year life cycle curve:

Figure 15: Expected changes in competitive positioning 2013-2027



Source: Ministry of Tourism, UNDP, UNECA, UNWTO

- During Phase 1 (Consolidation) the destination will build on the achievements to date and will depend heavily on its position as a safe haven choice for travel segments with a low demand elasticity and who have limited choices due to business, heritage, travel distance, social requirements and other factors. These include business travellers; SAVE market (scientific, academic, volunteer, educational); visitors fro ECOWAS countries, expatriates living and working in Ghana and the Ghanaian domestic market.

- During Phase 2 (Expansion) will be a period of rapid market and product growth. Ghana will retain a strong position among established market segments and will increasingly be considered as a safe, high value destination for a broad range of experiential travellers. These expanding segments could include backpackers, the more mature, higher spending traveller in search of new culture and nature experiences, special interest niche markets, conferences and exhibitions, etc. Tour operators and tourism investors will expand the their Ghanaian portfolios rapidly during this phase.

- In Phase 3 (Sustainable Growth) the country will be firmly established as a popular leisure travel choice in Africa offering excellent value and being frequented by wide range of travel segments in search of the Ghanaian culture, lifestyle and variety of natural and heritage attractions. Tourism arrivals and product capacity will increase consistently and steadily during this phase.

It is expected that the Tourism Master Plan will require substantial revision following these three phases, to ensure continued and sustainable tourism expansion and growth.

Chapter 4: Structure Plan for Tourism

The structure plan is the physical expression of the tourism development strategy, which in this case is phased over the 15-years of the plan. This chapter describes the changes since 1996, the existing spatial tourism framework, and shows how it could evolve over time in 5-year increments if the strategy prescribed in this plan is followed.

4.1 Phased approach to developing the structure plan for tourism

The 1996-2010 Plan identified the principal tourism zones, together with tourism centres (primary sites) and tourism stopovers (secondary sites). Access to, and circulation within Ghana was shown by tourist gateways at the international airport and at key border crossings. These were linked with excursion routes, following the main road, transit corridors, as well as an excursion railways routes and a Volta Lake cruise route.

Phasing of the development was recommended to be carried out simultaneously in all zones, to allow the benefits of tourism to be geographically spread throughout the country as soon as possible. However, the need for a phasing of development within each zone was noted. The structure plan acknowledged the necessity to match the phasing with government plans for improving infrastructure, especially the road network, as these are crucial elements in tourism development.

Section 2.6 reviewed the tourism resources and assets within Ghana and assessed the degree to which recommendations within the 1996 plan had been followed and/or fulfilled. What is apparent from that review is that whilst significant progress and development has taken place since 1996, the scale and scope of tourist development has fallen significantly short of the proposals indicated in the plan. Given the state of tourism resources in 1996, and the comprehensive nature of the proposals made in the plan, this is not altogether surprising. Stronger political will and great development funding would have been needed to implement all the recommendations in the plan. Consequently, the approach to the structure plan for tourism for 2013–2027 is intended to focus development in specific targeted areas in a phased manner and to be clear about the recommended direction and form of a structured, sequence of tourism growth within the country in the form of a phased, spatial tourism framework.

4.4.1 Existing spatial tourism framework

In order to make recommendations for an appropriate phased, spatial tourism framework for Ghana, it is necessary to establish the nature and form of the situation at present, analysed and represented in a similar manner to the phased (five, ten and fifteen year) plans that follow. This is essential, to understand the tourism base that is being built on, and to allow a meaningful comparison between the existing and future situations.

The existing spatial tourism framework is shown diagrammatically in Figure 16.

Figure 16: The existing situation

Source: Ministry of Tourism, UNDP, UNECA, UNWTO

The triangle of Accra – Kumasi – Cape Coast forms the core of tourism development and activity within Ghana. This circuit, as well as the varied products and assets within it, forms the foundations of the tourism experience. It is also at the heart of the most densely populated areas of Ghana and therefore has a substantial catchment for domestic and expatriate tourism.

It includes the following components:

- Accra, as the capital and sole international airport in Ghana, is the main gateway for tourist arrivals and departures. Its importance as a gateway is unfortunately not matched by its attraction or significance as a tourism asset. As set out in section 2.6 above, the capital city is, potentially, a major component of any visit to a country but is currently a disappointing experience.
- The core triangle incorporates a range of tourism resources, in each of the categories outlined in section 2.6. Natural attractions include: Ghana's most visited national park at Kakum as well as excellent beaches along Ghana's south coast; some of the most important historical heritage sites including numerous forts and castles and traditional buildings which, are recognised as World Heritage Sites in the country - Cape Coast and Elmina Castle and Fort St. Jago are amongst the most significant structures in Ghana; the presentation of cultural heritage in Kumasi allows excellent access and exposure to Ashanti traditions and customs; and other attractions within this core area include museums - in Accra, Kumasi, Cape Coast and Elmina, cocoa farms, and botanical gardens.
- The urban areas in Ghana incorporate a wide range of further activities, events and resources including markets, sports, music, arts and festivals.
- Crucially, in both urban and rural areas there are the locations and opportunities to engage with and experience Ghana's people.

Beyond this core triangle there are important 'spurs', which form additional components of the tourism resource. These include:

- The coastal strip of the Western Region with beaches as the main focus but also natural attractions including the Nzulezu Stilt Settlement and Ankasa Resource Reserve.
- The Ramsar sites along the coast particularly to the east of Accra, including Keta and Songor where, at Adah, boat trips allow closer access to the natural environment and wildlife.
- Akosombo, where the dam itself is an attraction as well as recreational activities on the Volta Lake.
- Shia Hills Resource Reserve, currently the most accessible of the protected areas within Ghana.

There are many other tourism resources within Ghana, as described in section 2.6 above. However, the inconvenience and in some cases, unavailability of good access, results in limited opportunities for these sites to attract significant tourist visitors. The most notable exception to this rule is Mole National Park, which has poor access and only limited availability and choice of accommodation, but is regarded as one of the most significant and valuable tourism assets in the country. Visitor numbers are restricted by these constraints but it stand out as a site with unlocked potential and scope for future development and improvement.

4.4.2 Structure plan approach – a phased spatial plan

The **phased spatial plan** approach recommended here is similar to the 1996-2010 Plan in that it is intended, to spread sustainable benefits of tourism throughout the country as quickly as possible. However, it differs, in some respects, from the 1996-2010 Plan in that it proposes another way to achieve this wider benefit, in the medium to long term, by focusing the development initiative in areas where the maximum benefit and impact can be made in a cost effective and viable manner. Rather than spread development effort thinly over a wide area, with the potential for the dilution of impact and the lack of a collective and integrated product, it is proposed to focus development in a several key areas.

In section 3.1 the Planning and development goal to '*develop tourism in a planned and sustainable manner'* was to be achieved with the following objectives:

- formulating a **phased spatial plan** to guide the provision and nature of tourism development
- proposing improvement and **expansion of existing attractions** and assets and **developing new attractions**
- **exploiting** the opportunity of **planned infrastructure development** and influencing development priorities

The spatial framework to achieve these objectives is set out below.

4.4.3 Phase 1: 2013-2017 – consolidation approach

The approach adopted for Phase 1 is illustrated diagrammatically in Figure 17.

The **existing attractions and assets**, described in 4.4.2, which form the existing tourism spatial framework, will be **improved and expanded**. Access, infrastructure and services are already in place to support these assets but these also need to be strengthened and improved.

New attractions need to be **identified and developed**, and these should **exploit** the opportunities presented by **planned infrastructure development** over the 2013-2017 period.

Section 2.4 above set out current proposals for infrastructure improvements within Ghana.

- One of the most significant, in respect of potential tourism benefits, is the investment in transport and recreational facilities in and around Lake Volta, which offers a very cost-effective way to create a new attraction in itself, but also to extend and enhance the network of travel and access options throughout Ghana and to form a transit and recreational corridor from which additional new attractions can grow.

- This corridor will extend from the existing hub at Akosombo to Makango and Buipe, with overland linkages from there to Mole National Park, Tamale and the rest of the Northern, Upper East, and Upper North Region. This transit connection can be reinforced and augmented by the upgraded Eastern road corridor, currently under construction. When completed, this corridor will significantly reduce travel times and open up improved access to tourism resources that have previously been relatively inaccessible.

Figure 17: The first 5-year phase – 2013 to 2017

Source: Ministry of Tourism, UNDP, UNECA, UNWTO

The two axes of water and road transportation can work together to form an interconnected network of North-South movement along which a variety of new tourism resources can develop.

- Access to Tamale, Mole and the entire Northern Region, via an Eastern route, allows options for a circuit, with journeys in the opposite direction via Kintampo to Kumasi.

- Domestic flights from Tamale add to these travel choices. The future expansion of Tamale airport for international flights will strengthen its role for domestic services with the likelihood of increased services, more competition, and lower prices. International connections direct to tamale will also enhance choice and flexibility of travel options.

- Akosombo will be an important new hub for this Eastern/Lake Volta corridor as it is the most developed resource at the 'edge' of the existing spatial tourism framework and forms a platform from which new services and resources can grow.

Despite the planned road and transport improvements, travel is, and is likely to remain, relatively time consuming and sometimes uncomfortable. There is therefore considerable merit in developing the range of activities and tourist day trips that can be done from a single location – encouraging longer stays and promoting domestic tourism. This applies to each of the nodes in the structure plan: Accra; Kumasi; and Cape Coast/Elmina/Kakum. It should also be the goal at the newly developing node at Mole National Park and surrounding areas.

i. From Accra, there is the scope for day trips and local circuits at the following locations:

   - Ada Foah to see the estuary of the Volta and to visit islands;
   - Akosombo Dam to enjoy the Volta Lake environment;
   - Shai Hills to explore the most accessible protected area in Ghana; and
   - Koforidua to see the Boti Falls and Akaa Falls

ii. From Kumasi there is the scope for day trips and local circuits at the following locations:

   - A range of specialist craft villages, incorporating kente weaving, adinkra cloth, woodcarving and pottery;
   - The UNESCO World Heritage Sites of the Asante traditional buildings, including a Yaa Asantewaa trail;
   - The relaxing and scenic setting of Lake Bosumtwi, created by a meteor strike; and
   - Gold mine tours at Obuasi

iii. Within the Cape Coast/Elmina/Kakum area there is the scope for day trips and local circuits at the following locations:

   - Cape Coast itself, with the castle as the focal point together with the town as a whole;
   - Elmina town incorporating Elmina Castle, Fort St. Jago, as well as heritage buildings that make up the historic townscape; and
   - Kakum National Park, with the walkway augmented with a range of activities and accommodation types

iv. From Takoradi and Sekondi there is the scope for day trips and local circuits at the following locations:

- Takoradi/Sekondi for deep sea fishing as well as the heritage buildings and port
- The beaches of West Coast (Busua, Butre, Princess Town, Cape Three Points, Axim, Beyin)
- The lighthouse at Cape Three Points
- The Forts and Castles such as Fort Sekondi, Fort Sao Antonio at Axim, Fort Appolonia at Beyin, Fort Gross Friedrichsburg at Princess Town, Fort Metal Cross at Dixcove and Fort Batenstein at Butre
- President Nrkrumah's Birth Place and Mausoleum at Nkroful
- Amansuri Wetlands and the Nzulezu Stilt Village

v. At Mole, there is the scope for day trips and local circuits at the following locations:

- Within Mole park itself, the range of activities could be developed to include off road cycling, and cave exploration;
- Larabanga is home to the oldest surviving building in Ghana, the Larabanga Mosque, together with potential for community activities and engagement; and
- Mognori community already provides a range of tourism activities including canoeing, village tours, drumming and dancing performances, home stays, and craft demonstrations. The village has the potential, and desire, to encourage more tourist visits.

Specific projects and proposals for phase 1, including several of the locations outlined above, are described in section 5.3 below and set out in the 5-year action plan in Chapter 6.

4.4.4 Phase 2: 2018-2022

The approach adopted for Phase 2 is illustrated diagrammatically in Figure 18.

The extended spatial framework established in Phase 1 forms a platform for further consolidation and growth in Phase 2 and beyond.

- The reinforced transit corridors can be exploited to develop new attractions, with viability enhanced by the strengthening and expanding of the core tourism framework;
- New spurs can be established which connect to new and existing attractions;
- Further consolidation can take place in existing tourism areas;

4.4.5 Phase 3: 2023-2027

The approach adopted for Phase 3 is illustrated diagrammatically in Figure 19.

The spatial framework established in Phase 2, forms a platform for further consolidation and growth in Phase 3 and beyond.

- The spurs can link together to form additional circuits, opening up new tourism resources and allowing more flexibility and choice for itineraries, access and movement;

- There is the potential for new travel opportunities via restored and new rail services and increased domestic flight routes and services;
- The spatial tourism framework extends to every region and brings potential benefits to the whole of Ghana and its people.

4.4.6 The structure plan: 2023-2027

The proposed Structure Plan for Ghana 2013-2027 and the spatial framework required to achieve it is represented in Figure 19 and is the culmination of the three phase of physical development.

The phased approach to the physical development is synchronised with the proposed marketing strategy as well as with the human resources strategy to allow steady and strategically guided tourism development.

Figure 18: The second 5-year plan (2018 to 2022)

Source: Ministry of Tourism, UNDP, UNECA, UNWTO

Figure 19: The third 5-year plan (2023 to 2027) and the tourism structure plan

Source: Ministry of Tourism, UNDP, UNECA, UNWTO

Chapter 5: Tourism Development Strategy for Ghana

This chapter proposes a tourism development strategy that will achieve the development objectives presented in Chapter 3 and support the physical development strategy detailed in Chapter 4. It is informed by the Situation Analysis detailed in Chapter 2, which highlights several constraints and obstacles hampering the progress of the tourism sector in Ghana. Recommendations are made to address these constraints and obstacles.

5.1 Recommendations on the policy and regulatory framework

A well-drafted and universally accepted tourism policy is a fundamental tool to manage and develop the tourism sector in the country. Its purpose is to provide guidelines and directives to achieve objectives agreed by stakeholders for future tourism development and growth. Its framework is built on rules and regulations, which when properly enforced, should support the achievements of the policy objectives. The policy is anchored the tourism strategy through a series of planned actions, often set out is a tourism development master plan.

5.1.1 Recommendations on the National Tourism Policy

Section 2.8 explained that a comprehensive National Tourism Policy exists but it has not been ratified by Parliament and it is not used as the document that guides the development and management of the sector.

It is vitally important that a tourism policy is ratified by Parliament and is officially recognised. It would give much needed credibility to a sector, which is not well understood by key decision makers in government.

a. Revise the policy document and submit it to Parliament for approval

The policy document needs to be redrafted and updated in a more concise paper, which Parliamentarians would be more likely to absorb, accept and ratify. It is recognised that the original document was attempting to provide as much information on the structure, performance and economic value of the sector as possible to educate the reader who may not be familiar with tourism as an economic sector. This important information may be included in an addendum to the policy or in a separate document to provide background and information.

The policy section should be no more than 25 pages explaining the sector's stance on different aspects of tourism management and development and its response to specific situations. It should guide managerial decision making when these situations are encountered and should help achieve agreed objectives. Therefore it is important that the policy is formulated with the participation of tourism public and private sector stakeholders as well as concerned civil society. The thematic areas, goals, objectives and outputs should be consistent with the Master Plan and should be agreed in a workshop similar to the one that was organised to formulate the 2006 policy document. The resulting document should be widely distributed (in particular to the press) and available online for interested parties to download.

A good model is that of the Ministry of Trade's 'Ghana Trade Policy'. The document is 25 pages long (including cover page and the forward) and is structured in four main sections. It is concise and focuses on ten thematic areas, proposing projects and outputs that will be achieved by implementing the policy. It is also available online at the Ministry of Trade's website.

b. Initiate a PR campaign aimed at high-level government officials and people of influence in Ghana to explain the value of the tourism sector and organise an international conference to generate media exposure

Section 2.8 identified that there is poor understanding of the tourism sector by other government institutions in Ghana, which is affecting tourism's credibility as a productive sector generating income and jobs and benefiting other sectors of the economy. As a result, the Ministry has difficulty in making its case to obtain adequate funding from central Government, to secure incentives to encourage sector development and to receive assistance from other governmental institutions and donors.

The 'Retooling the Ministry report' recommended: 'a well focused educational campaign to explain the uniqueness, economic power and how Ghana can develop international competitiveness based on a visitor economy'[49]. It suggests focusing on the Presidency, the Cabinet, the Economic Advisory Council, the Budget Division of the Ministry of Finance and Economic Planning and the Parliamentary Committees on both Finance and Tourism. This recommendation is fully endorsed in this study and it should be backed up by an international conference on the impact of tourism on the economy of selected countries. This would cover several topics to highlight the value and the needs of the sector, such as:

- the importance of collecting accurate, comprehensive and frequent data
- the need to develop a Tourism Satellite Account which will show the true value of the tourism sector to the economy of Ghana
- the barriers that impede tourism development and deter tourists from visiting the country such as the strict visa regime and the high prices charged in the sector (flights and hotels)
- the tremendous poverty reduction potential and livelihood options presented by the tourism sector
- the importance of Public Private Partnerships in the development and management of tourism
- the supply and value chain linkages

It must be a high-level conference, involving international organisations such as UNECA, NEPAD, UNWTO, UNDP, UNCTAD, the EU, the Africa Union, amongst others and noted experts should be invited to make relevant presentations as well as showcasing research by Ghanaian experts and academics. Invitations to attend should be extended to all senior personnel at Ministries in Ghana (Chief Directors and above), important personalities and stakeholders in the country but also in the region, and to the Press Corp, both nationally and internationally to generate TV and newspaper coverage. An external professional PR firm will be recruited to develop a public relations campaign that will serve to ensure that the messages that come out of the conference are widely distributed and understood and to create a lasting legacy. The campaign will involve media exposure and strong online presence. Financing could come from donors and from the Tourism Development Fund.

[49] Plan Consult, Retooling and Modernising the Ministry of Tourism into an Effective and Proactive Policy, Instrument of State', Report for the Public Sector Reform Secretariat, June 2011

5.1.2 Recommendations on the regulatory framework

The Tourism Act 817, 2011 provides the sector with a framework to control and regulate the sector as well as empowering the administration with generating its own operational and investment funds, designating tourism sites in the country and formalising the Public Private Sector Forum.

The weaknesses that were identified in Section 2.8 include ambiguous wordings in the Act that could be misconstrued; heavy bias toward regulation and policing of the industry as the main function of the GTA; the difficulties and expense in collecting the 1% levy from all tourism enterprises; and the cumbersome and expensive visa regime.

The Act empowers the Minister to make regulations by legislative instrument and make amendments to the Act.

a. Clarify ambiguous wording in Act 817

It is recommended that the wording of the Act be clarified so that the meaning cannot be misinterpreted. The powers of the Minister in terms of designating and controlling tourism sites should be made clear and reviewed to reflect the recommendations such as revising the functions of GTA in Article 3 and clarifying ambiguities in Article 45.

By the same token, the wording about GTA's regulatory function should be toned down to emphasise quality assurance and helping the sector improve rather than focusing on compliance and sanctions.

b. Review the functions of the GTA described in Act 817 to reflect all its roles in equal measures

Ensure that important functions of GTA are listed as duties and responsibilities. These are:

i. Marketing and promotion of the sector
ii. Registration, licencing and compliance with regulations
iii. Administering the Tourism Development Fund
iv. Conducting research, collecting and disseminating statistics
v. Ensuring pro-poor, sustainable and responsible tourism
vi. Identifying and acquiring land for tourism development
vii. Facilitating the development of tourism facilities and products
viii. Developing standards and guidelines for design at tourism attractions and enterprises and codes of practice
ix. Working with appropriate agencies, ensuring good quality standard in service delivery and building the capacity of tourism human resource in the public and private sectors in Ghana
x. Collaborating with public, private and international agencies
xi. Advising the Minister on policy issues
xii. Implementing the Master Plan

c. Consider involving the private sector in quality assurance and monitoring the sector

Rather than focusing on policing the sector, the GTA should strive to work with the private sector to ensure that the quality of products and services offered by tourism operators conform to expectations. This would mitigate the perception that the GTA exists solely to police the sector and collect taxes.

South Africa's classification system is run by the private sector with support from the public sector and is considered one of the best systems in the world (see Box 2).

Box 1: Case Study: The Tourism Grading Council of South Africa

The Tourism Grading Council of South Africa

Prior to the year 2000, grading of accommodation in South Africa used to be compulsory. It was linked to a levy system and to licensing. Levies went to the organisation SATOUR which has since been replaced by SA Tourism. The grading system was fraught with issues. It was very prescriptive in the sense that all the conditions for passing the inspection were listed in detail and were very rigid i.e. precise size of rooms, furniture and so on… The system became corrupt and discredited in the eyes of industry. Powerful groups voiced disagreement and decided that they would not cooperate with the system anymore. This forced the Minister of Tourism to declare a moratorium on grading. However, industry still required a benchmark through a quality assurance system and the government gave it the responsibility to define its own needs and when agreement was reached the Ministry of Tourism would provide the mandate. In effect grading became a Public/Private sector partnership. This was passed into law in the Tourism Act of 2000.

The Tourism Grading Council of South Africa (TGCSA) is a body comprising 20 members representing the tourism sector in the country including large hotel groups, independent hotels, B&Bs, the airline industry, tour operators, travel agencies, the game lodges industry and so on… The grading system now in place is voluntary and adopts the user-pay principle. Tourism service providers pay to be graded but receive a number of marketing benefits which include:

- A listing in the Annual Accommodation Guide which SA Tourism distributes internationally;
- Links on the TGCSA website so that online bookings are possible;
- Marketing of the grading system to industry and communities but also to tourists during and after their trip to receive feedback, which helps the sector to improve.

All negative feedback is analysed and acted upon by TGCSA and training may be recommended through Tourism, Hospitality and Entertainment Training Authority (THETA) to address specific issues.
Assessors contracted by TGCSA are independent professionals trained by THETA. They in effect become the sales and marketing force for TGCSA by finding and encouraging enterprises to join the grading system and providing them with their annual assessments. The assessors receive 60% of the assessment fee with the remainder going to the TGCSA. The fee is based on the size of the business i.e. in the accommodation sector 1 to 3 rooms; 4 to 7 rooms; and so on and so forth…

About 60 to 70% of all tourism enterprises are graded in South Africa. To encourage enterprises to join the scheme, government has declared that government business will only be conducted with graded establishments. Government is the largest purchaser of accommodation and catering services in the country so joining the system is a major incentive to capture a share of this business.

Government provided three years of seed money to establish the council and the scheme. Now the TGCSA is entirely financed through the grading fees. South Africa has the advantage of a large tourism business base of around 130,000 enterprises.

Sources: Primary research by the consultant

d. Consider collecting the 1% levy from tourism enterprises that are above a certain size or a certain turnover

GTA estimates suggest that star-rated hotels will contribute 83 per cent of total levy revenue generated from room tariffs. Collecting the fee will have a cost and it would efficient to calculate at what level it becomes more expensive to collect the fee than the profit it brings. The 'Retooling the Ministry report' reveals that out of the USD 14 levy charged in the US, USD 4 is for administrative costs of the levy (nearly 30% of the total fee). Collecting fees from every spot and chop bar may not be worthwhile in the short to medium term.

e. Agree a formula for the application of the Tourism Development Fund to the relevant tourism activities

It is strongly recommended that the Board agrees a general formula for the disbursement of the Tourism Development Fund so that each activity receive sufficient funds. Without set guidelines the fund may be high jacked by members with strong personalities who can argue their need for funds better than the others.

f. Highlight the loss of revenue resulting from the strict and expensive visa regime and continue lobbying policy makers to review the system

While lobbying government to change the visa regime has been recommended in every tourism strategy that has been formulated in recent years it has never been successfully carried out. The fact remains that the visa regime is a factor that is deterring leisure tourists from choosing Ghana as a destination to visit. It would be appropriate to understand and analyse the economics of high visa charges and the imposition of such rigid and bureaucratic entry criteria. It is proposed that a study to analyse the impact of the visa regime on the number of international tourist arrivals is carried out:

- The Ministry of Tourism and GTA should engage an economist to conduct an economic impact study highlighting cost/benefits of the visa regime on the performance and development of the tourism sector
- The findings of the study should be presented at the conference described earlier in this section and a way forward proposed for implementation by the Government
- A media campaign should then be organised to publicise the results.

5.1.3 Summary of recommendations for improving the policy and regulatory framework

The recommendations made in this section should be carried out within the first two years of the National Tourism Plan. To improve the policy and regulatory framework the following activities are proposed:

- In consultation with tourism stakeholders update and adapt the current tourism policy so that a concise document can be present to Parliament for its ratification

- Initiate a PR campaign aimed at high-level government officials and people of influence in Ghana to explain the value of the tourism sector

- Engage a specialist PR firm to carry out the assignment which will include organising an international conference to generate media exposure; disseminate the messages of the conference; create an online presence and a lasting legacy

- Review the wording in the Tourism Act 817 to ensure that there are no ambiguities and to ensure that all the functions of the GTA are clearly spelt out

- Involve the private sector in regulating and monitoring the sector

- Rethink the levy collection so that its collection is cost effective and efficient

5.2 Recommendations on the institutional framework and the role of institutions in implementing the master plan

The Master Plan will be implemented through Ghana's tourism institutions. To ensure a successful outcome and steady development of the sector the institutional framework must be improved.

5.2.1 Recommendations on improving the Ministry

The 'Retooling the Ministry report' provides recommendations on improving the Ministry, most of which are endorsed in this document. It considers the problem of leadership instability; the organisational performance of the Ministry; the human resource capacity; funding; business culture; and the use of new technologies.

c. Address the problem of leadership instability

The 'Retooling the Ministry report' noted that the high turnover of Ministers, Deputy Ministers and Chief Directors undermines the Ministry fulfilling its mandate. Of course changes of Government often brings changes of political appointees. However, the problem is exacerbated when the leadership is changed during the Government's mandate in Ministerial reshuffles.

It recommends bringing the problem of leadership instability to the attention of the President, as it undermines the investors, and donors, confidence in the tourism sector to be addressed at the highest level.

d. Develop a demonstration tourism zone

The report recommends developing a tourism zone to demonstrate the economic feasibility and returns on investment that tourism can bring. This document proposes nine project profiles that should be implemented to develop tourism around the country. Phase two of this master plan formulation project is to formulate detailed plans for two or three priority areas; these will be selected from the nine project profiles. It is recommended that one of these priority areas is chosen as the demonstration project and that investment is sought to implement the detailed plans that will be formulated in Phase two.

e. Designate the Ministry as a 'Technical Ministry'

The 'Retooling the Ministry report' advocates recruiting professional technical staff to the Ministry with a broad range of competencies and expertise and designating it as a 'Technical Ministry'. It also states that the Directorates should be adequately staffed with support personnel. This recommendation is strongly endorsed in this document along with capacity building of staff currently working at the Ministry.

f. Improve the working environment of the Ministry

There are plans for a new Ministry building, which may be funded by Chinese development assistance. It is essential that the Ministry is endowed with proper functional layouts, design and equipment to establish a conducive working environment. This also refers to working in an efficient and effective manner, keeping unnecessary interruptions down to a minimum, working in a structured manner and keeping noise down to a reasonable level.

It is recommended that the HR Department at the Ministry provides guidelines on effective working practices to create a productive business or corporate culture at the Ministry and organises workshops to implement the guidelines.

g. Build the capacity of Ministry staff

This vital issue is treated at length in the 'Retooling the Ministry report' and a Human Resource strategy encompassing the public sector is detailed in Section 5.9.

h. Strengthen the use of Information Technology at the Ministry and at its implementing agencies

The 'Retooling the Ministry report' identified that the Ministry and its agencies do not make optimal use of Information Technology and that staff use computers mostly for word processing, some data processing and for surfing the Internet. Information management within and between the institutions is mostly manual and there are no shared management system applications or corporate email service. Staff rely on commercial email services such as Yahoo and Gmail. All the information on the institutional websites need updating and these do not serve as a conduit to market the organisations to policy-makers, private sector and investors.

The 'Retooling the Ministry report' recommends that the Ministry formulates a clear policy on ICT for the Tourism Sector.

A complete ITC management system should be set up at the Ministry and its implementing agencies to improve the efficiency of the staff, enable them to share information and work together on projects by developing Intranet and a corporate email system, and to revamp and update existing websites. It is recommended that a firm be appointed to set up the system and to train staff in using it. A feasibility study needs to be carried out and the development of the system properly costed.

5.2.2 Restructure Directorates at the Ministry and their functions

The 'Retooling the Ministry report' makes several recommendations on Directorates and their functions. It advocates terminating the Procurement Directorate and redeploying its Director to a more strategic role. It suggests also transforming the Projects Unit into a new Directorate to handle international, governmental and industry relations, creating linkages with other key Ministries, agencies and institutions, thus disengaging it from its implementation role. If this option is adopted, this Directorate should also be responsible for sourcing donor funding.

These recommendations are endorsed, however further restructuring is recommended including the creation of an inter-agency permanent task force to coordinate the implementation of the National Tourism Master Plan.

Create two new desks: as the MOT's Vision statement states its commitment to poverty reduction and environmental conservation, it is strongly recommended that two desks are created to deal with policy issues of tourism and the environment and with community participation in the tourism sector. These may be placed under an existing Directorate (i.e. PPME) or a new Directorate entitled Responsible and Community Tourism as indicated in the Ministry's vision statement may be created to address these very important areas. Environment and community participation desks should also be created at the GTA to implement the Ministry's policies.

Create desks and appoint officers in other organisations to handle tourism matters/issues: it is recommended that desk officers from the following agencies are appointed to set up tourism desks at their agencies: the Wildlife Division, Ghana Museums and Monuments Board and the National Commission on Culture. These officers will serve as liaison between the MOT and its implementing agencies with the respective external agencies to coordinate policies and activities as well as work with the proposed Master Plan Permanent Coordination Task Force (see below).

i. Strengthen the MOT's monitoring and evaluation function

The policy monitoring and evaluation unit at the Ministry is not effective and needs to be strengthened. It is recommended that a separate Monitoring and Evaluation unit is created to concentrate all its efforts on assessing whether policies and programmes of the Ministry and its agencies are achieving their objectives and recommending redress and amendments to the programmes when necessary. It could be a new directorate or could remain under the PPME Directorate but would be a separate team with the sole focus of Monitoring and Evaluation. This unit should be headed by a professional and experienced Director.

j. Strengthen the Ministry's communications and information technology functions

Communication and information dissemination is currently under the RSI Directorate. It is recommended that this section is given greater prominence to build the credibility of the MOT and its implementing agencies by keeping the public informed about developments in the sector and to announce achievements on a regular basis. This unit would formulate a communication and PR strategy to strengthen MOT's progressive image and inform and remind major stakeholders about the work that it and its implementing agencies are doing, highlighting the positive results that are being achieved and the value of tourism to the socio-economic fabric of the country.

It is recommended that the unit should also be responsible for managing the information technology system for the MOT and its implementing agencies as described above.

k. Create a permanent inter-agency task force to coordinate the implementation of the Master Plan

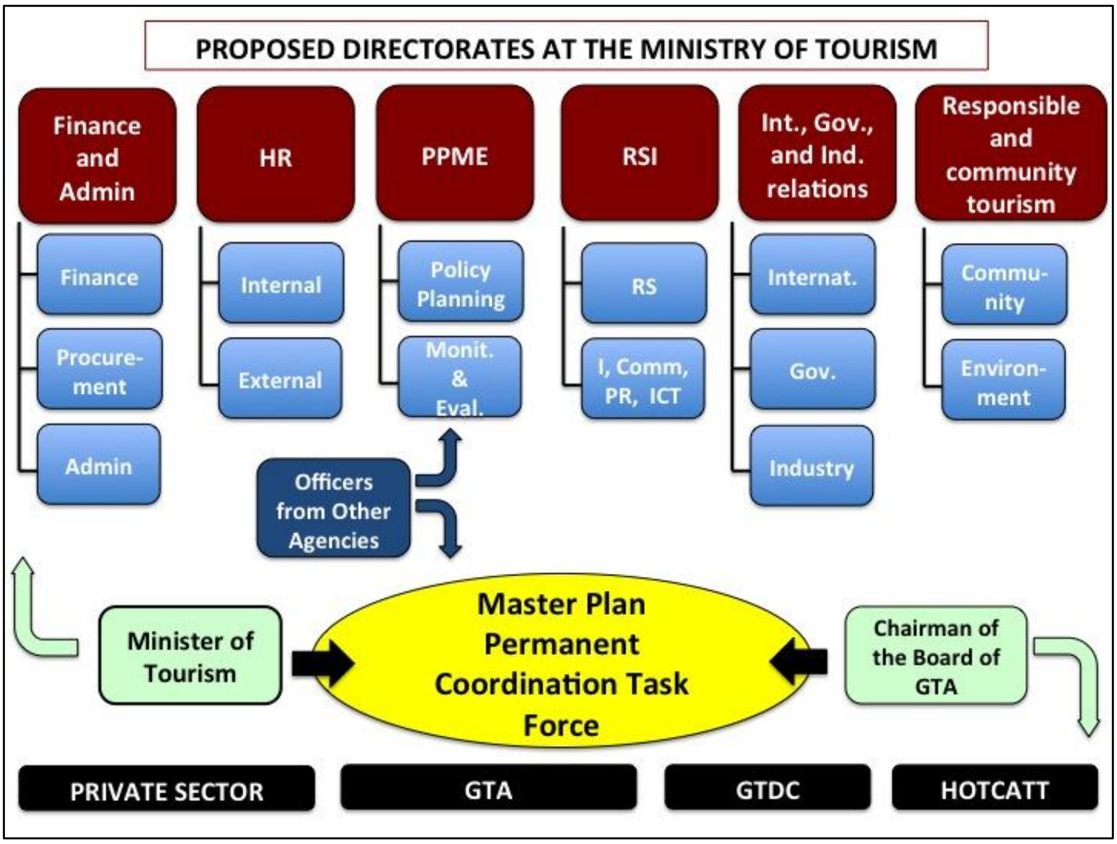
The 1996-2010 Master Plan recommended 'a Project Coordination Unit which will have the responsibility for coordinating implementation of the recommendations of the Integrated Tourism Development Programme including the National Tourism Development Plan'. It was to be placed under the Planning, Budgeting Coordination, Monitoring and Evaluation Directorate (the predecessor to today's PPME Directorate). Unfortunately this was not set up.

A similar recommendation is made here but in order to provide a more independent role, but at the same time encompassing the involvement of a wider range of stakeholders, the Unit should be a separate entity under the joint responsibility of the MOT, the implementing agencies and the private sector. This will ensure that the conflicts identified in the 'Retooling the Ministry Report' concerning encroachment in each others areas of responsibility is minimised.

Therefore it is proposed that a unit is formed comprising a small but highly professional and effective team reporting to the Minister and to the Chairman of the Board of GTA who will represent both the implementing agencies and the private sector. This unit will be responsible for monitoring that the recommendations of the Master Plan are implemented, that the activities detailed in the Action Plan are carried out within the time schedule indicated and for evaluating their results. Its role will be to work with the institutions and the agencies identified in the Action Plan, provide them with support, if possible assist in sourcing funding and reporting back on progress, on issues of concern and making recommendations on adjustments that need to be made.

The Task Force should be termed: the 'Master Plan Permanent Coordination Task Force' to indicate that it is not merely in place for a limited period but will continue to coordinate the actions of the Master Plan as it becomes updated and new 5-year Action Plans are formulated. The Task Force should also be mandated on approval of the Minister and the Head of the Board of the GTA to take over implementation of certain actions if the indicated bodies responsible are unable or unwilling to carry them out which would result in delaying the execution of the plan or impeding the strategic processes. The Minister can invoke Article 48 of Act 817, which stated that the Minister may on the recommendations of the Board by legislative instrument make Regulations - sub- section (b) – 'to design and manage tourism development and – sub-section (t) - 'for any matter to be prescribed under this Act'. The head of the Unit must be at the rank of Director.

Figure 20: Proposed restructuring of the Ministry's Directorates and introduction of the Master Plan Permanent Coordination Task Force



Source: MOT, UNDP, UNECA, UNWTO

l. Ensure that the Master Plan is legally adopted

The 1996-2010 Master Plan recommended the legal adoption of the Master Plan as the official guide for developing tourism. This would provide a legal basis for the implementation on the plans and programmes. It is therefore recommended that this Master Plan and the Tourism Policy are sent to Cabinet for approval and subsequent adoption by Parliament.

5.2.3 Recommendations on improving the other tourism institutions

The GTB has been replaced by the GTA; however, the new institution has retained the same staff and a similar overall structure. Therefore several of the observations made by the 'Retooling the Ministry Report' still apply.

a. Appoint professional staff at senior management level at the GTA and not political employees

It is important that the GTA is run as a professional technical organisation with permanent staff that can formulate and implement projects and programmes and provide technical extension services to the private sector. Staff should be able to see projects through without fear that they will be moved to another organisation. Political appointees rarely have the technical background to effectively manage the required technical aspects of the job and it often takes them a long while before they are able to focus their leadership of the organisation on achieving long-standing objectives. Projects started under one CEO may be abandoned when the new CEO comes into office and wants to stamp the authority of a new regime. This has major implications for the implementation of the Master Plan.

Therefore it is strongly recommended that a highly experienced professional be appointed to lead the GTA supported by a professional and experienced senior management team.

b. Establish an environment at GTA conducive to building a positive and productive working structure

The 'Retooling the Ministry Report' identified a lack of team spirit at GTB and key informants during this study reported that there was a need for a change of attitude. This is certainly linked to the lack of continuity in leadership and to the lack of clear direction as indicated above as well as to the low level of funding that the GTB has been receiving over the years. Also noted was that there were few meetings between head office and employees at regional offices and that no corporate plan exists for the GTB, just annual operational plans.

Studies have shown that worker negativity is due to several possible reasons:

- excessive workload;
- concerns about leadership effectiveness;
- anxiety about job and financial security;
- lack of challenging work, boredom, frustration; and
- insufficient recognition[50].

[50] Towers Perrin (2003) *Working Today: Understanding what Drives Employee Engagement* The 2003 Towers Perrin Talent Report, US

It is therefore vital that a positive attitude is instilled in the new organisation, the GTA, and this will require:

- strong and enthusiastic leadership,
- proper work plans to be formulated for each department and for each employee,
- priorities for teams to achieve
- regular meetings arranged between management and the rest of the workforce at headquarters but also at regional and in the future District levels.

Good work and positive achievements should be recognised and praised.

Team building is an important activity in any organisation and helps the team achieve its goals. Therefore goals must be clearly defined and barriers to achieving these goals identified and dealt with.

If deemed necessary employ the services of a corporate team building company: It is recommended that the corporate environment be monitored at GTA and if within the first year of the Master Plan there still seems to be a lack of team spirit and negativity amongst the employees that a corporate team building company should be commissioned to carry out an analysis and propose solutions to enable the workforce at GTA achieve the objective of the Tourism Act 817.

c. Keep the future structure of GTA to a manageable size

The concern expressed in section 2.7 is that with the addition of District Officers for all 170 Districts in Ghana and a team to collect the 1% levy from tourism businesses that GTA may grow to over 600 staff. The HR department must seriously consider how such a large workforce will be managed.

An analysis should be made of tourism development, current activities and potential in each District, the results of which should indicate areas where one GTA officer can handle several Districts at the same time. This would reduce the anticipated size of the workforce and make it more manageable, and effective and efficient use of limited resources.

d. Ensure that all stakeholders in the tourism sector embrace the recommendations of the Master Plan and are involved in its implementation

All stakeholders have a role to play in the implementation of the Master Plan, including the public sector, the private sector, the local communities, traditional chiefs and civil society. Therefore the vision for tourism, the phased strategy set out in the Master Plan and the recommendations it contains should be widely disseminated and a summarised version should be available to the public to download from the websites of all tourism institutions.

The proposed Master Plan Permanent Coordination Task Force would designate the bodies responsible for carrying out activities as indicated in the 5-year Action plan. GTDC for instance may be called upon to source land for tourism to build up land banks, HOTCATT may be asked to arrange a series of training workshops to build the capacity of employees of certain job functions, and the private sector may be required to contribute time, human resources and/or funds to joint activities such as organising fam trips with the GTA.

e. Strengthen Public Private Partnerships

Although there is regular interaction between the MOT, the GTA and the private sector it has been noted that not enough actions are taken jointly. The PPP Forum is not properly organised and should be held regularly as prescribed by Act 817, Article 42, which states that the Forum shall meet once a quarter. The Minister should use the Forum to interact with the private sector on matters concerning the tourism industry.

The developments recommended in this Master Plan will require the participation of all stakeholders and in particular, the public sector to provide the appropriate basis such as securing land, ensuring access etc. and the private sector to invest in tourism plant and products.

Organise regular investment fairs: It is recommended that at these quarterly meeting of the Forum (and as often as required) that a review of tourism development progress is made and opportunities for collaboration presented and discussed – in other words small quarterly investment fairs.

Invite private sector members from outside the sector: The Forum should not only be confined to tourism stakeholders but also open to all private sector members with an interest in how the sector is developing, especially the oil companies and the mining concerns that impact on the tourism sector. Their contribution to the discussions and to the decisions made, their commitments to the sector and to promoting value chain linkages and their financial support would be a great boost to the development of tourism in Ghana.

Encourage stakeholders from large tourism enterprises to participate in the Forum: Efforts should be made to bring on board stakeholders from the larger hotels and from the airlines to participate in the Forum and to actively support the development of tourism in Ghana. These often have the backing of parent companies and large holdings and can be an invaluable resource to stimulate development.

Agree a work plan and budget for joint activities: Joint activities such as organising events, organising fam trips and supporting local community activities should be planned in advance including setting up schedules and synchronising agendas, determining the levels of contributions of each partner and the resources that will be made available. For instance, the GTA should be able to call upon hoteliers and tour operators to contribute financially or in kind to the organisation of an agreed number of fam tours a year. The private sector should be able to approach the GTA to contribute to a community event that it is supporting or HOTCATT to provide training to local communities that they work with.

Section 5.5.5 recommended the establishment of a non-political public-private sector-working group to carry out joint marketing initiatives and creating partnerships between the private sector and the local community for mutual benefit to strengthen economic linkages in the supply chain and to enhance certain community industries such as the handicraft industry.

Strengthen private sector associations: Training in leadership and managerial skills, networking and lobbying should be organised. Linkages with other associations such as Ghana Association of Industries, Chamber of Commerce, Institute of Marketing, Institute of Bankers, Institute of Planners and other professional bodies should be encouraged.

f. Garner the support of Traditional Rulers for tourism development at the local level

It is crucial that that chiefs are well disposed towards tourism development in their areas and that they influence the support of their subjects. Therefore it is proposed that a workshop/event is organised annually at the House of Chiefs in Kumasi to present the benefits of developing tourism and to demonstrate how the chiefs can support this. Smaller workshops can be organised for chiefs ruling in the tourist areas across the country.

g. Strengthen the Inter-Ministerial Committee

As pointed out in Section 2.7, the Inter-Ministerial Committee has been rather ineffective because the level of participants has not been high enough. Therefore it is recommended that a new Inter-Ministerial Committee be formed with the same Ministries but chaired by the Vice-President who will also call the meetings. Attendance should be Directors and above. In addition, a senior official from the National Development Planning Commission should be invited to join the Committee to ensure that issue related to tourism are captured in the National Development Plans as well as in Regional and Local Plans.

Section 5.8.3 recommends the establishment of an Inter–Institutional Platform (IIP) as recommended by UNWTO to collaborate on the development and launching of the Tourism Satellite Accounts for Ghana.

5.3 Product improvement and development strategy

This Section deals with how to improve the existing products and develop new products. It presents an assessment of the tourism resources visited by the consulting team and product improvement and development profiles to be developed during the first phase of the 2013-2027 Plan.

It describes products that products that do not require physical development but should be developed in Ghana, advise a development and planning approach appropriate for the projects prescribed in the Master Plan and recommends creating land banks to encourage product development and investment

5.3.1 Project profiles

Field trips were made to some of the key sites and areas, which are considered important for phase one of the Structure Plan and for inclusion in the five-year Action Plan. A summary of findings from these field trips and site visits has been set out in the form of individual project profiles which are included, in full, in Appendix 5.3.1.

The project profiles include:

- A short background to the site;
- The key issues that collectively justify the need for action; and
- A schedule of the investments and actions required to overcome the issues identified.

Project profiles have been prepared for the following sites:

- Elmina and surrounds
- Kakum National Park
- Kumasi traditional buildings and Yaa Asantewaa story
- Kumasi craft villages
- Mole National Park and surrounds
- Volta Lake and surrounding attractions
- Shai Hills Resource Reserve
- Sekondi Urban Regeneration
- The Eastern Region Route

These profiles will need to be developed into detailed scoping projects. Stage two of these studies will develop two feasibility studies, which will provide a guide to developing the remaining projects.

Figure 21 situates the project profiles around the country.

Figure 21: Location of the projects profiled in the 2013-2027 Master Plan

Source: Government of Ghana, UNDP, UNECA, UNWTO

a. It is recommended that each project that has been described in the profiles be developed during the first 5-years of the Tourism Development Master Plan

The profiles constitute the foundation of the product development strategy. They mostly consolidate existing products by improving them and in some cases developing new products such as recommended in the Volta Lake profile.

b. Recruit consulting teams to carry out the scoping studies and formulate detailed integrated Master Plans for each area

Terms of reference should be drawn up to recruit appropriate experts to formulate detailed development plans including land use plans and concept plans for attractions

c. Identify funders and implement the plans

The studies will indicate the funders that should be approached for different components of the plan (government, donors and the private sector). Opportunities for private sector investment should be presented at investment fairs in Ghana and abroad by GTDC and Ghana Export Promotion Authority and during the PPP forum meetings to local investors. Once the funding has been secured, appropriate development, architectural, construction and specialist firms should be approached through a tendering process to implement the plans. The recommendations on development and planning described in Section 5.3.3 and in Appendix 5.3.2 provide guidelines that should be applied in the formulation and implementation of the plans.

This process should be managed and the work monitored by the Master Plan Coordination Task Force recommended in Section 5.2.

5.3.2 Product development

This section recommends the conception of products that do not require physical development but should be developed in Ghana. It summarises a set of guidelines for developing these products that are described in greater detail in Appendix 5.3.3.

Product development should:

- be based on the comparative advantages of Ghana's tourism resources;
- be environmentally, culturally, and economically sustainable;
- be market driven – match the demand of the markets;
- seek to create product and market diversity;
- contribute to efficiency in the utilisation of tourist facilities, services and infrastructure – balance seasonality; and
- maximise length of stay and expenditure in Ghana.

Ghana is blessed with intangible and tangible tourism resources as listed in the 1996-2010 Plan. These resources provide the base for developing products for sightseeing, city tourism, small group Free Independent Tourists (FIT) travel with a driver/guide, holiday and leisure tourism, outdoor activities, special interest tourism, festivals, sports tourism and MICE (meetings, incentives, conferences and exhibitions/events). The following provides basic guidelines for the development of these types of tourism products.

a. Improve sightseeing in Ghana

Packages offered by local and international tour operators highlight the following places/themes in their product portfolios (this list is not exhaustive):

- ***Places:*** Accra, Cape Coast, Kumasi, Akosombo, Ada, Tamale, Mole
- ***Themes:*** traditional circuit (history and culture), return on the roots, festivals, culinary tours, honeymoons, adventure (climbing, hiking), beach packages

Sightseeing tours currently offered by the local ground tour operators, cover both general as well as special interest tours. The following issues should be addressed in the sightseeing tours:

- ***Build awareness of sightseeing opportunities in key international markets:*** The travel trade in key international markets is not aware of the opportunities that Ghana offers for sightseeing whether general and special interest;
- ***Ensure attractions are 'elderly-friendly':*** Many sites visited during the tours have low preparedness to receive elderly travellers, e.g. along the slave route;
- ***Adapt tours to market changes:*** Low adaptability to the market changes (for example, the younger generation is more interested in active holidays and combined holidays; not necessarily pure sightseeing holidays in big groups).
- ***Develop package tours for domestic tourists:*** Packages for domestic tourists in the form of e.g. weekend breaks on the beach and in national parks (quality time with the family; spouse; friends).

With the above in mind, the following should be considered in order to improve the quality of the sightseeing products:

- ***Improve information dissemination***: tourist suppliers, such as hotels and other accommodation facilities, should be able to provide adequate information on sightseeing tours being offered in the regions. Tour operators in the key source markets should be made aware of the opportunities that Ghana offers.

- ***Improve interpretation:*** Interpretation plays a key role in sightseeing tours whether they are general or special interest sightseeing tours. The goal of interpretation is to change attitudes and behaviour, motivate and inspire, and make information meaningful and exciting.

When developing a plan for interpretation, needs for rest areas, shade, toilets and safety as well as interpretive requirements must be considered in addition to carrying capacity. Interpretation plan is thus also a tool for visitor flow management.

Interpretive centres can provide services to both local people and visitors. They can offer the content of the place (e.g. the chieftaincy area; oil fields; gold mines), the entertainment of a themed attraction and the services of a tourism information centre. Depending on resources, information centre should appreciate local designs.

An interpretative centre can tell the story of the area, illustrate a story that cannot be told in-depth on-site, bring artefacts and stories to a place where people are, display and protect valuable artefacts, allow visitors to discover the story at their own pace, encourage visitors to further explore the community, meet the information needs of tourists and serve as a home base for tourists.

- ***Improve and diversify theme-based tours:*** The travel trade should distinguish Group Inclusive Travel (GIT) and Special Interest Tourist (SIT) groups as their demands are different. Usually the tours should offer a variety of accommodation establishments from rustic type of accommodation (one or two nights) to four-star hotels, all included in one itinerary.

- ***Improve the quality of tourism facilities and services:*** as explained in the following section on city tourism.

- ***Train ground tour operators in international business practices***: Malpractices of local ground tour operators may result in a lack of trust by the international travel trade in services offered in Ghana.

- ***Arrange training for local tour operators:*** in market research, product development and marketing. Joint training could be organised for the tourism bureaux and tourism industry.

b. Develop city tourism in Ghana

By developing city tourism, Ghana should be able to target medium- to high-yield market segments both within Ghana and in the neighbouring countries, as well as increase the spending of e.g. MICE related tourists.

City tourism usually attracts segments:

i. who are interested in the city tourism resources such as cultural attractions, shopping, entertainment, dining,
ii. whose trip duration is shorter, between one and three days at one time,
iii. who combine beach or special interest holiday with couple of days' stay in a city and
iv. who attend conferences and events.

The attractiveness and competitiveness of city tourism lie in its Unique Selling Point (USP) and the quality of services and facilities.

So far, Ghana has not taken full advantage of city tourism. Efforts should be placed in Accra (most of international visitors arrive to the country through Accra; regional markets come to Accra for weekends to relax and shop) and Kumasi (already part of the golden triangle packages).

The following points should be improved or developed in regards to city tourism:

- ***Take tourism into consideration in town planning:*** Thus, coordination between the town planning and tourism development at city level should be improved.

- ***Improve the quality of tourism facilities and services:*** Currently the quality varies – e.g. in Accra a two-star rated hotel did not have hot water even though this is one of the prerequisites for two star hotels but a guesthouse in Kumasi was able to provide this. Tourists should be able to trust the star rating system and expect same level of quality at various star-rated hotels.

- ***Improve signage in the major cities:*** currently street names are not seen and signage to tourist sites is lacking.

- ***Improve shopping opportunities by providing information about shopping centres, boutiques and markets:*** Shopping is one of the major activities of regional international tourists while on holiday.

- ***Increase entertainment opportunities:*** It is a common fact that there is a lack of evening entertainment for tourists and visitors alike or information about evening entertainment – other than bars and discos – is not easily available. Consideration could be given to e.g. theatre plays, music, local football matches to be promoted to the tourists.

- ***Provide information about city tours in hotels:*** Tour operators offer packaged half-day and one-day city tours in Accra and Kumasi. However, there is no hop-on – hop-off type of tours that are common in most popular tourist cities.

- ***Consider attracting investor(s) to set up a boutique hotel chain in various cities and townships around Ghana***: Local and colonial style architecture and buildings e.g. in Accra, Elmina, Sekondi, Kumasi offer opportunities to set up boutique hotels (or chain) for both domestic and international high-end market segments.

- ***Review the Parador Hotel Concept in Spain and Pousadas in Portugal, which could be adapted to Ghana (e.g. boutique hotels):*** The Spanish Paradores are luxury hotels in castles, palaces, fortresses, convents, monasteries and other traditional buildings throughout the country (see Appendix 5.3.2 for additional information).

- ***Develop 'living museum' cities:*** Study the tourism development example of the historical town of Toledo in Spain to find out how the government is encouraging local residents to preserve the old architecture and maintain the attractiveness of the city as a tourist destination. Toledo is a 'living museum'. This could be the model for historic cities in Ghana, for instance Elmina.

- ***Improve information dissemination within the cities:*** This includes setting up information centres at the airport(s) and in the centre of the city to provide information on tourist attractions and activities; to distribute tourist maps and to take bookings on behalf of local tourism businesses.

c. Develop small FIT (Free Independent Travellers) group travel with a driver/guide

With the growth in the middle-income domestic market segment, car ownership in Ghana is increasing rapidly. It is said that the growth of a country's car ownership is proportional to the increase of its income – every percentage point increase in income results in a percentage point increase in car ownership.

Due to the limited infrastructure and in some instance poor quality, major roads between and within cities in Ghana are congested, which decreases the willingness of domestic and expatriate markets to undertake long circular road trips. The domestic market prefers to drive to one destination and stay there rather than drive around. Expatriates, who have cars, appear to behave in a similar pattern. They want to avoid traffic jams and the frustrations associated with long waiting times.

Therefore it is expected that self-driving holidays will not be in high demand until infrastructure improves. However, routes for small FIT group travel with a driver/guide are becoming more and more popular. Some of local tour operators already feature these types of tours in their portfolios.

Self-drive holiday packages for small FIT groups could be developed along various themes such as nature, beaches, culture, culinary tours, outdoors and activities.

In Ghana, small FIT group holidays with a driver could be developed

- around the great circular route including (Accra, Akosombo, Volta Lake, Tamale, Mole, Kumasi, Elimina, Cape Coast, Accra)
- around the beach destinations (West Coast)
- activities (e.g. golf, water sports, adventure)

In addition to standard itineraries, routes based on themes should be developed. The following provides some examples of possible themes:

- ***Share our heritage and traditions***: a route introducing local heritage and knowledge and connecting with local communities. Interpretation and facilitation is key. This could be of interest to both the domestic and international market. ***Domestic***: families; parents introducing the local traditions to their children ***International:*** culture is their main motivation and interest

- ***Challenge yourself in Ghana***: concentrating on various outdoor activities such as water sports, climbing, hiking

- ***Beach Drive:*** introducing the best beaches and holiday and leisure destinations in the coastal region

- ***Family Drive***: concentrating on attractions, activities and educational sites. Selection of the sites would depend on the age of the children in the families.

The routes should be named and packaged in order to help potential customers to recognise the product. For the long-term future, when infrastructure is more developed, self-drive holidays should be promoted. Development of self-drive holidays requires good cooperation between tourism suppliers (accommodation establishments; attractions) and governmental organisations (tourism administrations, cities, planning departments, transportation department). In other countries private associations called Automobile and Touring Club have been established for private motoring within the country. The association looks after the interests, services and hobbies of individual motorists.

d. Develop holiday and leisure resort tourism

Holiday resorts have been developed along the beaches and lakes in Ghana. In many of these resorts there is little differentiation to reflect the nature of local resources and the type of demand. Most of them aim at targeting Meetings, Incentive, Conferences and Events (MICE) tourists, the high-income domestic market segment, expatriates and international tourists. Many of the resorts outside of Accra appear dilapidated and do not match the needs of the markets that they target, which affects the perception of quality of the product offered.

Ghana aspires to develop leisure tourism, especially targeting the high-and medium-income domestic and neighbouring international markets and expatriates in Ghana as well as in neighbouring countries. For these markets, various types of resorts should be developed and existing ones improved. A typology for various types of resorts (urban, holiday, local and specialist resorts) is presented in Appendix 5.3.3.

Urban resorts located close to large centres and key arrival points have the potential of attracting a large number of visitors, both excursionists and overnight visitors. Holiday resorts will be more peripherally located and aimed at encouraging visitors to stay for several days by offering a range of resort-based activities and excursions. Local resorts will depend mainly on attracting excursionists/day visitors from the local area and will serve as a means to distribute visitors more evenly within the country and to balance seasonality (they will limit the need to travel to the major resort areas during the peak season). Specialist resorts have the benefit of being linked to an attraction, which determines the nature of the resort and can potentially attract a specific market segment, which may be excursionists or overnight visitors, or both.

Activities to be developed to increase the spend and length of stay at the resorts include:

- water sports activities
- packages to visit natural and scenic attractions as well as cultural attractions
- hiking and nature walking
- wildlife viewing
- community-based tourism – interactions with the local communities
- cooking lessons (preparation of local dishes including trips to the markets)
- evening entertainment (e.g. shows/theatre plays, dinner cruises, festivals, drumming and dancing, storytelling around bonfire)

e. Develop tourism based on outdoor activities

The younger to middle-aged domestic population with higher income levels is increasing. Wealth, hedonism and the desire to live for today drive the domestic and international market to enjoy leisure, adventure activities and alternative sports.

This trend, along with the expansion of the middle classes, stress at work, and the pressure of urban living, fuels a growing demand for outdoor activities away from the city hustle. The following leisure trends have been noted in Ghana:

- motorised boating (for example in Ada)
- mountain biking (trips/tours are organised by Accra expats and by the local community in Cape Three Points in Western Region)
- rock climbing (practiced in Shai hills)
- hiking and camping (already activities in the national parks)
- an annual paragliding festival

Based on the above and the marketing objective to diversify the Ghana’s tourism product portfolio, tourism products based on outdoor activities should be developed for both the domestic and international market segments.

Destinations (and sites) developing outdoor activities should ensure that:

- safety standards of the sports/adventure/activity pursued by tourists are of the highest order through the establishment of operator codes of practice;
- practitioners/guides are qualified and certified; and
- specifications for equipment used for outdoor activities are regularly inspected

Local authorities should provide certain basic infrastructure and facilities such as signposting of trails to facilitate outdoor activities, particularly those that have no direct commercial application but which generate economic benefit for the area[51].

f. Develop special interest tourism

Special interest travel is driven by destination, activity, and/or special subject. A common feature is that travellers will require knowledgeable guides and high quality facilities to conduct their chosen activity. Special interest products have not yet been fully developed in Ghana. The extent of natural resources in Ghana supports the development of nature-based tours.

Appendix 5.3.3 presents the different types of special interest tourist with particular focus on nature-based tourists and bird watchers.

g. Focus on events and festivals[52]

As stated in the UNWTO handbook on product development, the organisation of events and festivals meet several tourism objectives. They:

- offset seasonal imbalances by holding events in the shoulder and off seasons;
- improve international perception and image of the country;
- attract visitor segments to whom the destination's other attractions do not appeal.

Events/festivals also:

- connect landscape to lifestyle
- attract media; media coverage generated by events helps destinations build confidence and a positive image
- bring the communities together; festivals are attractive to communities looking to address issues of civic design, local pride and identity, heritage, conservation, urban renewal, employment generation, investment and economic development
- act as catalyst to stimulate infrastructure and business and to support other attractions
- encourage first and repeat visits at facilities, resorts, attractions

[51] UNWTO (2011) *Handbook on Tourism Product Development;* Madrid

[52] Event tourism applies to all types of events: cultural celebrations, political and state events, arts and entertainment, business and trade events, educational and scientific events; sport competitions; recreational events; business (fairs, exhibitions, shows, meetings, conventions) corporate (sales, marketing, branding) and private events (party, celebration, reunion)

Ghana has many festivals all around the country. Appendix 5.3.4 lists and describes major festivals and indicates their potential to attract both domestic and international markets.

In packaging the events and festivals, the following basic topics should be taken into consideration (detailed guidelines for each topic are provided in Appendix 5.3.3):

- event and festival planning and management
- design principles
- scale
- focus
- timing
- environmental and socio-cultural carrying capacity limits
- destinations and festivals and events need to be differentiated from each other
- vision
- effective organisation
- media management
- targeted market segments
- balanced portfolio of events[53]
- leverage actions (to increase length of stay, develop partnerships with operators, combine with other event, and so on)
- event quality

h. Focus on MICE tourism

Business conferences can be subdivided into director conferences, sales conferences, administration conferences, and training programmes. These conferences choose their location between holiday resorts, downtown hotels, suburban hotels, airport hotels, and conference centres. Generally speaking, holiday resorts are preferred conference destinations.

The Accra International Conference Centre, under the Ministry of Foreign Affairs, can accommodate around 1,600 people in the main auditorium and offers two committee halls with the capacity of 200 people each; three meeting rooms with the capacity of 54 people in two and 34 people in the other. The conference centre was established 20 years ago and has not undergone any major refurbishments since then. Presently it not run in a very proactive way.

Conference travel is a highly specialised business. It requires a systematic approach from the bidding stage to the organisation of the conference. Conferences are usually run by professionals such as meeting planners, professional conference organisers and destination management companies.

Therefore if Ghana wants to develop its conference tourism sector a professional conference organising firm needs to start operation. Its activities would include:

- undertaking market research on future meetings and conferences
- keeping in constant contact with the companies based in Ghana and in other parts of West Africa
- answering tenders, preparing bids and lobbying for major conferences on

[53] Hallmark event – a recurring event possessing such significance, in terms of tradition, attractiveness, image, or publicity that it provide the host venue, community or destination with a competitive advantage

The conference centre(s) should be able to provide state-of-the art high-tech facilities including large screen displays, PowerPoint projection, simultaneous interpretation facilities, and remote videoconferencing facilities. Conference hotels of various star-levels should be connected to the conference and meeting facilities and have appropriate facilities for business people including broadband Internet in the rooms.

The strategy should be to integrate conference facilities and services with the leisure and sightseeing products offered in the country – package one or two day conferences with one day sightseeing or leisure tourism products in order to multiply the conference and exhibition site profits by nine times (expenditure on accommodation, catering, communication, tourism, shopping etc.).

Incentive travel is a special market segment in MICE. Events and tours are organised by corporations to reward excellent performance of their employees, agents, and to enhance relations with their customers. Usually incentive travel is organised in groups. Typically incentive travellers spend more money on activities, retail, and nightlife since the company pays their accommodation, and stay longer at the destination. Companies organising incentive travel usually belong to high-profit industries – automobile industry, finance and banking, insurance, medicine, electrical, cosmetics etc.

Incentive travel organisers request VIP treatment for their guests as well as creative themes based on participatory activities. 'Unforgettable experiences' have to be created and organised for these groups – e.g. mountain bicycle race; boating race; special dinner cruises on the lake, deep sea fishing etc.

Incentive travel is increasingly combined with training seminars and conferences. Thus this market segment would use conference facilities and participate in leisure activities.

However, the product is quite mature, as organisers do not take chances with 'untested' products.

5.3.3 Product improvement: development and planning approach

There is a very broad range of tourism products within Ghana, each of which has its own specific context, requirements, constraints, opportunities and detailed issues. Rather than give a prescriptive list of standards and detailed guidelines in this document, it is more appropriate to help understand the key issues and design criteria that need to be taken into account when developing concepts, ideas, plans and proposals for tourist sites within Ghana.

Whilst conventional design standards are most commonly applied to new development, it is also very important that existing tourist products are regularly monitored and evaluated to ensure that they are fit for purpose and are adapting to any changes in the development context and to appraise their relative success.

a. It is recommended that all development recommended in this Master Plan follow the guidelines that are described in Appendix 5.3.2.

These guidelines cover the following important aspects:

i. Establishing a brief
ii. Site selection
iii. Economic and market issues
iv. Delivery and management issues
v. Planning and design issues
vi. Site context and character
vii. Movement and circulation
viii. Facilities and elements within the site
ix. Adaptability / future flexibility

5.3.4 Create land banks to encourage product development and investment

The 1996-2010 Plan called for the creation of land banks to create an enabling environment for public and private sector investments in tourism. This recommendation was implemented by the then Ministry of Tourism and Diasporan Relations between 2000 and 2006 with the creation of 13 sites along the coastline, production of aerial photographs, production cadastral plans and profiles. This activity was undertaken in collaboration with traditional authorities, landowners and District Assemblies. The challenge was that the Ministry did not have financial resources to pay compensation to the landowners or enter into Public Private sector Partnership arrangement to protect the lands. Consequently, the chiefs and landowners sold the land to private developers thereby defeating the objective of establishing the land banks.

a. Revise this strategy as emphasised in the Tourism Act 817

Article 3 of the Tourism Act 817 prescribes the GTA to establish land banks to accelerate product development, improve tourism sites and promote private sector investment with the objective of reducing litigation associated with land acquisition in Ghana. The Tourism Fund could provide the financial resources for GTA to pay compensation to landowner and/or develop schemes that will allow them to enter into a PPP arrangement with private landowners and developers.

5.4 Recommendations on tourism branding

5.4.1 Why a tourism brand?

The brand communicates and embodies a promise about the nature, essence and inherent rational and emotional rewards of the tourism experience. This promise is at the core of a Ghana's appeal to millions of potential travellers looking for new experiences and destinations. On the other hand poor marketing and communication of the brand promise and failure to deliver the facilities and services promised by the brand will no doubt negatively affect the reputation and attractiveness of the destination.

Section 2.5.4 indicates that Ghana lacks a creative, inspirational and commonly used tourism brand identity. The following major challenges and opportunities stem from the situation analysis and will be addressed in the tourism brand strategy attached as Appendix 5.4.1 and the recommendations contained below

- Ghana does not have a clear and implementable tourism brand identity and guardianship

- The lack of clear tourism brand identity and guardianship has created a confused image among prospective customers. Thus there is a danger that Ghana is dropped from the prospective customers' shopping list.

- Brand communication is currently fragmented

- The meagre marketing budget of the Ghana Tourism Authority does not allow for effective brand communication and

- There is no clear "brand custodian" in tourism that has the mandate of taking care of brand management and communication

It should be made clear that the objective of the Tourism Master Plan brand exercise is focused on stimulating travel demand and unlocking the benefits associated with tourism growth rather than providing an all-encompassing national brand identity. Such nation branding is the domain of the Brand Ghana office. The brand identity proposed here is specific to tourism and thus contains specific wordings and visual designs that are aimed at stimulating tourism demand in the international and international markets.

A detailed tourism brand strategy is attached as Appendix 5.4.1 and based on this strategy a detailed, colourful Brand Guide was developed and submitted to the Ministry.

5.4.2 Brand image and competition

The proposals contained here are based on a five-step brand development model as described in Appendix 5.4.1 including image assessment among international tour operators, scrutiny of competitor tourism brands and using the "brand pyramid" to develop the tourism brand identity.

The competitor and tour operator image assessments revealed the following:

- It is clear that Ghana is a largely unknown tourism destination among the international travel trade to Africa and by implication among travellers interested in visiting Africa

- Based on feedback from key tour operators Ghana's tourism value proposition is that of a safe and easily accessible destination where visitors can have an authentic African experience by exploring Ghana's unique cultural and natural heritage

- Improved brand attractiveness will depend on the country's ability to develop its natural and cultural attractions, improve tourism service levels and most importantly, improve services that affect visitor movement and access such as health and hygiene standards, public transport and immigration and visa processes

- Ghana urgently needs an extensive promotion campaign to promote and establish its brand image. The opportunity cost associated with a lack of tourism marketing is large and Ghana's competitors are cashing in on hard currency and job creation that could no doubt accrue to the country. Without improving Ghana's brand equity and elevating the country's tourism image internationally and domestically, the country's tourism potential will not be realised and developmental efforts will suffer due to market ignorance.

5.4.3 Key elements of the tourism brand identity

i. Brand attributes and benefits

The combination of a large variety of culture, nature and beach experiences, the openness and hospitality of the people and the ease and safety of experiencing the entire Ghanaian package makes for a powerful selling proposition.

The benefits of this experience are many, i.e. experiencing a unique African culture, natural environment and lifestyle, relaxing and enjoying the music, food and socialising on offer, discovering unique cultural and natural phenomena, etc.; all in a safe and stable environment.

The emotional rewards offered to travellers visiting Ghana add a powerful dimension to the brand. Travellers wanting to escape the tensions, security concerns, economic pressures, rushed pace and concrete jungles of most regional and overseas source markets can come to Ghana to experience unique and authentic culture and nature, discover and enjoy a different and inspirational rhythm and lifestyle; achieve their dream of experiencing unique African traditions and nature; all in a safe and stable environment. This could bring an immediate and even lasting positive change to people's attitudes and outlook.

ii. Brand personality characteristics

The following three destination characteristics (with their various descriptors) are key to the Ghana brand identity:

Energetic: Colourful, Vibrant, Multi-faceted, Optimistic, Jovial, Sport-loving

Open: Safe & Secure, Reliable, Humanitarian, Generous, Free, Easy to explore

Authentic: Cultural, Preserving, Traditional, Responsible, Indigenous, Sustainable

These personality characteristics provide the Ghana tourism brand with a positive and inviting personality that should be reflected in brand design and communications. When communicating the brand care should be taken to use visual images, sounds and tone of voice that reflect and project the brand personality traits

iii. Core brand values and selling proposition

The brand attributes, rational and emotional benefits and brand personality traits culminate in three core brand values or brand pillars. These are:

- ***Participation***: Ghana's inherent hospitality makes it a participative destination that allows travellers the opportunity of engaging with the local culture and partaking in a range of activities

- ***Exploration***: Given the open and safe environment in Ghana experiential travellers are afforded excellent opportunities of exploring the many facets of Ghana's rich cultural heritage, variety of nature reserves and attractions and varying landscapes and water bodies

- ***Enjoyment***: Ghana's vibrant and colourful character allows many opportunities for relaxation and enjoyment, including participation and spectatorship in sport events, music festivals and performances, nightlife, beach relaxation, socialising are local bars and eateries, etc.

Based on these brand values Ghana's selling proposition could be summarised as follows:

"For experiential travellers in search of an interactive and authentic African experience Ghana, with its energetic, safe and authentic character provides ample opportunity for participating in local lifestyle, exploring the natural and cultural heritage and enjoying the vibrant and colourful sounds and sights, thus sharing in the unique Ghanaian energy and way of life"

iv. Brand essence and expression

The brand essence can be summarised as follows:

"Freedom to share in the unique Ghanaian way"

Various slogans were considered for creatively expressing the brand essence. Following consultation with the brand workgroup the following slogan was adopted:

Ghana: Sharing Our Rhythm

v. Brand visual design and messages

The brand visuals and tone of voice for communicating the brand identity are described and presented in the brand strategy (Appendix 5.4.1) and the Brand Guide.

5.4.4 Recommendations for implementing the brand

As has been indicated the current tourism branding situation is characterised by various challenges including the lack of an acceptable and inspirational brand identity, fragmentation brand communication, limited financial and human resources for managing and communicating the brand, etc.

Successfully addressing these challenges and opportunities will require much more than a strategy on paper. While the brand framework and brand manual presented in this document provide a solid basis for expanding Ghana's tourism brand image effective tourism branding will require a dedicated and well-resourced process of instilling a common brand identity and ethos in the tourism industry.

The following are major recommendations for establishing an attractive and widely recognised tourism brand identity.

a. Apply the key brand elements consistently across all media and stakeholder channels

It will be very important for the logo and brand design application to be approved and evaluated at a single brand management point (preferably with GTA) to ensure consistency with the prescriptions of the Brand Guide (see "managing and monitoring brand application" below).

Co-branding, i.e. applying the tourism marketing logo in combination with the logos of private companies and other public authorities should be allowed and encouraged under clear approval procedures and conditions referring to the credibility and affiliation of users, styling and layout guidelines and other technical specifications

The tourism logo and brand design are designed to compliment the design "feel" of the Brand Ghana logo. As it will be used for tourism promotion specifically it is not foreseen that the tourism brand and the Brand Ghana nation-branding designs and logo will be used simultaneously when tourism is being promoted.

The words used to communicate the brand in audio or written copy should reflect the brand pillars and energy of brand Ghana. A consistent font style should be used for introducing text copy on all marketing materials. The appropriate font specification is contained in the brand guide.

Photographic images used with the brand identity should reflect the brand pillars, i.e. should show some form of interaction and participation by travellers, should project the main opportunities for exploration, i.e. discovering interesting natural and cultural phenomena and should display enjoyment, vitality and fun. Images should be taken with angles and lighting that reflect the concept of rhythm or movement through a show of hands, body movements and body language or gestures.

b. Intensify brand promotion

A staged brand promotion program should be initiated to promote the tourism brand identity to tourism audiences in Ghana, the region and in key overseas markets. The following stages are recommended:

- Stage 1 (6 months – 1 year): brand consolidation and endorsement
    - establishing the branding workgroup
    - applying the brand on existing tourism initiatives and materials
    - communicating the brand in web and social media marketing
    - applying the brand to the corporate imagery of the Ministry, GTA and other organizations (offices, stationary, vehicles, etc.)
    - securing endorsements and commitment from all stakeholders to use the brand
    - establishing brand monitoring indicators and measurement methodologies
    - formulating a brand promotion plan
    - securing funding for special brand promotion initiatives.

- Stage 2: (Year 2): Brand expansion. Applying all of the above as well as:
    - A major domestic tourism promotion drive to infuse the brand values and a leisure travel culture among Ghanaians, including radio and print advertising, a travel program on local television, a PR drive, social media communications, etc. Such campaign should ideally be based on special price offers for Ghanaian families and expat residents, especially over weekends
    - Regional promotion of leisure travel packages working with travel agents in Nigeria and other neighbouring countries and backing it with a media hosting program for regional travel journalist
    - Expansion of the Stage 1 program to brand the major tourism sites and attractions
    - Expansion of social media brand communications drive
    - Agreements with key international tour operators to apply and promote the brand through special Ghana offers, in co-branding, etc.

- Stage 3: (Years 3-5): Brand growth. All of the above as well as:
    - Taking the tourism brand international through a concerted external communication campaign including:
    - International television advertising
    - A major program for hosting international travel media and journalists and educating them on the brand characteristics
    - A major travel trade partnership program including joint marketing agreements and travel trade familiarisation visits

Since there is a large degree of brand fragmentation in tourism an internal communications drive should be launched to secure the understanding, participation and enthusiasm of all relevant Ghanaian stakeholders in applying and promoting the tourism brand identity. This should include tourism brand endorsement and commitment by major opinion leaders in tourism and related sectors, including Brand Ghana, to accept, promote and apply the brand. The brand will only work if it is communicated and promoted by all relevant parties.

To give effect to the brand all key official and non-official tourism ‘touch points’ should be properly branded. These include welcoming signage at the various airports and other entry points, brand and interpretive signage at key tourism sites, all marketing materials (such as maps, brochures, posters, postcards, official tourism websites and social media channels, etc.) and corporate identities of the GTA, Ministry and affiliated partners including offices, corporate stationary, corporate clothing, official vehicles, etc.

All promotional components of the marketing strategy proposed in the Master Plan should include and communicate the brand identity. This includes print, audio and television advertising, web and social media marketing, the words and "tone of voice" used in PR and communication releases, production of marketing materials, stand designs for international and local exhibitions, special promotional materials used in Joint Marketing Agreements (JMA) with foreign tour operators, etc.

In addition to including the brand in external marketing actions the following initiatives are recommended:

- Having and annual "Tourism Ghana" industry conference where all tourism stakeholders will be updated on progress with tourism and the various initiatives undertaken to promote the brand
- Launching an annual "Ghana Tourism Awards" for recognising individuals and organizations that have played an exceptional role in promoting the brand
- Promoting the brand in all tourism and related events
- Communicating the brand to schools, especially where tourism and/or hospitality are taught

c. Manage and monitor collective brand application

Given the multiple stakeholders involved in promoting the tourism brand adequate brand management and monitoring will be critically important for ensuring the sustainability of the tourism brand.

Appropriate institutional capacity should be provided for managing the brand. The following institutional measures should be pursued:

- The Ghana Tourism Authority should be the custodian of the tourism brand on behalf of public and private sectors and should be adequately capacitated to fulfil this mandate. Adequate financial and human capacity (e.g. appointment of a strategic brand manager and having a dedicated brand management budget line) should be provided in GTA. The brand manager should work closely with all divisions of the GTA, the Ministry and private institutions to ensure a holistic brand roll out

- A dedicated brand management office and capacity should be established with a clear mandate and capacity to manage brand implementation, including setting of guidelines and standards for applying the brand, continuous communication regarding monitoring brand usage and other tasks. The key tasks will be to:

    - initiate and coordinate brand promotion initiatives e.g. branding and rebranding of marketing materials, corporate image branding, media communications regarding branding
    - initiate and coordinate tactical tourism branding actions when opportunities arise e.g. significant positive events like sport victories
    - advise on branding or promotion initiatives and designs

- commission and conduct surveys and market research to track and monitor Ghana's tourism brand image
- ensure that all relevant stakeholders buy in and use the brand
- approve applications by external stakeholders to use the brand
- monitor brand usage standards and technical application of the logo
- coordinate effective brand messaging

The brand strategy should be agreed among public and private stakeholders and all tourism stakeholders (institutions, companies and individuals) should actively communicate and display a common brand identity and imagery, either as their main marketing brand or as complimentary to their brands. Tourism stakeholders (both public and private sector institutions and businesses) have indicated their willingness and keen interest in embracing and applying a common brand identity and messaging. Mobilizing the major tourism operators and institutions could set in motion an expanding brand communication momentum. Key brand adopters should include:

- Primary brand partners i.e. partners that should be actively encouraged to promote the tourism brand consistently and continuously include:

    - Ghana Ministry of Tourism
    - Ghana Tourism Authority (GTA) and their regional offices
    - Industry bodies and their members including Ghana Tourism Federation (GHATOF) and its affiliates namely Ghana Association of Travel and Tour Agents (GATTA), Tour Operators Union of Ghana (TOUGHA), Ghana Hotels Association (GHA), Ghana Restaurants and Nightclubs Association, Ghana Traditional Caterers Association (GTCA), Car Rentals Association of Ghana (CRAG), Tour Guides Association of Ghana (TORGAG), Ghana Forex Bureau Association (GARFORB), Indigenous Traditional Caterers Association, National Drinking Bars Operators Association (NADBOA), Ghana Bar Operators Association (GHABOA), Institute of Hospitality formally (HCIMA) and Ghana Traditional Caterers Association.
    - Individual branded hotel chains like Mövenpic, Holiday Inn, Novotel and others.
    - Destination Management Organizations (DMOs) in regions like Savannaland and West Coast.
    - Ghana Airports Company for branding at airport entry points.
    - Brand Ghana

- Secondary brand partners, i.e. partners that should be encouraged to promote the tourism brand at suitable and appropriate occasions and locations, include:

    - Ministry of Foreign Affairs and its international offices
    - Other economic Ministries and agencies that from time to time deal with tourism related
    - Major corporations, especially those with strong and visible consumer brands associated with communication, socialization and transport, e.g. mobile phone companies, beer companies, petroleum companies, soft drink companies, etc.
    - Foreign airlines
    - Retail companies (clothing, electronics, etc.) aiming to attract tourist clients

  - Non-Government Organisations (NGOs) involved in promoting and developing Ghana's economy

A public-private marketing forum should be established consisting of relevant, senior representatives of the key brand partners. This group should act as an oversight body for tourism brand promotion and monitoring and will play a key role in facilitating joint decision making, agreement of joint marketing programs and ensuring that public and private tourism stakeholders promote a common brand identity and messages

A crisis communication team should be established to attend to the tourism image effects of events that may be detrimental to or contrary to the brand image and values

Adequate finances should be allocated for rolling out the brand identity visually, online and through other communication media. Promoting a common tourism brand identity will require substantial funding. The collection of a 1 per cent tourism levy should assist in alleviating current funding shortages for marketing; provided that an adequate proportion of such funds are applied for brand communication and promotion

5.5 Marketing strategy

According to GTA, the arrival volumes have increased steadily and doubled from 428,533 in 2005 to 1,080,220 in 2011. Business travellers account for the lion's share (40%) followed by overseas Ghanaians (25%) and leisure tourists (19%). The business traveller segment comprises high-value travellers who are not very price-sensitive and prefer to travel and stay in comfort. They generally stay for short periods and stick to the urban business hubs. At the other end of the value spectrum, substantial numbers of students and volunteers visit the country. This segment travels to and stays in less-developed rural areas of the country. They are highly price-sensitive and most facilities and services catering from them are at the budget travel level, run by local business people and communities. Overseas Ghanaians returning to visit their friends and relatives comprise a third major segment of visitors to Ghana at present. However, they prefer to stay either in their own houses or with friends and relatives and thus their tourism spend is limited.

International tourism is also quite concentrated in a few key source markets. The top eight foreign source markets comprised 60 per cent of all foreign arrivals in 2011 (Ghana immigration, 2012) – Nigeria (19%), the USA (13%), UK (9%), Cote D'Ivoire (5%), India (3%), Germany (3%), South Africa (3%), and the Netherlands (3%). Therefore Ghana's international tourism is vulnerable to economic and market conditions in these few source markets.

However, at the same time domestic tourism is increasing in line with the overall economic growth in the country. The number of Ghanaians and residents visiting major sites rose 5.3 per cent in 2011, generating 763,461 visits and USD 987,000 in entrance fees (Ghana Tourism Overview 2012).

Conservative figures for revenues and expenditure based on an analysis of several data sources by the economic consultant on the team have been used in the projection in Section 5.7. They show that revenue from tourism totalled USD 1.55 billion in 2011 and average expenditure per visitor increased to USD 1,410 in 2011.

This shows that Ghana has not captured its potential yet as it could market itself as:

- an extended city/holiday destination for the residents and expatriates in neighbouring countries and for domestic markets
- a cultural destination for the US, European and domestic markets
- a soft adventure destination for both international and domestic markets
- a special interest destination, for example, for bird watching

The following product-market match identifies the product-market fit in more detail. Two points have been allocated to products that are of particular interest to a specific market; one point to products that the market is somewhat interested in; and zero point if the market has no interest in the product. The scores across the markets for each product are totalled (column on the right of the matrix). The scoring is based on discussions during the focus group meeting organised at the workshop on 3rd of October 2012[54].

[54] The market-product match, however, should be verified by market research. Only limited market research was conducted among domestic and international tourists during the study and no up-to-date information about research results from previous studies with proper sample sizes was available.

Table 29: Priority target markets for tourism products offered and yet-to-be developed in Ghana

	Domestic						International												Total
	Business people	Families	School groups	Church groups	DINKS: double income no kids	Youth	Business and MICE	Expats living and working in Ghana	Volunteers/ interns	FITs	Special interest: bird watchers	Special interest: Researchers	Special interest: culture	Soft adventure	Hard adventure	Group tours: general interest	Neighbouring countries	Other: pls specify Education	
City breaks	1	2	2	1	2	2	0	0	1	1	1	1	1	1	0	2	2	1	**21**
Beaches	1	2	2	2	2	2	1	2	2	2	0	0	1	1	1	1	1	1	**24**
Luxury resorts	1	1	0	0	1	0	1	2	1	1	0	0	0	0	0	1	1	0	**10**
Mid-range resorts	2	2	0	1	1	0	2	1	0	1	0	1	0	0	0	1	1	0	**13**
Budget resorts	1	1	0	1	1	0	1	1	1	1	0	0	1	0	0	1	1	1	**12**
Eco resorts	1	1	0	0	1	0	2	2	1	1	1	1	1	1	1	1	1	1	**17**
Swimming and sunbathing	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	**19**
Jet skiing	1	1	1	0	1	1	1	2	1	1	1	0	0	1	0	1	1	1	**15**
Surfing	0	1	0	0	1	0	1	1	1	1	1	1	1	1	1	1	1	1	**14**
Canoeing	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	**11**
Boat tours (Lake Volta)	2	2	1	1	2	1	1	2	2	2	1	1	1	2	2	1	1	1	**26**
Sea cruises	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	**1**
Deep sea fishing	0	1	0	0	1	0	1	1	0	0	0	0	0	1	0	1	1	0	**7**
Fresh water fishing	0	0	0	0	1	0	0	1	1	1	0	0	0	1	0	1	1	0	**7**
Turtle watching	0	0	0	0	0	0	1	1	1	1	0	1	0	0	0	1	1	1	**8**

National parks	1	2	2	2	1	2	1	2	2	2	2	1	0	1	1	2	1	1	**26**
Hiking/walking	1	1	1	1	1	1	1	1	2	1	0	0	0	1	1	0	1	1	**15**
Biking/mountain biking	0	0	1	0	1	1	1	1	2	1	0	0	0	1	0	1	1	1	**12**
Castles and forts	1	1	1	1	1	1	1	1	1	1	0	1	1	1	0	1	1	2	**17**
Community based tourism	1	1	2	2	1	2	1	2	2	2	1	1	1	1	1	1	0	2	**24**
Local food and cuisine	1	2	2	2	2	2	1	0	1	1	1	1	1	1	1	1	1	2	**23**
Festivals/events	1	1	1	1	1	1	1	1	2	1	1	1	2	1	1	1	0	2	**20**
Handicrafts	1	1	1	1	1	1	2	2	2	1	2	2	2	2	2	2	2	2	**29**
Total	**18**	**24**	**18**	**17**	**24**	**18**	**22**	**29**	**28**	**25**	**14**	**15**	**15**	**20**	**14**	**24**	**22**	**24**	

Source: Focus group discussion on 3.10.2012

Based on the overall development goals and the product-market fit, a phased marketing strategy approach is recommended.

The next sections recommends markets to be targeted in the short-, medium- and long-term based on how tourism in Ghana will develop over the years, general world tourism trends and the expected funds available and the cost of marketing. However, all opportunities to market Ghana should be taken when they arise. For instance many countries are targeting markets like Brazil, India, Russia and China (the BRIC countries), possibilities to present what Ghana has to offer to these new markets should not be ignored if a cost effective opportunity presents itself like a subsidised trade fair or a road show in conjunction with a sales mission. Special interest tourism such as bird watching should be developed from the short-term onwards, but it will take a while to train sufficient numbers of specialist guides to cater for these markets, therefore the strong marketing effort will be made in the medium term.

5.5.1 Short-term (2013-2017): Consolidation of current markets while attracting some special interest market segments

During the first five-year period, the current markets should be consolidated and some special interest market segments targeted. This is the best option to improve and diversify the product for the anticipated expansion of leisure and holiday tourism during the mid-term phase.

Based on the consolidation approach, the following markets and market segments should be targeted during 2013-2017:

a. Domestic

The domestic market provides a healthy base for tourism activities around the country. With income levels increasing, this market is becoming more and more attractive to tourism. During the first five-year period, the **Greater Accra Region, Ashanti and Central region should be targeted** in the marketing activities as residents in these regions have the highest per capita expenditure in the country.

Specific segments to be targeted are:

i. Corporate/business segment

- It includes companies and businesses who organise meetings and workshops
- It should be targeted for team-building and incentive tours – product differentiation for the same market segment
- It can be reached through direct sales and therefore the responsibility lies with the private sector. Sales to companies can be carried out by inviting local business associations to resorts for parties and conferences to raise awareness of the resorts and their facilities as well as to establish and strengthen the image. Cooperation should be established with the Foreign Direct Investment Promotion Boards, which organise regular meetings for general managers of foreign funded companies in the above-mentioned markets. Similar cooperation efforts should be targeted at the Chambers of Commerce and offices of Commercial Counsellors of countries represented in Ghana.

ii. Couples with no kids segment:

- This segment includes DINKs (Double Income No Kids) - couples who are both already at work and have no children; they are considered to have more disposable income but are struggling for enough free time.
- It also includes ‘empty nesters’ - couples whose children have already left the parents; these couples are healthy and wealthy; they are considered to have more disposable income and they have time to travel.
- They are motivated by rest and relaxation; spending quality time with their spouses and/or friends; they attend weddings and funerals.
- Domestic tourism destinations compete with international tourism destinations for this market segment, especially for longer holiday
- They can be reached by advertising in national and local newspapers, on radio and on TV; through the Internet and social media; by word-of-mouth and Internet forums and blogs. The GTA should take on the role reaching these markets through advertising e.g. weekend travel supplements to major local newspapers read by the middle and high-income domestic segments and collaborate with the radio and TV stations to present travel documentaries about Ghana.

iii. Families/small groups of friends segment:

- Based on the observations during the field trips, a lot of Ghanaians travel with their families and/or with friends.
- Family travel is motivated by rest and relaxation – quality time with the family; education; joint activities.
- Small groups of friends also look for excitement and shared experience.
- The GTA should reach this segment through advertising in national and local newspapers, radio and TV; through the internet and social media; by word-of-mouth and Internet forums and blogs.

iv. School groups/church groups segment:

- Based on the observations during the field trips and the discussions with the stakeholders, school groups and church groups take a lot of excursions and overnight trips; Easter period seems to be favoured for overnight trips, especially for the church group segment.
- They are motivated by education (history, culture, nature, traditions) and serene environments.
- They can be reached through direct sales, advertising in national and local newspapers, radio and TV; through the internet and social media; by word-of-mouth and Internet forums and blogs. Direct sales are the responsibility of the private sector. The GTA should support the direct sales effort with press and media campaigns.

b. Semi-international markets

Semi-international markets live in Ghana but are foreign passport holders working and living in the country. These segments can be described as follows:

i. Expatriates:

- It includes international people living and working in Ghana with resident/work permit.

- It includes people with various professional backgrounds – entrepreneurs who have established their businesses in Ghana; well paid people at management level; miners and oil field personnel.
- It includes singles, DINKS (double income, no kids), and families.
- Expatriates are motivated by rest and relaxation; exploring and getting to know the country.
- After the so called 'honeymoon' period in the culture shock curve is over, they may be reluctant to drive around the country due to the traffic jams – therefore it is important to highlight the safe and secure domestic flight connections like Accra-Takoradi and the easiness in travel (resort picks up the customers from Takoradi airport).
- They should be used as ambassadors for Ghana; they need to be provided updated information about new tourism developments; experiences etc. on a regular basis.
- They can be reached through expatriate clubs in Ghana; the Internet and social media; guidebooks; word-of-mouth and Internet forums and blogs; advertising in national and local media.
- It is recommended that this market segment be targeted jointly by the GTA and the private sector. Promotional events can be organised in Accra together with hotels, resorts, domestic airlines, and travel agencies to present new developments and holiday experiences in Ghana for expatriates working in Ghana.
- The GTA should provide up-to-date information to expatriate clubs and associations so that they will be able to include the information in their web sites.

ii. Volunteers:

- These includes international students who do their practical training with NGOs based in Ghana and travel around the country during weekends and public holidays or extend their stay after their internship is over.
- Budget travellers who spend locally (eat, drink, shop, sleep).
- They are motivated by exploring and getting to know the country; interacting with the local people, learning their traditions and cultures; and by rest and relaxation.
- They may invite their parents and friends to visit them while they are still in Ghana.
- They travel with guidebooks, ipads and computers, and therefore accurate information about destinations and sites should be readily available.
- They are users of social media – positive and/or negative.
- They can be reached through advertising in local and national newspapers, radio and TV, the Internet and social media, word-of-mouth and Internet forums and blogs.
- The GTA needs to work with the press and media; be active in the social media; and provide up-to-date information to the guidebooks used by the volunteers and backpacker market.

c. International markets

Ghana should focus on its most important international markets **in the short-term: USA, UK, Germany, Netherlands, Scandinavia and West Africa**. The objective is to first raise awareness about Ghana as a tourist destination and then create desire and action to travel to Ghana.

In the international markets, the following key segments should be targeted:

i. Overseas Ghanaians:

- The market size of overseas Ghanaians is considerable. The World Bank estimates that over 900,000 Ghanaians live outside Ghana. Other sources, based on data from Ghanaian embassies, give a higher estimate in the order of 1.5 million, with half of million Ghanaians across **Europe and North America**, and one million living in other African countries. Although a majority of Ghanaian emigrants stay within West Africa, a growing number move to developed countries, especially the US, Germany, Canada, the UK and the Netherlands. In the UK, the Ghanaians constitute the biggest and most established African migrant community.[55] There are many South Americans with Ghanaian roots, especially in Brazil. Targeted awareness building efforts must be made to reach these markets.
- They tend to visit Ghana every two or three years and stay 2 to 4 weeks at their own houses or with their relatives.
- They are motivated by visiting friends and relatives, travelling back to their roots, educational trips for families.
- They can be reached through clubs and associations[56], word-of-mouth and Internet forums and blogs, social media (such as Friends of Ghana), friends and relatives living in Ghana, the Internet and specialised travel agencies. The GTA should be mainly responsible for networking and promoting Ghana to overseas Ghanaians through their clubs and associations. Joint marketing activities with the private sector include representation at selected international trade fairs and organising familiarisation tours to international tour operators and media targeting overseas Ghanaians.

ii. Visitors from neighbouring countries (ECOWAS)

- DINKS, empty nesters and families as described in the section on the domestic markets.
- They can be reached by word-of-mouth and Internet forums and blogs, social media, the Internet, regional travel trade fairs, and articles in national newspapers. The GTA should coordinate these activities, especially press releases with national newspapers in neighbouring countries. Fam tours should be jointly arranged by the GTA and the private sector.

iii. Business travellers:

- They will travel to Ghana to pursue business opportunities.
- They should be targeted to include tourism activities and experiences in the business trip like playing golf, deep sea fishing, and by this increase expenditure spend and possibly length of stay.
- They can be reached by providing information about opportunities to combine business with leisure to enterprises and corporations already established in Ghana (direct sales), by publishing articles in national business related newspapers and magazines, and by word-of-mouth. Direct sales are the responsibility of private sector operators. The GTA should support direct sales

[55] Migrations between Africa and Europe, http://mafeproject.site.ined.fr/en/migratory_systems/mafe_ghana/

[56] For instance the Movement of United Ghanaians Abroad (http://muga.co/index.htm), which is open to all Ghanaians living abroad. This movement could provide a platform for raising awareness about Ghana as a tourist destination, inform about new developments etc.

by articles and travel supplements in national business related newspapers.

Marketing activities in North America, Brazil and Europe should concentrate on building awareness about Ghana as a tourist destination among both the travel trade and the general public. These activities will also raise the interest of stakeholders to start developing specialised tours and to improve the quality of the product to provide more value for money.

5.5.2 Medium-term (2018-2022): Expanding to new international markets while still attracting the consolidated markets and the special interest markets

At this stage, Ghana should have improved and tested the product offer with overseas Ghanaians, expatriates and volunteers, business people and leisure travellers from neighbouring countries. Therefore stakeholders should be ready with their products for more intensified marketing actions aimed at international markets targeting mainly the more experiential travellers (FIT and small group) keen to immerse themselves into the Ghanaian way of life.

Therefore marketing activities should be expanded to include the following market segments while still continuing to target the market segments indicated during in the short-term:

a. Cultural tourists:

- Semi-international (expatriates and volunteers) and international markets (USA, UK, Germany, Netherlands, Scandinavia).
- Usual profile: belong to the 45 to 64 year age group and are females; educated with higher income levels; they spend on consumer products such as souvenirs, arts, crafts and clothing; they combine cultural with non-cultural experiences.
- They are motivated by learning and educational experiences and a sense of people and place.
- They are interested in historical monuments, ruins, excavations, World Heritage Sites; traditional/indigenous communities and their folklore, buildings, livelihoods, handicrafts, shrines; rural estates, interesting villages, cultural landscapes and farming activities; courses and workshops drawing upon authentic local skills (music, handicrafts, languages, natural medicine, dance, food, weaving); traditional places of pilgrimage, sacred places, traditional ceremonies and healing, meditation centres; environmental, agricultural, forestry and social projects, and festivals.
- They can be reached through specific travel agencies, clubs and associations in Ghana (expatriates), guidebooks, travel supplements in major newspapers in the target source markets, the Internet; social media; word-of-mouth and Internet forums and blogs.
- The GTA is responsible for collaborating with the international press and publishers of guidebooks. This requires issuing press releases at regular intervals and providing updated information to guidebook publishers. The GTA can also train key international travel agencies and their personnel through its website and the Internet to help them provide a better service and raise the desire to travel to Ghana among their prospective customers.

b. Nature-based tourists:

- Domestic and international markets (USA, UK, Netherlands, Germany, Scandinavia).
- They come from all demographic groups; in the case of the domestic market the higher income level markets should be targeted.
- They are motivated by natural areas and landscapes, unspoiled and non-crowded places, unique wildlife, interaction with local people and their traditions, education and learning.
- They engage in the following types of key activities: seeing wildlife in their natural settings, camping, soft adventure activities such as trekking, hiking, cycling, horse riding, bird/animal watching, and canoeing.
- They can be reached through specialised travel agencies, clubs and associations in Ghana (expatriates), guidebooks, travel supplements in major newspapers in the target source markets, the Internet, social media, word-of-mouth and Internet forums and blogs.
- The GTA is responsible for the overall promotion and marketing – providing regular press releases and updates to international media and guidebooks. High quality photos and articles are required focusing on nature-based activities at various levels: nature as a backdrop to nature as the main focus.

c. Bird watchers:

- International markets, especially the USA and the UK.
- Specialist birdwatchers with restricted budgets include moderately to highly motivated birdwatchers who are seriously constrained in their activities by financial resources. They are often young singles or couples travelling independently. They are generally well-informed and may be quite adept at stretching their limited budget. They may hire a car and stay at hotels, but these tend to be the cheapest available and for limited durations. They are unlikely to use specialist guides or spend large amounts on specialist birding products. They are, however, committed to their bird watching experience and they have fewer time constraints, which can mean that their overall economic contribution is higher than that of more affluent travellers.
- They can be reached through the Royal Society for the Protection of Birds, UK, bird watching centres and clubs in the US (www.birdingguide.com/clubs/ and http://www.facebook.com/NationalAudubonSociety), local bird watching groups and societies around the world (www.eurobirding.com/links/links.php?topic=94), specialist magazines, specialist travel agencies, social media, Internet; word-of-mouth and Internet forums and blogs.
- The GTA should collaborate closely with specialists on bird watching, NGOs specialising in birds and the private sector who feature bird watching in their portfolio. Articles for the specialised magazines should be written by experienced bird watchers. High quality photos are required, which can be acquired from the NGOs or possibly the Wildlife Division.

d. Adventure travel segment:

- international markets (USA, UK, Netherlands, Germany, Scandinavia); semi-international markets (expatriates and volunteers) and domestic market (more affluent segments, DINKs, small groups of friends).
- A typical adventure traveller is in his/her mid-40s, well educated, and with a relatively large disposable income. Those in their 20s are motivated to take

an adventure trip because of the thrill, those in their 30s to satisfy their interest in the environment and nature and those in their 40s and 50s to get away from job pressures and stress.

- They can be reached through specialised travel agencies, clubs and associations in Ghana (expatriates), guidebooks, travel supplements in major newspapers in the target source markets, specialised travel agencies, the Internet; social media; word-of-mouth and Internet forums and blogs.
- The GTA should work closely with the private sector featuring adventure travel in their portfolios.

At the middle of the medium-term stage, the GTA should conduct market research on new markets in Europe (France, Italy, Spain). Based on the research, awareness raising and presence in these countries should be included in the marketing and promotion activities by the GTA.

5.5.3 Long-term (2023-2027): Further expansion of international market segments as well as special interest markets

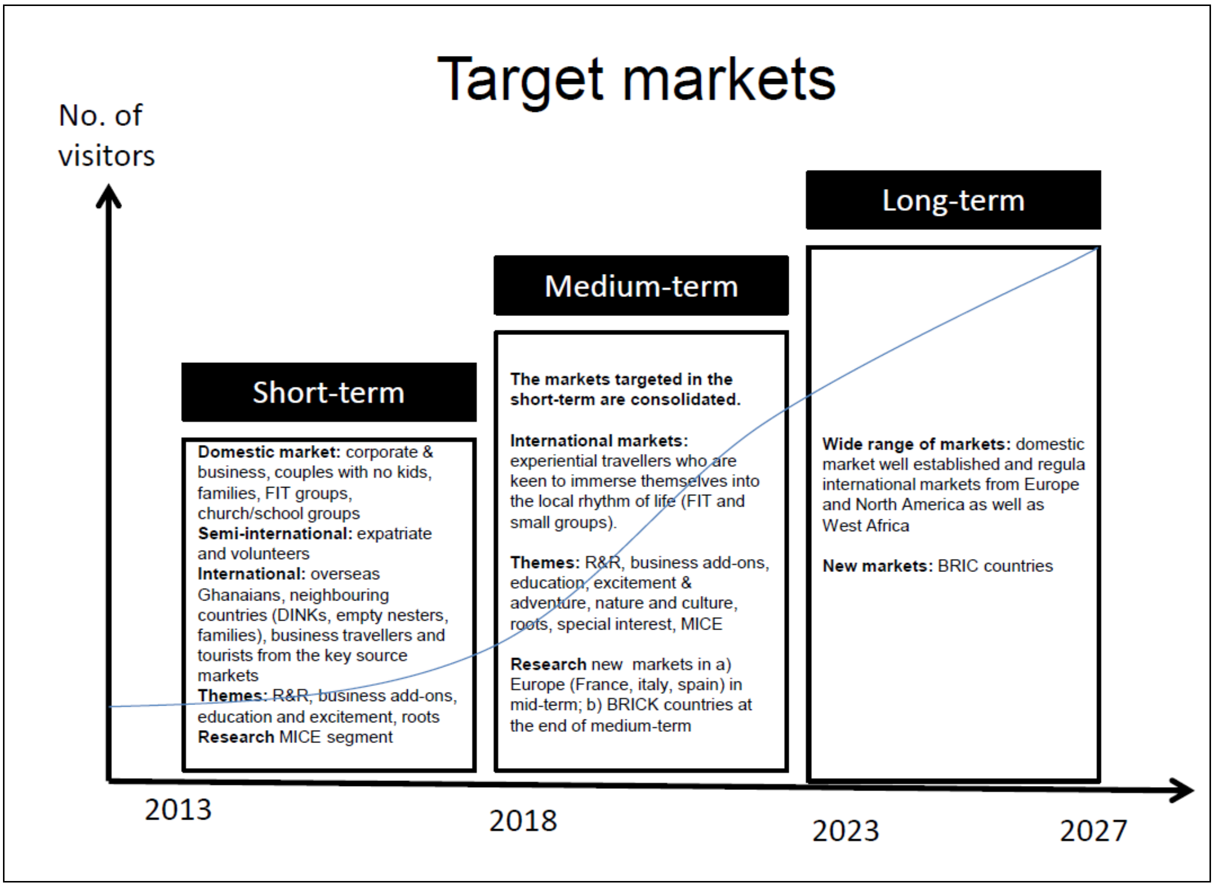
The public-private sector-working group should evaluate the marketing activities on a yearly basis. At the end of each evaluation a more in-depth image and market research should be conducted to analyse a) the effect of the branding strategy and b) the effectiveness of the marketing strategy, actions and promotion.

Towards the end of the medium-term phase, The GTA should arrange an in-depth market research in emerging markets such as the BRIC countries (Brazil, Russia, India, China). Based on the results, the public-private sector-working group should review the marketing strategy, modify and apply it for the long-term phase (2024-2027). At this stage, it is expected that tourists from BRIC countries would be attracted to Ghana:

- as part of multi-destination tour
- because it is a safe and interesting FIT destination (BRIC markets would have matured for FIT travel looking for excitement, entertainment, education)
- because it is a destination offering cultural, natural and adventure experiences

Figure 22 summarises the targeted markets for the short-, medium- and long-term.

Figure 22: Markets to be targeted in the strategy by stages of development



Source: MOT, UNDP, UNECA, UNWTO

5.5.4 Promotional tools and materials

Awareness raising and image building needs a well organised and coordinated promotion involving:

- editorial coverage in appropriate media by the GTA.
- tour operator support - selected tour operators targeting the desired markets and market segments should be assisted by providing them with specific material including photos, information on new developments (responsibility of the GTA).
- the provision of well-designed and quality information via both on a website and in printed collateral materials as well as social media by the GTA.

In order to implement the promotional campaign, the following activities should be undertaken:

a. **Launch a Public Relations (PR) campaign using press releases, information briefings, hosting travel and general feature journalists and TV film crews, celebrity endorsements (e.g. footballers) and publicity events**

The most important activity for Ghana would be hosting familiarisation tours for media and TV crews. Ghana needs to cooperate with the media in order to encourage positive coverage in documentaries, special tourism related TV programmes, travel supplements of major newspapers, and articles in professional magazines. Hosting familiarisation tours (that is coordinating itineraries and encouraging operators to provide hospitality such as transport, accommodation, meals and entertainment) is an important function for the GTA.

This will be a vital activity for Ghana in the short-term since it is the primary means of building awareness of the destination, strengthening the brand, and informing about the progress of tourism development.

Examples of newspapers/magazines and media that should be targeted by GTA:

- Ghanaian newspapers read by the middle and higher income market segments: Weekend Mirror, Weekend Spectator and possibly Ghanaian Times, Weekend Globe, Business & Financial Times
- Frankfurter Allgemainer Weekend Travel Supplement
- Atlas and National Geographic Magazines
- Birdwatch, Birdwatching Magazines

- National TV such as TV3 and radio channels such as Joy FM, Citi FM, Atlantis Radio
- Local media in the regions to raise awareness of the general public on tourism, inform the public and stakeholders about new developments, build up the commitment of the local communities to tourism development, increase the self-esteem of local participants and achievers in tourism development

b. Conduct advertising and promotion for the travel trade including familiarisation tours, trade shows/fairs, tour operator/travel agent presentations, tour operator support, and trade advertising

i. Familiarisation trips (fam tours) for travel trade representatives

There is a need for educational trips for tour operators and travel agents. These trips should be organised in regular intervals. The cost of these trips should be jointly covered by both the private and public sectors (e.g. hotels providing the rooms, transport companies providing transport and so on…). Fam tours should also be used to gather proper feedback from the participants. This information is especially valuable for product development.

ii. Trade shows/fairs

Participation at selected trade exhibitions held in primary source markets is crucial. Joint participation (GTA and private sector) should be supported.

The list of recommended travel trade fairs to attend in the short and medium-term:

- World Travel Market (WTM), UK
- Internationale Tourismus-Börse (ITB) Berlin, Germany
- International Adventure Travel & Outdoor Sports Show (IATOS), USA
- One fair in Scandinavia (this could be on a rotating basis): MATKO in Helsinki, Finland and/or TUR in Gothenburg, Sweden
- Vakatienburs, the Netherlands
- Akwaaba, Nigeria

Trade shows should always be evaluated on the basis of the performance and potential of the market versus the associated costs of participation. The GTA should report the evaluation to the public-private sector-working group.

iii. Tour operator/travel agent presentations

Seminars and workshops for selected travel trade personnel should be given high priority and should be organised by the GTA in conjunction with participation at trade exhibitions and fairs, especially overseas.

iv. Tour operator support

Tour operator support is the responsibility of the GTA. Materials and information to assist tour operators in their programme formulation should be made available e.g. copies of collaterals, photos, videos, should be prepared and a specific section for the travel trade on the GTA website reserved. National and provincial tourism authorities should also be ready to respond to the travel trade’s requests and proposals for features to be included on their tourism websites.

v. Trade advertising

Some travel trade advertising will be required in all identified key markets to reinforce trade awareness and acceptance of Ghana that is serious in developing and promoting itself as a tourism destination. Trade advertising should be organised by GTA in accordance with the action plan approved by the public-private sector-working group.

c. Conduct advertising and promotion for the public

Consumer focused marketing can be highly expensive and ineffective unless properly targeted. The general public needs to know about Ghana, what it has to offer, and to find out about its attractive offers. The travel trade needs to be encouraged to respond positively to rising consumer interest in Ghana by designing and offering tour programmes and travel arrangements. This objective could be met by advertising in specialist media, direct mail shots, website and social media development, and brochure production and distribution. Other activities would include public relations. The main responsibility lies with the GTA.

i. Collaterals

The availability of collateral materials on Ghana that present appropriate information using the designated image and standard slogans, symbols, icons etc. as agreed in Ghana's tourism branding strategy is a priority of the marketing programme. It is recommended that the following collateral materials be produced by the GTA. They should have strong graphic appeal and be printed on high quality paper in full colour:

- **destination information booklet**

- **shell folder** – high quality to be used as a press pack for visiting travel writers, and travel trade familiarisation trip visitors. If there are budget limitations, this could be done in electronic format and copied into USBs and/or in the travel trade/media section of the website

- **postcards** as per the branding strategy and guidelines – could also be done in electronic form and used in social media (relates to word-of-mouth/Internet forums and blogs, recollection/memorabilia for the writer); and

- **posters** of sites, activities and events giving strong visual appeal.

The material should first be produced, preferably by overlay, in English.

In addition to this collateral material, it is proposed that the GTA develops a 'Stay Another Day in Ghana' brochure in close collaboration with local initiatives supporting local income generation and environmental sustainability. The International Finance Corporation (IFC) and GIZ, the German development agency, should be approached by the GTA to fund the brochure. Its purpose would be to:

- extend the length of stay of tourists who already come to Ghana – the brochure should be placed in guesthouses, hotels in Ghana, especially in Accra and Kumasi (a win-win situation: if tourists stay an extra night and visit the places mentioned in the brochure) as well as to the visitor information centres
- promote initiatives which benefit the poor, local communities and disadvantaged groups
- increase the income earning opportunities of these initiatives.

Examples of initiatives to promote in the Stay Another Day in Ghana campaign include

- Craft villages (handicrafts, evening entertainment, snacks)
- NGO supported initiatives around the country

The selection of these initiatives should be based on a set of criteria mutually agreed by the public and private sectors and by civil society.

Most of the above collaterals would either directly or indirectly have an impact on income generation and employment by prompting more travellers to local initiatives, local villages and local consumption patterns.

The collaterals should also be downloadable from Ghana's official website.

ii. Videos

Short videos on Ghana have already been produced. However, these should be reviewed by the public-private sector-working group and revised to be in line with the branding strategy. Therefore in the short-term:

new short video should be produced to introduce Ghana as a place where tourists can share the rhythm of Ghanaians specialised short videos on a) city breaks (targeting neighbouring countries), b) festivals, c) soft adventures should be produced

In the medium-term, depending on the speed of implementation of product improvement and development, a video on the 'great circular tour' (Volta Lake, Tamale and Mole, Kumasi, Cape Coast, Accra) should be produced. The GTA should take the main responsibility in organising the production of the videos.

Videos produced in late medium to early long-term should show all the experiences that Ghana has to offer.

iii. Social media

Private sector tourism operators, whether in travel agency or accommodation business, should be encouraged to adopt social media technologies by the GTA. The following are the most important free to use and embeddable social media networks that should be considered and could help the private sector successfully market their business online and distinguish themselves from the competitors: YouTube, TripAdvisor, and Google Maps. Other important networks should be identified by asking customers which online social networks they belong to. The content in these social media platforms should be created keeping the requirements of the target segment in mind. In addition, the target market(s) should be encouraged to visit the website to book the product.

Other social media to use include:

- **facebook (www.facebook.com)**
- web albums: Flickr (**www.flickr.com**) and Picasa Web Albums (**http://picasaweb.google.com**) – displaying property or tour photos on online photo management sites will increase the exposure of the product
- podcasting – a podcast is a media file (generally audio) that is distributed over the Internet. Podcasting is a very good medium to increase brand awareness by providing informative and educational content.
- blogging
- twitter – one of the most popular social networking and interactive micro-blogging service. Tourism business can use Twitter to keep up with industry news, build industry contacts, gain brand exposure, monitor online reputation and engage with fans and prospects, share quirky facts about what happened for instance on a tour on a daily basis.

The list above is not an exhaustive list. The following website will provide info on more that 350 social networking sites
http://mashable.com/2007/10/23/social-networking-god/.

In order to measure the success of a social media strategy, objectives should be set and evaluated on a monthly basis.

There are also private companies who are assisting small and medium sized tourism companies to set up their websites and social media strategies; see for example **www.springnest.com**.

The GTA together with the private sector associations (tour operator association, hotel and restaurant association) should organise training for the private sector companies to launch their websites and social media strategies.

iv. Website

Ghana should only have one official tourism website. Therefore the www.touringghana.com, which currently identifies itself as the official website, should remain and the www.ghana.travel should be taken down.

The website design should adopt the branding strategy and follow the customer journey approach:

- ***dream and plan:*** an interactive route planner should be provided; special events should be highlighted to encourage last minute decisions to choose Ghana as a tourist destination
- ***book:*** the website should be a place where prospective customers get enough information to make their decision and then act upon the decision. www.touringghana.com currently lists tour operators through which booking is possible but a lot of contact details are missing, especially e-mail addresses, and some contact details are be out-of-date. Therefore an update is absolutely necessary
- ***visit:*** virtual tours and videos should be included on the official website. These should follow the branding strategy and promote the brand values and messages
- ***post-visit recollection and recommendation:*** the official website should have a section which supports word-of-mouth marketing including photos, links to social media, news on new developments, activities. Sites to attract revisits are limited

It is recommended that the GTA develops a specific section for the travel trade and the media in the website. This way Ghana would be able to better manage its brand identity, values and messages. In the travel trade section there should be:

- ***a photo bank*** – professional photos that support the brand values and messages. These could be used by the travel trade in their brochures and websites when featuring Ghana.
- ***training packages*** for the travel trade sales personnel to learn more about Ghana (e.g. Australia is training its Aussie specialists through the web) and keep them up-to-date on the developments. Thus the sales personnel would be able to better give accurate information about Ghana to prospective customers.
- ***press releases*** – attractive articles and press releases for the use of domestic and international press and media.

v. Consumer advertising and direct mail

No general consumer advertising is proposed in overseas markets; the only consumer advertising recommended is small-scale and directed at those publications aimed at specific market segments and niches identified, in particular overseas adventure and nature clubs. The GTA in close collaboration with the travel trade should organise this.

Societies, clubs and associations should be approached to obtain membership lists. These can then be used in a focused and targeted direct mail campaign or to arrange specific presentations to their members. The journals, newsletters and e-newsletters of these bodies, as well as magazines and other media aimed at the target segments are the appropriate type of media to be considered for the limited recommended programme of consumer advertising.

In addition to the above, the overseas representations of Ghana (embassies) should be provided with accurate information on the present situation and future development plans as well as promotional materials for Ghana.

5.5.5 Institutional arrangements for collaboration

As stated in the situation analysis, **public-private partnership** in tourism should be intensified. Currently, certain four and five star hotels have formulated their own group and do not participate in the joint activities on a regular basis. These should be encouraged to work with other private sector associations and with the public sector.

Marketing and promotion is an area where joint public and private sector activities:

- support the goal of maximising tourism contribution to Ghana's development
- improve Ghana's position as a desired destination among the targeted source markets and market segments
- contribute to the image building and branding of Ghana
- facilitate consistency in marketing and promoting Ghana
- foster partnerships and joint initiatives in marketing and promotion.

The public-private sector-working group (not a political body but rather a technical level body) should meet four times a year during the first five years of the strategy and twice a year in the medium and long-term. The working group should plan and monitor joint marketing and promotion action plan. In the action plan the roles and responsibilities between participants will be allocated and tasks divided. The members of the working group should include government, private sector associations and private sector members.

5.6 Target market projections

In setting the target volumes and growth rates for Ghana, the following factors should be taken into account:

a. Past trends and current situation:

i. Domestic markets:

- the number of Ghanaians and residents visiting major sites rose roughly 5 per cent in 2011.
- the middle and higher income earners' segments are growing in Ghana[57]

ii. International arrivals and purpose of visit:

- the statistical information on international arrivals differs from source to source. The statistics provided by immigration has been used as the baseline for the projections.
- the average annual growth rate (ECOWAS and other international; excluding Ghanaian arrivals) between 2000 and 2011 was 5 per cent , based on the Ghana Immigration Service's statistics; during the last five years the average annual growth rate was 10 per cent .
- the source markets have not changed significantly during 2005-2011. In 2011, the market share of the neighbouring countries was 30 per cent, Europe around 20 per cent, North America 16 per cent and the rest 34 per cent.
- the main purposes of visitation are as follows: 40 per cent professional-related travel (business, conferences, study/training), 25 per cent visiting friends and relatives, 19 per cent holiday/leisure, 10 per cent transit and 6 per cent other.

iii. Length of stay and use of commercial accommodation:

- ***domestic:*** most are excursionists (60%) and they do not stay overnight; 40 per cent of the domestic market stays overnight, of which 60 per cent are business, 35 per cent VFR and 5 per cent leisure/holiday. Business and leisure travellers use commercial accommodation, mainly guesthouses and 2 and 3 star hotels. The length of stay of business travellers is estimated to be 3 nights while leisure travellers spend 2 nights in commercial accommodation

- ***international business segment:*** this segment can be divided into short-term stay (70% of the total) and long-term stay (30%). International business visitors on short-term stay spend on 3 nights (arriving Monday, leaving Thursday evening). The length of stay for long-term business travellers is considered to be two work months i.e. 50 nights. These people stay at good quality guesthouses or long-term rented apartments. The percentage for those using guesthouses and 2 and 3 star hotels is estimated at 20 per cent

- ***international holiday/leisure:*** their average length of stay based on the tour packages offered is 7 nights; however budget FIT travellers may stay longer. Therefore it is estimated that international leisure tourists stay 10 nights on average at present

[57] The land and real estate developers estimate the middle income earners segment is growing at 7% a year while senior manager and rich and famous segments at 5% and 4% respectively.

- ***overseas Ghanaians:*** very few use commercial accommodation as most of them (95%) still have houses in Ghana or they stay with their relatives and friends. Therefore it is expected that at most 5 per cent use commercial accommodation. Those visiting friends and relatives tend to stay longer, between 2 and 4 weeks while those staying in commercial accommodation are expected to stay less than two weeks, estimated at 10 nights

- ***transit visitors:*** a transit visa allows a visitor 48 hours to pass through Ghana. It is estimated that 50 per cent stay one night using commercial accommodation and 50 per cent continue their travel the same day.

b. Expected effects due to the branding, marketing and overall product development activities:

i. Short-term, by the end of 2017:

- the domestic market and their travel behaviour will change as the economy grows and disposable income increase. The major source markets are Greater Accra, the Ashanti and the Central regions. By the end of 2017, domestic excursionists (same day tourists) will still account for 60 per cent and those staying overnight (tourists) will account for 40 per cent. Of those staying overnight, leisure and holiday tourists will account for 10 per cent and VFR 90 per cent. It is expected that leisure tourists will use commercial accommodation for 2 nights
- international arrivals are expected to increase at an average annual growth rate of 14 per cent in 2012 and 15 per cent between 2013 and 2017
- the major source markets will still account for 64 per cent of total international visitors: Nigeria (23%), the US (13%), UK (10%), Cote d'Ivoire (6%), India (3%), Germany (3%), South Africa (3%) and the Netherlands (3%). The neighbouring countries will increase their market share due to the branding and marketing activities and they are expected to account for 35 per cent of international visitors. Europe will still remain around 20 per cent, North America around 15 per cent and the rest of the world 30 per cent
- because of the economic and stable political situation, international business travel is still expected to lead the growth of visitor numbers and it will increase its market share from 40 per cent at present to 45 per cent in 2017. The length of stay target is 3 nights
- the international VFR segment (overseas Ghanaians) has shown stagnation in the past and is expected to decrease in the short-term future from the current 25 per cent market share to 20 per cent in 2017. Only 5 per cent of the VFR segment is expected to use commercial accommodation. Their length of stay will still be10 nights
- the international leisure/holiday segment will increase to 25 per cent from the current 19-20 per cent. This increase in market share will be mainly due to the intensified marketing activities targeting neighbouring countries (rest and relaxation, city breaks). This segment is expected to use commercial accommodation for 10 nights
- the rest accounting for 10 per cent of the market are considered to be transit visitors of which 50 per cent stay overnight and 50 per cent continue their travel the same day. Average length of stay 1 night
- average expenditure per tourist per trip is expected to increase from USD 1,400 in 2,012 to USD 1,725 in 2017 (see the projected key economic impact indicators 2013-2017)

ii. Medium-term, by the end of 2022:

- the domestic market will have matured and therefore the share of day-trippers will have dropped slightly to 55 per cent and the overnight tourist segment will have increased its market share to 45 per cent. Of the overnight tourists the leisure and holiday will account for 15 per cent and VFR 85 per cent. The leisure and holiday segment is expected to use commercial accommodation for 3 nights
- international arrivals will continue to increase at 16 per cent on average annually between 2018-2022
- because of the proposed branding and marketing activities the market share of European and North American markets will increase to 25 per cent and 20 per cent respectively; neighbouring countries should remain at 35 per cent; and the rest at 20 per cent.
- the international business travel segment is expected to maintain its strong hold accounting for 45 per cent of market share. Of these 80 per cent stay 4 nights and 20 per cent 50 nights. They are the users of high-category commercial accommodation.
- because of the intensified marketing and product development targeting leisure tourism, the international holiday and leisure segment will gain market share at the expense of VFR. The leisure market's share of is expected to be 35 per cent and these visitors are expected to use commercial accommodation for 10 nights, which by international comparisons is long
- the international VFR segment's share will decrease to 15 per cent, of which only 5 per cent will use commercial accommodation for an average 10 nights
- transit visitors will account for 5 per cent, of which 50 per cent stay overnight in commercial establishments
- a more precise segmentation based on purpose of visit can be carried out once and improved statistical and market research system is put in place
- average expenditure per tourist per trip is expected to increase from USD 1,500 in 2017 to USD 1.660 in 2022 (see the projected key economic impact indicators 2018-2023).

iii. Long-term, by the end of 2027:

- by the end of 2027, the source markets would have stabilised and the structure will be as follows: neighbouring countries will account for 35 per cent, Europe for 25 per cent, North America for 20 per cent, and the rest of the world for 20 per cent including the BRIC countries.
- the international business segment is expected to stabilise at around 40 per cent.
- the international holiday/leisure will reach 40 per cent while VFR and others will remain at 15 per cent and 5 per cent respectively.

5.7 Improving economic performance of the tourism sector

A brief analysis of the Ghanaian Tourism economy was undertaken in sub-sections 2.2.1 and 2.2.2 *the* state of affairs in the tourism industry before the 1996-2010 Plan and the outcomes during the plan implementation period were considered. Essentially, the Plan outcomes showed that it was a *sine qua non* for tourism development in particular and the macroeconomic growth and development of the country in general. In other word, there is every indication that, tourism growth is very necessary for the growth of the industry and the economy in as a whole.

Ghana benefits from various external commodity trades ranging from the Cocoa, Gold and other Minerals, the newly found Oil and Gas, other Non-Traditional Commodities and Services including Tourism. Maximising foreign exchange earnings from these international transactions require concerted efforts to develop the individual activities, ensure sustainability and improve upon the international competitiveness of the trade activities.

The relative trade shares of the various international trading activities as depicted in Table 30 revealed a keen competition between the top two foreign exchange earners. It is worth noting, however, that the nation risks sustainable growth and development in the future by rallying all supports, resources and investment behind “tradable commodities” that are exhaustible and will eventually get exhausted some years to come. Tourism, which has received little attention, resources and investment over the years, has been classified as being an inexhaustible “tradable” service. Managed in a sustainable fashion, it is one of the key sectors, which will hold the future of the economy when some of the tradable commodities especially oil and gas are exhausted.

Currently, as shown in Table 30, the tourism sector occupies the third position (excluding remittances) in the sectoral share of foreign exchange earnings in the economy. However, as the oil and gas economy grows, tourism’s position may decline. This makes the case for public and private sector actors to collaborate effectively to device strategies that will enhance the growth of the sector.

Table 30: External trade, tourism receipts and comparative trade shares (Million $), 1995-2011

Year	**Items**														**Relative Trade Shares**			
	Gross Export (GX)	% Δ	MerX	% Δ	MinX	% Δ	Cocoa X	% Δ	NTE	% Δ	**TourR**	% Δ	MerM mil$	% Δ	MinX /GX	Cocoa /GX	**TourR /GX**	NTE /GX
1995	1581.8		1431.2		678.8		389.5		100		**233.2**		1687.8		42.9	24.6	**14.7**	6.3
1996	2223.9	40.6	1570.1	9.7	641.4	-5.5	552.1	41.7	143.6	43.6	**248.8**	6.7	1950.7	15.6	28.8	24.8	**11.2**	6.5
1997	2231.1	0.3	1489.9	-5.1	613	-4.4	470	-14.9	157.69	9.8	**265.6**	6.7	2143.7	9.9	27.5	21.1	**11.9**	7.1
1998	2531.6	13.5	2090.8	40.3	717.8	17.1	620.4	32	228	44.6	**284.0**	6.9	2991.6	39.6	28.4	24.5	**11.2**	9.0
1999	2473.2	-2.3	2005.5	-4.1	749.1	4.4	552.3	-11	234.57	2.9	**304.1**	7.1	3279.9	9.6	30.3	22.3	**12.3**	9.5
2000	2429.1	-1.8	1936.3	-3.5	755.9	0.9	437.1	-20.9	400.7	70.8	**289.5**	26.9	2766.6	-15.7	31.1	18.0	**11.9**	16.5
2001	2401.5	-1.1	1867.1	-3.6	691.4	-8.5	382.7	-12.4	459.6	14.7	**335.9**	16	2968.5	7.3	28.8	15.9	**14.0**	19.1
2002	2625	9.3	2015.2	7.9	753.9	9	474.4	24	504.3	9.7	**389.7**	16	2707	-8.8	28.7	18.1	**14.8**	19.2
2003	3101.4	18.2	2562.4	27.2	893.7	18.5	817.7	72.4	689.4	36.7	**452.1**	16	3232.8	19.4	28.8	26.4	**14.6**	22.2
2004	3486.9	12.4	2704.5	5.5	904.5	1.2	1025.7	25.4	705.6	2.3	**487.0**	7.7	4297.3	32.9	25.9	29.4	**14.0**	20.2
2005	3907.5	12.1	2802.2	3.6	1034.8	14.4	908.4	-11.4	777.6	10.2	**627.1**	28.8	5347.3	24.4	26.5	23.2	**16.0**	19.9
2006	5136.4	31.4	3726.7	33	1371.8	32.6	1187.4	30.7	892.9	14.8	**740.1**	18	6753.7	26.3	26.7	23.1	**14.4**	17.4
2007	6041.1	17.6	4172.1	12	1795.6	30.9	1132.6	-4.6	1164.5	30.4	**879.0**	18.8	8066.1	19.4	29.7	18.7	**14.6**	19.3
2008	7140.1	18.2	5269.7	26.3	2321.1	29.3	1487	31.3	1340.9	15.1	**1052.3**	19.7	10268.5	27.3	32.5	20.8	**14.7**	18.8
2009	7609.4	6.6	5839.7	10.8	2608.1	12.4	1866	25.5	1216.6	-9.3	**1211.4**	15.1	8046.3	-21.6	34.3	24.5	**15.9**	16.0
2010	9460.9	24.3	-	-	-	-	-	-	-	-	**1406.3**	16.1	10922.1	35.7	-	-	**14.9**	-
2011	14594	54.3	-	-	-	-	-	-	-	-	**1634.3**	16.2	-	-	-	-	**11.2**	-

% Δ – Percentage change
NTX – Non-Traditional Export
MerX – Merchandise Export
TourR – Tourism Receipts
MinX – Mineral Export
CocoaX – Cocoa Export

Source: WDI, GSS, GTA and Consultant's calculations

5.7.1 The way forward

At this juncture, it is appropriate to put the over-riding importance of tourism development in the right perspective by the following propositions.

a. Fundamental Proposition

The tourism sector is a fast growing and sustainable economic activity worldwide according to the UNWTO. It is labour-absorbing (intensive) and carries crucial economic growth and development implications such as employment creation, built-in poverty reduction characteristics and, consequently, foreign exchange generation, Roe et. al (2004). Due to its labour-intensity, developing the sector is an optimal policy option for accelerated growth and development because labour is the most abundant factor of production in Ghana, GSGDA. It is, therefore, imperative that both public and private sector investible funds be channelled into its development. The concept of the multiplier effects of potential outcomes must constitute an integral part of the policy evaluation process.

Modus Operandi: Sustainable development planning to ensure that the benefits outlined earlier in sub-section 2.2.2 are enhanced and expanded.

b. The Strategic Directions of Government

A sectoral policy that is to be marketable against the backdrop in face of budgetary resource scarcities must take due cognisance of central government priorities. The ***priorities of government***, as expressed in the policy document **G*hana Shared Growth and Development Agenda (GSGDA) 2010-2013,*** include, *inter alia*, the following thematic considerations:

- *Ensuring and sustaining macroeconomic stability;*
- ***<u>Enhanced competitiveness of Ghana's private sector;</u>***
- *Accelerated agricultural modernisation and natural resource management;*
- *Oil and gas development;*
- *Infrastructure, energy and human settlements development;*
- *Human development, employm*ent and productivity; and
- *Transparent and Accountable Governance.*[58]

Tourism's importance is embedded in the second theme (underlined above for emphasis) where the document states, *inter alia,* the need for **'the development of the tourism industry, and the promotion of the Creative Industry'**. The latter is a key input in the tourism industry.

c. Key medium-term macroeconomic growth targets and underlying assumptions

Government has targeted a medium term per capita of at least USD 1, 035 by 2013 and the projected non-oil average GDP growth rate of 7 per cent per annum and an oil inclusive average real GDP growth rate of at least 9 per cent (GSGDA). Its long term per capita income target is at least USD 3,000 by the year 2020. The above growth targets are based on the following assumptions;

[58] Source: GSGDA, Dec. 2010

- *The population growth rate will not exceed 2.2 per cent per annum;*
- *Inflation rate is contained within single digit; and*
- *Stable foreign exchange rate*[59]*.*

d. Selected macro-economic indicators and the need for tourism development

Government's stated goals and priorities could be assumed to take their roots from the trends in some of the macroeconomic variables in Table 31 below. The annual growth rates of the past decade have been viewed as inadequate to substantially reduce the incidence of poverty for example, to meet the Millennium Development Goals (MDGs) targets. Inflationary levels, the budgetary deficits and heavy dependent on cocoa and mineral earnings have been deemed inadequate for sustainable development and, hence, the need to prioritise other sources of foreign exchange generation. It is in this respect that a case is being strongly made for the development of the tourism sector.

e. Economic growth, poverty and tourism development nexus

Adam Smith, Father of Economics, pointed out in 1776 that *"No society can surely be flourishing and happy, of which by far the greater part of the numbers are poor and miserable."* Such a powerful observation from the ultimate proponent of the power of market forces should catch the attention of all politicians and policy makers who desire the rapid growth and development of their economies. Smith's view has been further reinforced in recent years by making poverty reduction the most critical cornerstone of the Millennium Development Goals (MDGs), the Human Development Report (1997] and Ghana Poverty Reduction Strategy I & II. Tourism's potentials of creating employment and generating higher income levels in the macro-economy has been analysed in the economic impact study above. It is in the light of the above that tourism development can be considered as not only an engine of economic growth, but also as one of the most effective strategies for poverty reduction in Ghana.

Various empirical studies confirm tourism development as an economic engine of growth and a reliable source of poverty reduction. In this regard, The UNWTO's (2006) identification of the following seven ways in which tourism can contribute to poverty reduction in developing countries is relevant to the Ghanaian situation:

- Foreign exchange earnings (export and GDP)
- Employment and Income (direct, indirect and induced)
- Ownership and management of tourism establishments (e.g. hotel, handicraft shops and restaurants)
- Direct sales of goods and services to tourists (e.g. hawking and tour guiding)
- Supply of goods and services to tourism enterprises by the poor (e.g. vegetables and poultry products)
- Investment in infrastructure which provides livelihood benefits to the poor (roads, water and electricity supply) and
- Development of cultural values

[59] Source: GSGDA, Dec. 2010

5.7.2 Pro-poor tourism policy

In general, the macro-economic performance and the socio-economic structure of the economy will require that the poverty problem, in the context of tourism, must be tackled in the following two ways

Using tourism to tackle destination poverty

After identifying the poor at the tourist destination, there is a need for targeted policy is put in place to enable the poor participate actively in tourism and take advantage of available opportunities created by the industry. Direct and indirect employment of the poor at tourism destinations production and supply of goods and services to tourists and tourist facilities needs to be promoted. Joel Sonne, in his doctoral thesis, *The Role of Tourism in Poverty Reduction in Elmina, Ghana*, 2010, concluded that, tourism development has positive correlation with improvement in infrastructure and social amenities in Elmina, resulting in easier movement of goods and people, creation of jobs, though in limited quantity, in the construction industry, hotels, restaurants, chop bars, handicrafts and fishing related activities among others.

In policy terms, the thesis also identifies the following approaches as providing feasible solutions to the poverty problems in Elmina. Some of these solutions can be adopted, adapted and applied to other locations with similar socio-economic and environmental conditions.

- One of the major obstacles to overcome in order to use tourism for poverty reduction is to change the approach from 'top-down' policy planning. Despite the implementation of decentralisation processes in Ghana, policy processes remain 'top-down'. Occasionally, there are consultations with stakeholders about policy, but these never include any representation for poor people, whose views are not considered in the final decisions by policy-makers. It is recommended that a sustainable approach to tourism development be adopted, which recognises the central role of local people in policy and programmes formulation and implementation at national, regional and local levels. Sustainable development principles emphasis poverty-focused development, focusing on giving 'voices' to local people, a responsive and participatory process, inter-relationship at national and local levels, and economic and social factors affecting livelihood activities and decision-making

- The need for policy mechanism that aims at developing and strengthening institutions and promoting inter-relationships among stakeholders give voice to local people. Such institutions could be a wealthy non-governmental organisation which may have the resources to stimulate economic livelihood opportunities through micro-finance and empower local people and governmental bodies to assess and access a variety of tourism and poverty reduction policy and planning options in Elmina

- The need to remove barriers causing local people's marginalisation and exclusion from opportunities in the tourism industry and market. Although tourism has the potential to create economic and non-economic opportunities for the local people through stimulation of small business, employment and decision-making opportunities, there are several barriers that need to be overcome through government policy interventions and actions by donors, non-governmental organisations and the private sector. This include building capacity and access to training, creating for credit, diversifying tourism products and markets

- The existing lack of clear structure for the planning and development of tourism and the uncoordinated actions of different stakeholders need to be overcome to allow the potential socio-economic benefits of tourism to be realised. It is suggested that non-governmental organisations should be encouraged operate in the tourism sector and relieve government agencies of the burden of tourism policy and planning and emphasis partnership with local people in local communities

- Tourism's potential for poverty reduction cannot be realised until there is a development paradigm shift from macro-economic oriented goals to poverty-focused livelihood opportunities and decision-making process at the local levels

Table 31: Selected key macroeconomic indicators, (2001-2010)

Indicators	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Economic growth (%)	4.0	4.5	5.2	5.6	5.9	6.4	6.5	8.4	4	7.7
Inflation (Ann. Avg)	32.9	14.8	26.7	12.6	15.1	10.9	10.7	16.5	19.3	10.7
Gov't Rev. (GHc 'mil)	689.3	880.0	1,307.7	1,894.3	2,304	2,542.8	3,627.6	4,736.3	5,642.8	7,685.1
Gov't Exp. (GHc'mil)	712.4	978.7	1,456.8	1,875.7	2,212.3	2,921.9	4,136.6	6,200.5	6,597.8	9,280.9
Deficit/Surplus	-23.1	-98.7	-149.1	18.6	91.7	-379.1	-509	-1,464.2	-955	-1,595.8
Export	1,867.1	2,015.2	2,562.4	2,704.5	2,802.2	3,726.7	4,172.1	5,269.7	5,839.7	
Cocoa	382.7	474.4	817.7	1,025.7	908.4	1,187.4	1,132.6	1,487	1,866	
Minerals	691.4	753.9	893.7	904.5	1,034.8	1,371.8	1,795.6	2,321.1	2,608.1	
Non-Traditional	459.6	504.3	689.4	705.6	777.6	892.9	1,164.5	1,340.9	1,216.6	
import ($mil)	3,441.0	3,379.9	4,315.9	5,355.7	6,616.8	8,304.2	10,057.2	12,690.1	10,989.4	13,264.6
BOP ($ mil)	249.1	-18.9	24.9	99.4	-93.4					

Source: WDI and GSS

Note: Ann. Avg – Annual Average
Gov't Rev. – Government Revenue excluding Grants
Gov't Exp. – Government Expenditure
BOP – Balance of Payment

5.7.3 Development of the sector

The process of accelerated development of the sector will require another 15-year Development Plan that draws on the strengths and weaknesses of the previous Plan as well as the opportunities within and threats to the macro economy. It is against this backdrop that the following economic impact goals have been identified as the underlying issues to be addressed

a. Goals to maximise the economic impact of tourism:

Maximising tourism contributions to the economic development of Ghana will be achieved by:

- formulating policies and providing enabling environment that will maximise tourist arrivals
- ensuring the availability of tourism data and information to accurately identify and determine the extent of economic impact
- linking tourism to other sectors such as agriculture and manufacturing to raise the value and supply chains to induce tourists' longer stay and higher expenditure;
- ensuring an efficient and effective financial system in order to minimise exchange rate volatility through importation of goods which could be produced locally;
- promoting the use of local inputs to minimise foreign exchange leakages;
- upgrading skills of the industry's workforce in order to enhance their professionalism and earnings;
- formulating optimal tax policies to ensure compliance from the industry's players; and
- providing appropriate tax incentives and/or subsidies to promote investment in the industry which will, in turn, raise tourism impact on the economy
- facilitating the investment environment
- incorporating a poverty-focus into tourism policy
- emphasising local people's priorities and circumstances in the planning of all tourism projects and programmes
- improving opportunities for the wider involvement of communities in the supply and value chains of tourism products and services, through training and skill development, institutional improvement and micro-financing
- increasing access to training and skills for women, the youth, the unemployed and the handicapped

5.7.4 Projection of key tourism indicators

For an effective planning mechanism, accurate projections of key variables are central to the overall success of the plan. The statistical base year must have adequate and reliable data for projections. Although the base year for the Plan is 2013, the year 2010 is being used as the data base because of the data gaps and/or non-reliability of the data in 2011 and 2012. Actual instead of estimated values are obtainable in 2010 to set the criteria for projections for 2013 and beyond. Both endogenous and exogenous factors will be factored into the projection coefficients, at least, indirectly. Some of the endogenous factors taken into account include the real economic growth rate, inflation, interest and exchange rates and employment rate. Some exogenous factors include BOP, commodity terms of trade, external oil price and the economic performance of some trading partners especially the USA and the UK. It must be noted that 2010 provides an additional advantage as the terminal year of the 1996-2010 Plan. The degree of accuracy of the projections of the indicators by the terminal year, 2010, in the previous plan provides justification for the year as the data base year, For example, the 1996 projection of the real economic growth rate at about 8 per cent for 2010 was virtually what was recorded. 231 shows the projected impact indicators.

a. Fundamental assumption and criteria for projections

1. ***Positive trends:*** Positive trends in tourist arrivals will continue without reaching a global maximum/optimum (Taylor series) by the terminal year (2027).

   Justification**:** The on-going economic growth trends, the macro-economic adjustments underway plus the prospective revenue generations from resource discoveries should provide the enabling environment for accelerated growth of the economy in general and the tourism sector in particular.

2. In view of the indeterminacy of global economic trends in commodity prices, global financial and domestic politico-economic stability, a conservative estimation and analysis are assumed to be appropriate

b. Projection criteria and trials

The availability of the 1996-2010 Plan outcomes provided base data values to formulate dependable projection criteria for the 2013-2027 Plan. Various trials were undertaken including the period average values of the Phase 3 of the 1996-2010 Plan. However, the best outcomes were provided by the 2010 outcomes and government's projected macro-economic variables in emerging oil economy, especially the economic growth rate of at least 9 per cent for 2013. Details of the criteria for projection are outlined in Appendix 5.7.1.

Table 32: Projected key economic impact indicators (2013-2027)

Indicator	Projections									
	2010	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2022**	**2027**
GDP at current mkt prices										
Million GH¢	46,042.6	59,264	63,412.5	68,485.5	73,964.3	79,881.5	86,272	93,173.7	143,359.3	220,576.1
Million US $	32,887.6	39,509.3	35,229.2	40,285.6	43,508.4	46,989.1	50,748.2	54,808.1	89,599.6	147,050.7
Growth rate (%)	7.7	14.4	7.0	8.0	8.0	8.0	8.0	8.0	9.0	9.0
Exp. Exchange Rate	1.4	1.5	1.8	1.7	1.7	1.7	1.7	1.7	1.6	1.5
Arrivals ('000)	746.5	821.2	903.3	993.6	1093.0	1202.2	1322.5	1454.7	2451.3	4320.0
% Change	11.9	10.00	10.00	10.00	10.00	10.00	10.00	10.00	11.00	12.00
Receipts (US $'mil)	1,406.3	1,548.3	1,704.7	1,876.9	2,066.5	2,275.2	2,505.0	2,758.0	4,689.4	8,375.5
% Change	16.1	10.1	10.1	10.1	10.1	10.1	10.1	10.1	11.2	12.3
Elasticity	1.35	1.01	1.01	1.01	1.01	1.01	1.01	1.01	1.02	1.03
Avg. Days Spent	10.0	10.0	10.0	10.5	10.5	11.0	11.0	11.5	12.5	13.5
Avg. $ spent p/day	140	141	143	144	146	147	149	150	166	192
Gross contr. To GDP (%)	4.3	3.9	4.8	4.7	4.7	4.8	4.9	5.0	5.2	5.7
Foreign Exch. Leakage										
Coefficient	0.20	0.20	0.19	0.18	0.18	0.18	0.18	0.18	0.15	0.13
Leakage (USD'mil)	281.3	309.7	323.9	337.8	372.0	409.5	450.9	496.4	703.4	1088.8
Net Foreign Exch. (US $'mil)	1,125.0	1,238.7	1,380.8	1,539.1	1,694.5	1,865.6	2,054.1	2,261.5	3,986.0	7,286.7

Net contr. to GDP (%)	3.4	3.1	3.9	3.8	3.9	4.0	4.0	4.1	4.4	5.0
Fiscal Contribution										
(Direct + Indirect Taxes + Fees										
US $ mil	126	148.2	174.3	204.9	241	283.4	333.3	391.9	885.3	2,008.3
As a % of GDP	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.7	0.9	1.3
Employment Generation										
Direct (‘000)	66	74	82	91	101	112	125	139	236	403
Indirect (‘000)	165	185	205	228	253	280	313	348	590	1,008
Total (‘000)	231	259	287	319	354	392	438	487	826	1411
Income Generation										
Direct ($’mil)	57	68	75	84	93	103	115	128	217	371
Indirect ($’mil)	137	163	180	202	223	247	276	307	521	890
Total ($’mil)	194	231	255	286	316	350	391	435	738	1261

Source: WDI, GSS, GTA, GIS, GRA and Consultant’s calculation

c. Analysis of projected economic impact indicators

For ease of analysis, the 2013-2027 Plan period is divided into three phases or medium-term plans as follows:

Phase 1: The First Medium-Term Plan: 2013 - 2017
Phase 2: The Second Medium-Term Plan: 2018 – 2022 and
Phase 3: The Third Medium-Term Plan: 2023 – 2027

Monetary values are quoted in US Dollars (USD).

i. Gross Domestic Product (GDP)

As indicated above, a conservative approach has been adopted to avoid overly optimistic expectations, which might result in spurious policy formulation. In other words, the projections are the minimum expected values.

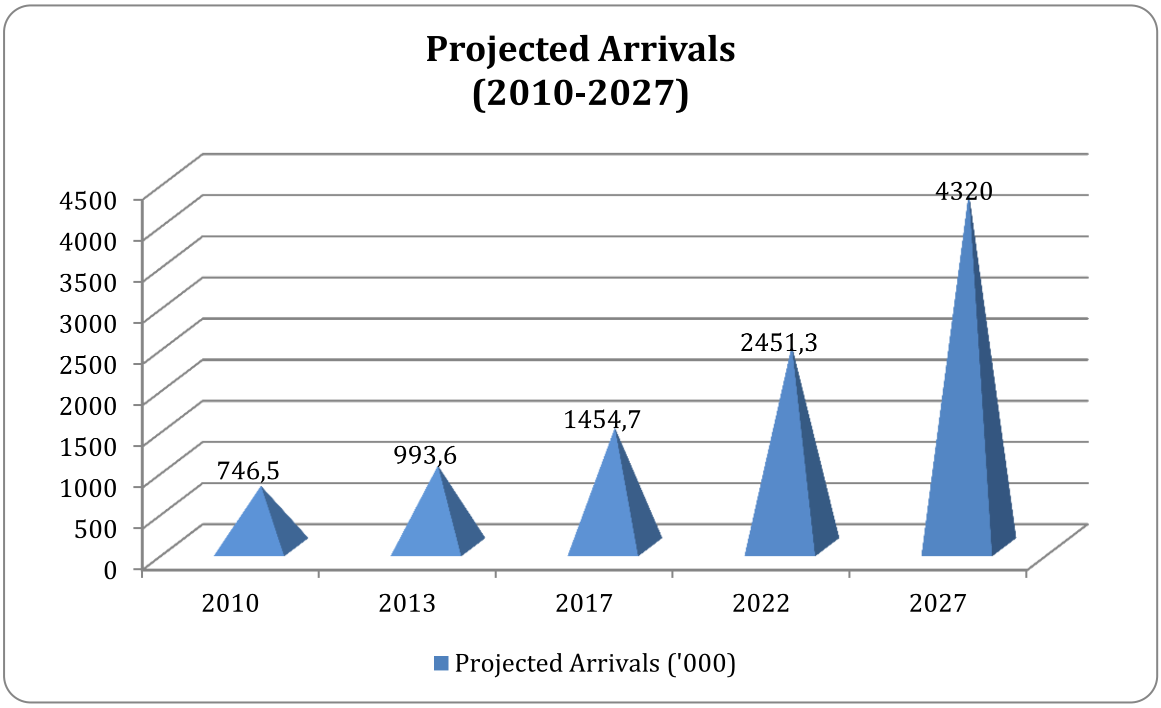
At an average of 8 per cent per annum in Phase 1, GDP will rise from USD 40.3 billion in 2013 to USD 54,8 billion by 2027, a 36 per cent increase. At the terminal years of Phase 2 (2022) and Phase 3 (2027), GDP is estimated to reach approximately USD 90 billion and USD 147 billion respectively. By 2027, therefore, GDP will quadruple the projected value for 2013. In the context of Sub-Saharan African economies the outcomes constitute a phenomenal development.

ii. Arrivals and receipts

For Phase 1, the **projected arrivals** figure in 2013 is 994,000. This figure rises throughout the period and reaches 1.5 million in 2017; the latter is equivalent to 1.5 times the 2013 value. The terminal years of Phases 2 and 3 the values will reach 2.5 and 4.3 million arrivals respectively, i.e. 2.5 and 4 times the initial year value respectively. The realisation of the latter will provide an indication that the Plan is on track by the *incrementalism criterion.*

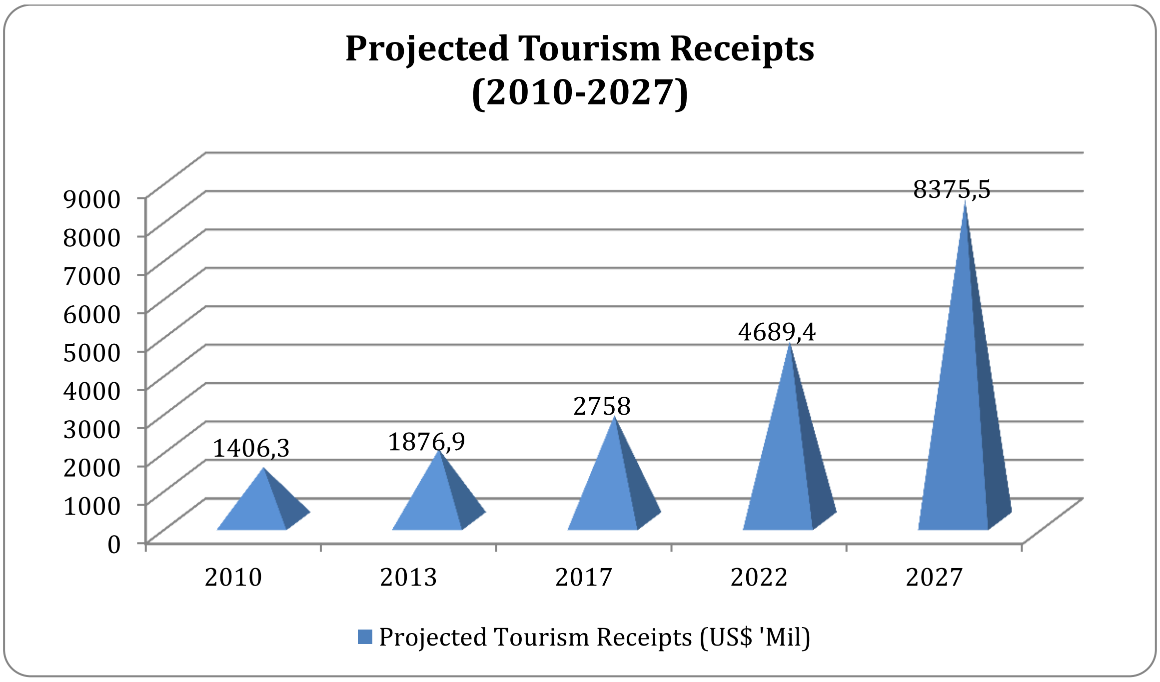
The **corresponding receipt** accruals are projected to be USD 1.9bil for 2013, USD 2.8 for 2017 and will rise to USD 4.7bil by 2022 and to USD 8.4bil by 2027. The realisation of these projected outcomes will constitute significant contributions in the economic development process as will be seen below in the context of foreign exchange contribution, employment creation and income generation. The projected arrivals and receipts are depicted pictorially below:

Figure 23: Projected tourist arrivals (2010-2027)



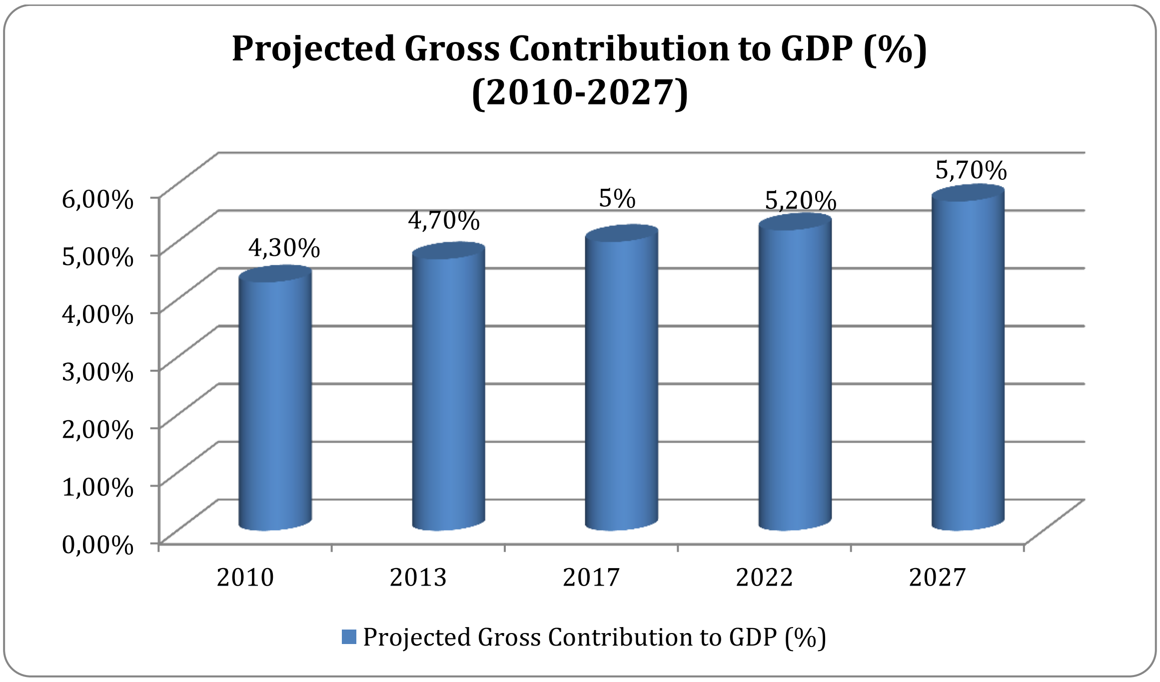
Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

Figure 24: Projected tourism receipts (2010-2027)



Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

Figure 25:Projected gross contribution to GDP (%) (2010-2027)

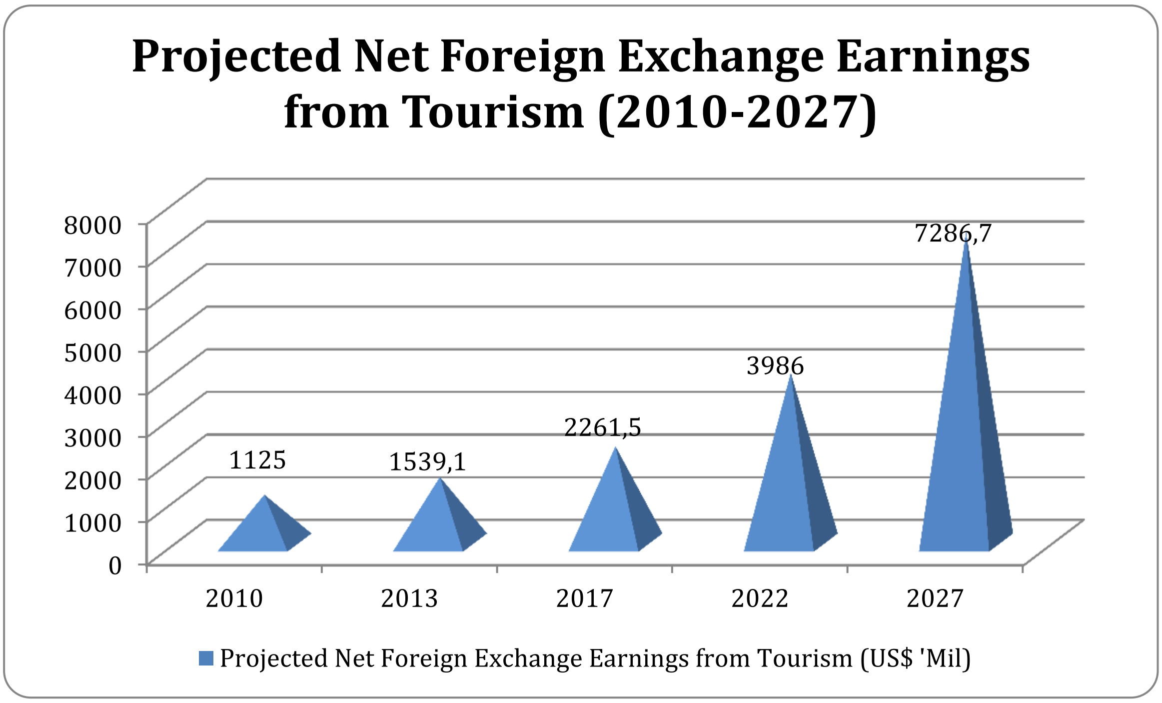


Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

iii. Foreign exchange contribution trends

Potential foreign exchange contributions from the above projected accruals can be seen in two ways – at the gross level and/or the net of the gross after factoring out the foreign exchange leakage. Here the necessity for the latter procedure arises from foreign exchange-based transactions, which occur in the industry such as imports of goods and services, expatriation of profits abroad, etc. Their economic impacts are external to the domestic economy. Consequently, the net foreign exchange is more relevant in assessing the real impact on the economy. The net foreign exchange contribution projected is estimated at 3.8 per cent of GDP during the initial year (2013) of Phase 1 and will rise to 4.1 per cent in the terminal year (2017). The values will reach 4.4 per cent and 5 per cent in 2022 and 2027 respectively. The projected outcomes are justifiably lower than those for the 1996 Plan because of the on-going partial structural change in the Ghanaian economy into an oil and gas economy. However, they constitute a significant portion of the GDP during the entire plan period. The projected values are shown in Figure 26.

Figure 26: Projected net foreign exchange earnings from tourism (2010-2027)



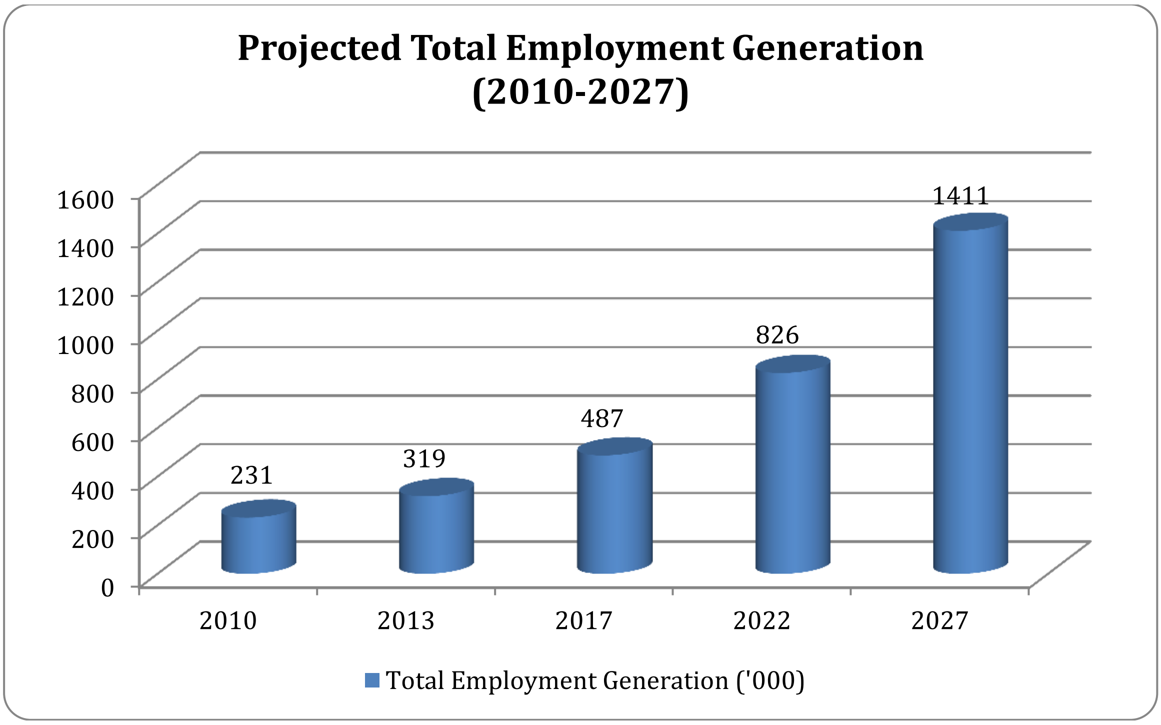
Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

iv. Employment Creation and Income Generation

The labour-intensive nature of the tourism industry is captured by the rapid growth in the total employment to be created. Total employment here is defined as direct plus indirect and induced employment. From a total employment of 231,000 created in 2010, the number is projected to rise to 319,000 in the initial year of Phase1 and will steadily continue to rise until it reaches 487 thousand in 2017. The numbers will further rise to 826,000 by 2022 and 1.4mil by the terminal year (2027) of Phase 3. The totals were derived from the direct employment through the multiplier process. For example, the direct employment projected for the initial year is 91 thousand and multiplying by the employment multiplier of 3.4 yields 319,000.

The **income generation** also shows a steady rise in the trend. Total income, consisting of direct plus indirect income, is projected to rise from the 2010 figure of USD 194 million to USD 286 million in 2013, and to reach USD 438 million in 2017. For the next two Phases (2 and 3), the economy is projected to attain quite phenomenal employment income levels - USD 738 million and USD 1.3 billion in 2022 and 2027 respectively. Here again the multiplier process was used to generate the total income from the direct income (Income Multiplier = 3.4). Figure 26 below depicts the projected employment generation (2010-2027).

Figure 27: Projected total employment generation (2010-2027)

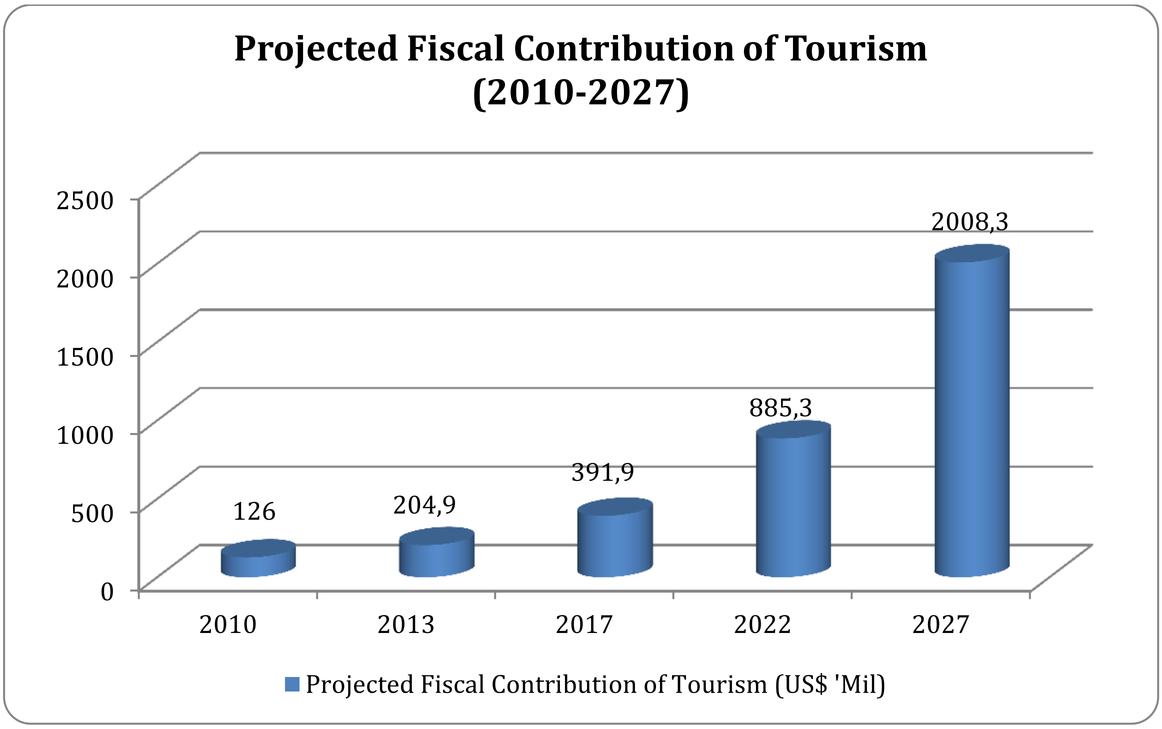


Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

v. Fiscal contributions of tourism

Tourism's fiscal role in the form of tax revenue generation has been quite significant over the years. Although it is difficult to capture all the details, using the historical trends, partly captured by the 1996-2010 Plan, and under various plausible macroeconomic assumptions, projections have been made to reflect the future trends of the economy. From total revenue of about USD 126 million generated by the industry in 2010, the figure is projected to increase to about USD 205 million in 2013 and reach almost USD 392 million in 2017. Under the assumption that the expected transformation of the economy and the adherence to recommendations towards the development of the tourism industry will occur, the fiscal contributions will reach USD 885 million and slightly above USD 2 billion in 2022 and 2027 respectively.

Figure 28: Projected fiscal contribution of tourism (2010-2027)



Source: UNDP, UNECA, UNWTO, MOT, GTA, GIS and Consultant's calculations

5.7.5 Recommendations for enhancement of economic benefits

As was done in the 1996-2010 Plan, the projections in Table 32 have been done with some degree of conservatism but with flexibility in an attempt to minimise the errors of projection stemming from the limited data available. The fundamental consideration is that the success of the Plan will depend on collective action and mutual trust between Government and the private sector. Outline of the standard recommendations are contained in the previous Plan. They remain valid and realistic for implementation of the current Plan. The key to enhancing the benefits of tourism is the ability to encourage tourist to view Ghana positively in order for them to increase their patronage of the sector, stay longer and spend more on tourism products.

a. Increasing tourist stay and spending

As pointed in the 1996-2010 Plan, several approaches must be adopted to encourage greater tourist expenditures. The average day spent in 2010 was 10 days at an average expenditure per day at USD 140. By 2013, the average day spend is expected to rise to 10.5 with a corresponding expected average spent rising to USD 144 per day. However, increasing tourist expenditures is only achievable if the quality and supply of tourist goods and services are commensurate with the expenditures. The recommended approaches include the following:

- Provide more and a greater variety of tourist attractions and activities, including interesting tour programmes, to encourage tourists to stay longer in the country and, at the same time, pay for the attractions and activities.

- Provide more shopping opportunities for tourists, especially a wide variety of good quality crafts and fashion clothing using locally produces textiles and designs. This approach implies not only increased production and imaginative design but also convenient sales outlets that apply good merchandising techniques.

- Emphasise good quality and 'good value for money' tourist facilities and services so that higher-spending tourist will be attracted to Ghana and, when here, will be willing to spend their money.

- Apply target-marketing techniques aimed at attracting higher-spending tourists who also will appreciate the types of attractions and activities available in Ghana.

- By providing enhanced tourist attractions, facilities and services, along with marketing techniques, encourage tourists who have already been to Ghana to return for more visits.

- Encourage overseas Ghanaians who are visiting friends and relatives in Ghana to devote some of their vacation time travelling in the country, staying in commercial accommodation, visiting attractions and using restaurants and other tourist facilities and services.

Although the degree of compliance with respect to the above approaches cannot be fully assessed at the moment, it is hoped that the implementation of the new plan will fully recognise their potential impact on the sector.

b. Strengthening linkages: supply and value chains

Closely related to the analysis on poverty reduction above is the essence of strengthening tourism sectoral linkages.

Role of Linkages in Economic Development: Sectoral linkages are essential in identifying appropriate growth poles in the development process. The extent of tourism's contribution to the growth process depends on the linkage between the sector's activities and the activities of other sectors. There are two types of linkages that are normally applied in linkage analysis – backward and forward linkages. Linkages can be categorised as:

- ***Backward Linkages*** operate between Sector B and C if B purchases C's outputs to produce B's output.
- ***Forward Linkages***. If B's output in turn becomes the input for Sector A, then B has a forward linkage with A.

Basically, the tourism product is a final product and in this respect can only generate few or no forward linkages. Normally, it is more advantageous to the economic growth process in a country if an activity possesses both types of linkages because the benefits spread on a larger scale.

A casual follow-up (interview) on a linkage table developed for the 1996-2010 Plan indicate that, except for the hotels and the restaurants whose coefficient changed slightly, virtually all others remained static during the plan period. 33 below, shows that, the hotel and restaurant coefficients changed by only 3 points. The figures indicate that tourist shops have the highest backward linkage (0.88), followed by restaurants (0.83) and the hotels (0.64). Travel agents have the least linkage with other sectors of the economy (0.27).

Table 33: Sectoral linkages of the tourism sector (2011)

Sector from which input purchased		Input Purchased by:						
		Hotels	Guest Houses	Restau-rant	Tour Oper.	Car Rental	Tourist Shops	Travel agents
1	Agriculture, Fishing, Livestock, Beverages	.23	.13	.50	--	--	--	--
2	Manufacturing	.07	.09	.15	--	--	.75	--
3	Public Utilities	.12	.05	.03	.03	.03	.01	.03
4	Construction	.05	.04	.03	.02	.02	.02	.02
5	Wholesale and Retail Trade	.04	.01	.01	.01	.01	.03	.01
6	Transp. Storage & Communication	.02	.02	.01	.32	.40	--	.10
7	Finance Insurance, Real Estate & Business Services	.02	.01	.01	.01	.01	.01	.01
8	Community, Social & Personal Services	.01	.01	.01	.01	--	.01	--
9	Government Services (Taxes)	.08	.08	.08	.06	.06	.05	.10
10	**Total Backward Linkage**	**.64**	**.44**	**.83**	**.46**	**.53**	**.88**	**.27**
11	**Value Added**	**.36**	**.56**	**.17**	**.54**	**.47**	**.12**	**.73**
12	**Total**	**1.00**	**1.00**	**1.00**	**1.00**	**1.00**	**1.00**	**1.00**

Source: Consultant's estimates from the tourism enterprise survey and official data sources

In analysing the importance of linkages in tourism, it is important to factor in the essence of supply and value chains. **Tourism's supply chain** essentially seeks to connect all activities of players who can be categorised as suppliers, makers, distributors and retailers of the tourist activities. The identification and development of the key players in the supply chain leads to a sustainable inter-sectoral growth and development. Employment creation and income generation at the tourism destinations will lead to poverty reduction in the areas. The supply chain, as partially indicated in Table 33 above, will entail, among others, activities in accommodation, transport and excursions, bars and restaurants, handicraft, food production, entertainment, local governance and the infrastructural requirements of the destination areas.

If we use the tour operator as an example, he/she enters into contractual relationships with tourism suppliers such as airlines, hotel operators and suppliers of associated services such as airport transfers. These suppliers, in turn, contract suppliers who service their business needs: in-flight caterers, airline leasing companies, airport terminal services (i.e. check-in-services, baggage handling, flight controllers, customer services agents for visitors and those with special needs, such as the disabled)

At the destination, ground services are also contracted. An example is the employment of tour representatives to meet guests at the airport, welcome them into their accommodation and utilise the opportunities for retail sales of additional services such as tours and events.

Another aspect of the tourism chain is that the analyst must take into account the **value chains** in the industry. Essentially, "the value chain describes the full range of activities required to bring a product or a service from conception, through the different phases of production, delivery to final consumers and final disposal after use" (Kaplinsky and Morris, 2004).

The **four main tourism sub-chains** that policy and economic analysts of Ghana's tourism industry must consider are: i) Accommodation (hotels, resorts); ii) Food (restaurants, intermediaries, farmers); Excursions (tour operators, transport, communities); and iv) Handicraft (producers and vendors).

The value chain approach to tourism development analysis helps the analyst and the policy maker in identifying optimum situations and conditions in which to intervene in order to maximise the benefits of the tourism industry.

Table 34 below contains some tourism-related imports that can be produced locally to reduce the foreign exchange leakage, create employment, generate incomes and, to some extent, reduce poverty in producing areas. A case in point is the high import bills of rice and chicken, which stood at Gh¢ 376.6 million and Gh¢ 265.1 million respectively in 2011. Raising the quality (value) of these items will, therefore, encourage patronage by the hotels and restaurants and, thus, reduce the import bill and positively impact on the economy. Also of significance is the need to enhance the fishing industry to meet hotel demand specifications so as to curtail the huge import bill as depicted by the 2011 figure - Gh¢ 166.6 million.

Table 34: Some tourism-related imported products (GH¢ '000)

Items	2007	2008	2009	2010	2011	Total
Rice (broken, semi/wholly milled)	139,968.8	229,095.5	290,884.4	268,574.8	376,626.4	**1,305,145.0**
Frozen fowl (chicken)	55,516.2	85,920.5	97,849.6	148,048.6	265,068.9	**652,403.8**
Tomato paste	45,593.0	41,596.1	52,949.4	65,784.1	119,132.9	**325,055.5**
Fish (frozen, prepared or preserved)	16,693.4	25,938.1	50,071.4	81,259.6	166,613.6	**340,576.0**
Frozen bovine meat	10,204.2	15,488.9	7,294.8	10,522.4	12,375.0	**55,885.3**
Vegetables preserved other than by vinegar, etc, not frozen	193.4	128.6	58.5	107.6	43.3	**531.3**

Source: Ministry of Trade

5.7.6 The SWOT and facilitation of investment in tourism

In analysing the facilitation of investment in tourism, it is necessary to a) identify the general strengths, weaknesses, opportunities and threats (SWOT) prevailing in the economy; (b) stipulate the current facilitation/regulatory framework on tourism; and (c) appropriately cast the recommendations in the above perspectives.

a. The SWOT

The SWOT analysis on the general strengths, weaknesses, opportunities and threats was presented in sections 2.12 and in greater detail in Appendix 2.12

b. Current facilitation/regulatory framework

Over the years, government has made concerted effort to provide several legally enabling provisions/conditions to promote investment in the economy as would be observed below.

The Investment Act (GIPC ACT478) allows 100 per cent foreign ownership of local companies and joint-venture operations. The minimum required equity for foreign investment in a joint-venture is USD 10,000. The amount for enterprises wholly-owned by non-Ghanaians is USD 50,000.

With regards to investment promotion in the sector, a Legislative Instrument for promotion of Tourism, L.I 1817 was promulgated in 2006. The L.I identified the various activities with incentives for promotion;

- **Accommodation Establishments (hotels, motels, resorts, guest houses, serviced flats and apartments, holiday apartments and others as licensed by the GTA):** exemption from payment of Customs import duties, VAT and other related charges on machinery, equipment, appliance, furniture and fittings in pre-approved quantities. Also, Tax holidays of 4-10 years depending on the star rating and location of facility.

- **Catering Establishments (fast food, restaurants and others as licensed by GTA):** exemption from payment of Customs import duties, VAT and other related charges on machinery, equipment, appliance, furniture and fittings in pre-approved quantities. Tax holidays of 3-5years depending on the location of facility.

- **Travel and Tour Establishments (Coaches/Buses and Car hire services):** exemption from payment of Customs import duties, VAT and other related charges on machinery, equipment, appliance, furniture and fittings in pre-approved quantities. Tax holidays of 3-5 years depending on the location of facility.

- **Conference and Convention Establishments (management and operation of international conference centres);** exemption from payment of Customs import duties, VAT and other related charges on machinery, equipment, appliance, furniture and fittings in pre-approved quantities. Tax holidays of 3-5years depending on the location of facility.

- **Recreational and Entertainment Establishments (night clubs, amusement centres, themes park, casinos, hand gliding and paragliding, surfing, yachting and boating, cruising, angling and other water recreational facilities);** exemption from payment of Customs import duties, VAT and other related charges on machinery, equipment, appliance, furniture and fittings in pre-approved quantities. Tax holidays of 3-5 years depending on the location of facility.

Work and Residence Permits for foreign shareholders and employees are tied to the paid-up capital.

c. Facilitation of the investment process

Providing an enabling environment for investors requires policy prudence on the part of government to ensure that the net outcome of the policy yields the desired results for development. In other words, there must be a cost-benefit analysis of the trade-offs from the policy. It must be stated that, at times, it is a politico-economic process that can sometimes assume complex dimensions to the detriment of economic advancement.

In general, tourism investment promotion in Ghana can be done through;

- stimulating private investment through government interventions; and
- governments' investment in infrastructure that make other tourism investments more commercially attractive.

These may include;

- informing prospective investors about development regulations;
- raising awareness of tourism investment opportunities in Ghana;
- guiding investors through approval processes and other relevant issues as required;
- identifying possible financial assistance where needed; and
- promoting a destination for tourism investment.

i. Informing prospective investors about development regulations

This involves assisting investors in understanding and meeting requirements regarding relevant planning and statutory regulations at all levels of government- local and national. The Environmental Protection Agency Act 490, the Accommodation and Catering Enterprise Regulations 1979 and the Tour Operators Registration & Licensing Regulations 1983 all establish industry standards and requirements that must be adhered to in operating a tourism business. Investors must be made to fully understand all these laws for their own benefits.

ii. Raising awareness about tourism investment opportunities.

The GTA needs to link up prospective investors with potential investment opportunities by creating awareness through identifying and advertising potential investment opportunities at local, regional, national and international levels, as well as all the benefits, governments' investor-friendly policies and incentives that come with it. All market information regarding expected demand, site-specific information and the conditions of existing infrastructure are relevant for boosting tourism investment.

iii. Investor guidance

Investor sensitisation and interest in the tourism sector begin from flexible visa acquisitions and travelling regulations right down to planning, registrations and work permits approvals. Efforts must be made to reduce time and cost involve in all these processes. The Ghana Tourism Authorities must collaborate with relevant agencies to prevent lengthy bureaucratic processes involved in business registration and must collaborate with visa issuance authorities to avoid stringent processes involved in visa acquisitions since these practices diminish investor interest.

iv. Identifying possible financial assistance where needed

Banking and Financial Information should be made available for tourists who may seek financial assistance. Banking and Non-Banking Institutions should enter joint ventures with the Tourism Authorities in order to take care of tourists need financially.

v. Promoting a destination for tourism investment

Promoting a destination for Tourism Investment rests upon the shoulders of the government through providing the enabling environment for doing sound business. This is achievable through upgrading the infrastructure (roads, drainage systems, hospitals, schools, entertainment centres, night clubs, casinos, games, bet centres, hotels, motels, bars and restaurants), public utilities (water, sewage and electricity) and providing stable energy supply. The political system is also very crucial in making Ghana a destination for Tourism Investment. Ensuring an accountable and efficient government devoid of excessive rent-seeking behaviours and corruption will facilitate tourism investment in Ghana.

5.7.7 Tourism and Local Economic Development (LED)

The stylised facts about tourism were established in the analyses above. In sum, a well-planned and managed tourism sector could become a major source of economic growth and development for the nation. An important developmental issue, however, is how to factor into the growth process the marginalised and the poor as active participants and beneficiaries of the positive outcomes of tourism development. Consequently, it becomes imperative to include local economic development (LED) as an integral part of the tourism planning and implementation processes.

The LED approach will require proper cost-benefit analyses to ascertain the trade-offs in the application of the local human capital, financial and natural resources and above all a common societal goal for the development of the area. The literature is replete with the rationalisation that the sector does not require a heavy financial capital outlay or infrastructure and, therefore, entry for actors should be relatively easy enough for poor areas in search of quick results for poverty alleviation. Secondly, it is, at times, argued that a *win-win situation* can emerge in which an area benefits from the positive outcomes of tourism development without experiencing negative impacts on cultural values and environmental degradation.

Modus Operandi of LED

The socio-economic and political structures of Ghana are such that the **fundamental prerequisite** for a successful tourism-led LED is the need for consensus building and effective rapport among three key players:

a) the local authorities and opinion leaders
b) venture capital and
c) central government.

The role of the **local authorities** – Chiefs, District Assemblies, Members of Parliament (MPs) and opinion leaders are crucial in the development process. There must exist a general economic development mentality that transcends parochial interests, especially political rivalry and litigations over land ownership rights. Equally critical to the process is local appreciation of the essence of education and its accompanying investments that can churn out the requisite manpower for tourism development, its complementary inputs and, indeed, to non-tourism related aspects of the local economy.

Tourism being mainly a private sector activity requires Ghanaian **venture capitalists** with appropriate credentials and right attitudinal approaches to the development of tourism in the local economy. Succinctly, venture capital is construed here as the businessman who possesses the requisite dreams about opportunities in local tourism, credit-worthy and can be supported by local authorities and the government. The foregoing concept transcends the contemporary notion of quick profit maximisation in the economic spheres of trade and commerce. Venture capitalists are among the scarcest resource requirements for national development as a whole.

The inclusion of **central government as a facilitator** is a *sine qua non* in a mixed economy where market forces neither lead to the establishment of equilibrium state nor to equitable distribution of incomes. In the latter case they often widen the disparities rather than close them. Under such circumstances, government interventionism is crucial for providing the enabling environment for investment in the local areas; for example, the provision of access roads and social services such as water, energy etc. and the optimal application of local cultural assets to attract tourists.

Participatory Approach to LED

A participatory approach to LED in which everyone is made/encouraged to see himself or herself as a part owner of the development effort is essential. This could be undertaken through basic social equity participation in terms of communal labour participation in the provision of social capital such as the construction of access roads to and sanitation at destination sites. It could also take the form of a token monetary contribution that binds the contributors to the project. Aside from the economic benefits to be derived, there is a built-in policing element, which makes everybody the watchman over the maintenance of the project and security for the project area.

Proximity of Sites and External Economies

It is necessary to encourage two adjacent sites to collaborate in their tourism activities in order to jointly derive large-scale benefits from tourism ventures. By implication, this approach also ensures cost minimisation when the need arises for cost outlays to enhance quality of the tourist product in both communities. A case in point is the proximity of Cape Coast and Elmina, two key destinations in the country. For example, renovation of the two castles should be done under a single contract and undertaken simultaneously within a specified timeframe in order to minimise cost.

Proviso

The **proviso** for the above-stated conditions to hold is the need to recognize the seasonal nature and, at times, unpredictability of activities in the tourism sector and, therefore, the need for other supplementary activities to minimize the impact of any downturn in the local tourism economy**.**

In conclusion, and for purposes of resource economisation and product enhancement, the LED approach to tourism planning should be highly recommended.

5.7.8 Gender, tourism and economic growth nexus

Gender-based issues have received keen attention from key international bodies such as the United Nations agencies and various bilateral bodies worldwide. This is because the woman and the girl-child have been viewed as under-privileged in most societies and, therefore, deserved policy actions, which would reverse the trend and, thus, enable their effective participation in the growth and development process of the economy. The UNWTO, in a very insightful report, Global Report on Women in Tourism 2010 (see also Sections 2.11.6 and 5.10.6), in more specific terms identified some of the key factors underpinning the above-mentioned under-privileged status of women. They deserve policy attention in Ghana's move towards sustainable macro-economic growth and development in general and the tourism sector in particular.

The survey amply suggests that investment in tourism is socio-economically more cost effective in empowering women to become active agents in the workforce, entrepreneurial activity and in leadership roles than in other sectors of the economy. The report finds women in tourism as generally "*underpaid, under-utilised, under-educated, and under-represented".* However, it conclusively finds that tourism provides an avenue for reversing the situation. The report also provides the following *stylised facts* about women in tourism which equip the policymaker with further insights for growth-promoting policy interventions.

1. Women make up a large proportion of the formal tourism workforce
2. Women are well represented in service and clerical level jobs but poorly represented at professional levels
3. Women in tourism are typically earning 10% to 15% less than their male counterparts
4. The tourism sector has almost twice as many women employers as other sectors
5. One in five tourism ministers worldwide are women
6. Women make up much higher proportion of own-account workers in tourism than other sectors
7. A large amount of unpaid work is being carried out by women in family tourism businesses

The Ghanaian Scenario

As stated in the earlier analysis on LED, a realistic analytical approach to the gender issues in tourism in Ghana must go beyond the socio-economic to the politico-economic ramifications of policy making within a democratic dispensation. In this regard, trends in the country would indicate that issues concerning women's active participation in tourism, if pursued with relevant policy interventions and fiscal support, will yield dividends for women and, consequently, accelerate economic growth and development. In general, positive cases in gender advancement include, *inter alia*, the following key positions being held by women in relevant institutions in the country: the Speaker of Parliament, the Chief Justice, the Minister of Tourism, and 29 female Members of Parliament expected in the next Parliament. This is quite a formidable force to constitute a gender advocacy platform to improve the situation. In addition, there are now numerous gender-based NGOs and an ever-increasing research interest in academia and elsewhere to provide the requisite empirical back-ups.

In the light of the above ray of hope for gender balance in the socio-political landscape, what are then some of the policy options to be pursued to enhance women's empowerment in the tourism sector? Some suggestions are provided below. They include some of the standard recommendations of the UNWTO:

- **Main Streaming of Gender in the Policy and Planning Process**: Sensitisation of the top political establishment of the potentials of the tourism sector and the fact that the minimal influence of women in the sector constitutes a major missing link in the economic growth and development process. This is the juncture where the influential office holders mentioned above can play a vital role in articulating the case for a pro-gender policy stance of government

- **Research-based Policy Action:** An in-depth research must be conducted to ascertain the constraints/predicaments of women entrepreneurs with potential capabilities of entry into the industry. A proactive government intervention should not preclude the consideration of a ***quasi-affirmative action*** that provides enabling investible facilities for women. This will entail, *inter alia*, the establishment of loanable funds on easier terms than those administered by the traditional commercial banks. The scheme can also be supplemented by government guarantees for venture capitalists that want to expand their businesses beyond what the scheme can accommodate.

- Women already in the industry must be encouraged to participate in **education and training** programmes to upgrade their skills to match industry requirements.

- The **private sector** must be encouraged to promote gender equality as Corporate Social Responsibility (CSR). Part of the strategy could also be the establishment of a fine-tuned **national award scheme** by the Ministry of Tourism for firms, which are gender-sensitive in their managerial appointments. However, efforts must be made to avoid any semblance of interference in corporate governance, conflicts of interest and /or favouritism.

By and large, although there is significant female presence in the lower ranks of the tourism sector, the managerial ranks do not provide an acceptable picture and must, therefore, be vigorously addressed to conform to the on-going trends in the other sectors of the economy and the world at large. In this regard, adherence to suggestions provided above should go a long way to minimise the gender disparities and create an enabling environment for economic growth and development.

5.7.9 Conclusions

It has been established in the analyses why developmentally, tourism is accepted worldwide as an engine of growth and development for several developing countries with or without vast natural resources. Ghana, which abounds in attractive tourism destinations, rich culture and the hospitality of its people, belongs to this category of developing countries. The historical trends in the tourism sector in Ghana point to the fact that the concept of long-term planning for its development is a useful strategy. The process identifies the strengths, weaknesses, opportunities and threats (SWOT) in the national economy and the sectoral situation and seeks to provide optimal solutions that will accelerate the growth and development of the industry. The current economic impact analysis is the second attempt after the one in the first tourism plan, the 1996-2010 Plan. It, therefore, benefitted from some of the propositions and outcomes of the latter in developing, presumably, appropriate methodologies for undertaking the study. Among the inherent advantages are continuity and consistency. There have, however, been adjustments to reflect the on-going changes and challenges in the economy. Of special significance to the analysis in the study were the outcomes of the third phase of the first plan (2006-2010). The period entailed two political dispensations (the Kufuor-Mills administrations), which could be assumed to have collectively pursued and admixture of optimal policies for tourism development.

The analyses concentrated on international tourism because of the limited information and data on domestic tourism. However, a few observations have been made on the sub-sector, at least, to indicate that it should not be a marginalised activity and, as such, must receive the requisite attention that can eventually convert it into a viable supplementary activity to international tourism.

Measured in terms of **arrivals**, it has been shown that the industry has been growing steadily over the years. For the 2013-2017 Plan, it is projected to rise quite rapidly from the 2010 level of 746,500 to 993,600 in 2013; 1,45 million in 2017; 2.45 million in 2022; and 4.32 million in 2027.These are conservative projections, which will depend primarily on the policy stance of government. It is in this respect that the political will of the government to prioritise the sector will be deemed crucial.

The sector's overriding importance has been amply demonstrated by the following projected values of the key economic impact indicators and their implications for policies aimed at the growth and development of the sector.

The **gross contribution of foreign exchange contributions to GDP** generated by tourism will rise from the 2010 level of 4.3 per cent to 4.7 per cent in 2013 and will continue the gradual rise as follows: 5 per cent in 2017, 5.20 in 2022 and finally reach 5.7 per cent in the terminal year of the 2013-2017 Plan (2027). It can be inferred from the figures that the growth of the oil and gas industry would dampen the influence of the tourism sector on GDP during the plan period. An equally rewarding approach is the consideration of the net foreign exchange generated after the various foreign exchange leakages that go into importation of goods and services and the repatriation of profits are factored out. However, as the economy undergoes structural transformation, the extent of leakage is expected to decrease because of local availability of supplies.

Despite the expected influence of oil and gas on the economy, tourism offers relatively high levels of aggregate **employment and income** because of its labour-intensive characteristics. The latter aspect offers the economy the potential for absorbing the growing surplus labour in the system. The estimates show that, total employment figures (direct plus indirect) will rise from the 2010 level of 231,000 to 319,000 in 2013 and further rise to 487,000 in 2017, the initial and terminal years of the first Phase of the 2013-2017 Plan. The projected trends for the terminal years of the remaining two Phases provide some hope for the labour market and poverty reduction. The corresponding **income generation** trends partially reinforce the forgoing assessment, provided a vigorous policy and implementation effort would be made to develop domestic tourism. In terms of income generation, extrapolation made from the previous study and the limited information and data available give quite a bright future. Total projected income will rise from the 2010 level of USD 194 million to USD 286 million in 2013 and reach USD 439 million in 2017. It will continue to rise in subsequent years until it reaches USD 1.3 billion in the terminal year of phase 3 (2027).

The fiscal contribution from tourism has been rising over the years. The limited data and information from the Ghana Revenue Authority (GRA), tourism-related agencies (GIS, GTA) and destination as well as the research methodologies and results from the previous study have enabled extrapolation of tax revenue expected from the sector. The outcome shows that, the sector could generate as much as USD 204.9 million in 2013 and reach USD 391.9 million in 2017. By the terminal year of the 2013-2027 Plan, the figure will be above USD 2.0 billion A closer look at the sector seems to indicate that, there may exist some level of differentiated tax compliance. There is, therefore, the need for a thorough study of the compliance system in order to widen the tax net but also to close the loopholes in the system. It must be an optimal tax system that encourages compliance but neither intimidates nor stifles the growth of the industry.

Economic growth, sectoral linkage and poverty reduction has been analysed as a nexus. The **trickle-down** concept of economic growth has not proved effective in poverty reduction in Ghana when left to the potency of the market forces. The sectoral linkage aspect of the previous study and its subsequent re-visit, clearly show that, tourism has very limited linkage with other sectors. Coupled with a high foreign exchange leakage, effort must be made to raise the linkage by enhancing the supply and value chains. Of particular concern is the agricultural sector where there are high concentrations of the poor. In other words, a tourism policy that seeks the use of domestic agricultural produce will go a long way to reduce the incidence of poverty.

In a more rigorous economic sense, the tourism industry is currently operating under capacity. The preclusion of domestic tourism as potential source of employment creation, income generation and therefore poverty reduction magnifies the extent of the development problem. There seems to be just a token policy approach to develop the sub-sector as supplementary to international tourism. Currently, economic statisticians rank Ghana as a Lower-Middle income country. If the structural changes in the economy continue, then the time is ripe to inculcate in the youth the essence of travelling beyond their parochial locations and undertake excursions to tourism landmarks in the country to get socio-politically enlightened.

The critical constraints on the development of the sector have been analysed in the text. However, the two most critical ones are worth mentioning at this juncture. The sector critically lacks the **statistical base** for policy formulation and evaluation. Under such circumstances, even relevant research which may be policy rewarding are bound to be shelved to gather dust because the ultimate decision makers have no confidence and interest in the findings and recommendations. Secondly, the **marginalisation of the sector** in the overall policy framework should be of concern to any serious analysts and policy makers who delve into the potentialities of the sector in growing oil and gas economy. The oil curse, as captured by the proverbial *Dutch Disease* must engage the attention of government to consider tourism as a potentially viable outlet for ensuring the diversification of the economy.

Finally, it must be reiterated that, without proper recognition of the sector's potentials and adequate funding of the policy implementation agencies, (MOT and GTA), it will be difficult to achieve the Plan's goals.

5.8 Recommendations on improving the statistical system for tourism in Ghana

5.8.1 Recommendations for policy on tourism statistics

Section 4.11, Tourism Research and Management Information Systems, within the Draft National Tourism Policy of 2006, clearly identifies the requirement for accurate, reliable and comprehensive tourism statistics and correctly points out the general weaknesses exhibited by the existing system of tourism statistics and the constraints this places on an objective understanding of the condition and performance of the tourism sector.

The policy objective then correctly identified for tourism research and management systems is to address those inadequacies in order that understanding is improved and that this in turn better informs policy planning for tourism marketing and development.

The strategies for achieving this objective are correctly, if broadly and simply stated as the 'establishment of tourism research and management information systems for all themes and all levels (national, regional and local)' and to 'ensure thorough information is available on tourism attractions and facilities and adequate road signage to ensure maximum customer satisfaction'. However, despite the positive language and sentiments expressed here what is missing is a clear implementable direction offered to realise the strategies.

The principal recommendation that is missing from the policy for tourism statistics is a commitment to develop a TSA because it is exactly this kind of policy initiative whose integrative nature and successful implementation addresses the inadequacies, supports the policy objective and realises the strategies.

Committing to developing and establishing the Tourism Satellite Account: The TSA demands the existence of a robust system of tourism statistics as the basis for its evaluation and demonstration of the tourism sector's performance and contribution to the national economy and this can only be delivered by a collection of specialist surveys which are custom-designed, efficiently conducted, capably analysed and whose results are effectively published and disseminated. This represents a strengthening of the system of tourism statistics which can only be successfully achieved through the development of a collaborative culture between the GTA, Ghana Immigration Service (GIS), Ghana Statistical Service (GSS), Bank of Ghana (BOG) and the several other public agencies and private sector businesses that are both contributors of data and end users of the analysis and results.

5.8.2 Recommendations for statistics-related institutions

The weaknesses within the existing system of tourism statistics are to be found, in institutional terms, to lie principally with GTA and GIS but it should not be forgotten that the private sector, who are a major source of valuable data, also demonstrates weaknesses and the successful implementation of the master plan cannot be achieved without addressing issues associated with these non-institutional business organisations.

The purpose and value of collecting tourism statistics (indeed any statistics) is to enable a picture to be painted and an understanding to be reached of the activity and performance of the country or business being considered which then provides an information base to encourage and assist the planning and decision-making processes within these countries and businesses. The existing tourism statistics, collection and analysis situation in Ghana however does not readily meet the purpose and value criteria described and therefore are unable to meaningfully fulfil the role of informing future planning and decision making and it is this disconnection between purpose, value and informed use which is missing as much as the collection and analysis itself is inadequate.

Committing to developing and establishing the Tourism Satellite Account: Thus the principal recommendation in institutional terms is not so much what, for example, GTA and GIS need to do to improve their collection and analysis of data (the details of which follow in section 5.8 below) but how does this compilation of individual improvements recommended to various organisations become a coherent and focused approach which deals with identified weaknesses but also overcomes the disconnection between purpose, value and informed use. The answer to this question is the introduction, in policy terms, of the intention to pursue the adoption of the TSA, an initiative which is best developed and directed through the introduction of an institutional framework and focus for the integration of the many requirements and processes needed to strengthen the system of tourism statistics through to the delivery of an experimental TSA and beyond.

A decision to pursue the implementation of a TSA requires, in accordance with the approach recommended by UNWTO, the introduction of a collaborative institutional framework through which the lengthy and complex process can be managed and monitored, the so-called **Inter-Institutional Platform/Inter-Ministerial Committee.** This body was set up once before In Ghana, around 2004, but was abandoned in 2008 as funding to support its activities ceased. What is being recommended now is the re-establishment of that same body with a similar structure, similar objectives and similarly led by the technical expertise possessed by GSS.

Essentially, the need is to create a purposeful cooperative and collaborative environment, which brings together the various bodies that produce tourism statistics and basic tourism information such as GTA, GIS, GSS, BOG and associations of national tourism businesses plus other potential users of tourism information (universities, research bodies, other sectors of the tourism industry etc.). This forum then becomes responsible, through the use of technical sub-committees, for identifying the shortcomings of the existing system of tourism statistics, then for proposing, designing and implementing technical solutions and thereby moving the demanding and complex process forward.

The existing system of tourism statistics has suffered from significant weaknesses for many years and this situation appears to have been brought about through a combination of institutional and financial shortcomings that have led to operational compromises, capacity constraints and the abandonment of a previous programme of statistics improvement.

It is equally clear that the existing system of tourism statistics lacks the authority to transparently represent the key performance indicators of the tourism sector and unless the political commitment and financial resources to address this inadequacy are made available, the fundamental basis for understanding the economic and social contribution of tourism to the economy will be further compromised and also undermine the effective planning and development of the sector.

The creation of the GTA with its newly acquired revenue earning and self-financing authority may be considered as part of the solution to the problem outlined above but the lack of clarity that exists over the Tourism Levy collection mechanism at a regional and district level, where the GTA already suffers capacity weaknesses, and the uncertainty that exists over the budgetary priorities for the funds once collected, does suggest that caution is required when interpreting the opportunity that this new power represents.

There is no evidence of any thought having been given to how the Tourism Levy questionnaire might integrate with other data collection instruments already in use by GTA, particularly the Hotel Occupancy Rate Survey, for example, where the later could become unnecessary in light of the former or whether there is any overlap with the data requested on another collection instrument, the accommodation registration card.

There appears to be an evident expression of support for the introduction of improvements to the system of tourism statistics from technical officials at the principal Ministries and agencies engaged in data collection and analysis and it is to be hoped that this sentiment is endorsed at a senior and political level within the same organisations.

The following recommendations for improving the system of tourism statistics in Ghana are now put forward with the first six actions needing to undertaken urgently, with Ministerial engagement, to deal with the most pressing issues and to essentially return basic data collection to a baseline position from where the development of the TSA can proceed. The subsequent actions could be conducted within the framework of a TSA development and capacity building programme spread over several years, which could attract donor funding and be supported with technical assistance directed and managed through UNWTO who have conducted similar initiatives in Southern Africa and elsewhere.

5.8.3 The re-introduction of the Inter-Institutional platform

The setting-up and operation of a system of tourism statistics cannot be undertaken in isolation by a national tourism administration but demands as a basic modus operandi that a cooperative approach be adopted with other governmental and private sector partners. The decision to pursue the introduction of the demanding statistical framework of the TSA requires an even greater and further reaching commitment to a collaborative approach on tourism statistics collection, analysis and dissemination which is unlikely to be delivered by reliance upon an earlier series of informal relationships and agreements and must be replaced by the introduction of the UNWTO recommended approach using the so-called Inter–Institutional Platform (IIP).

The IIP in essence provides the all-embracing and collaborative institutional framework within which the statistical demands of the TSA can be examined and compared against the existing system of tourism statistics, the shortcomings identified, and improvements discussed, designed and implemented.

In the period 2004 to 2008 just such an IIP was established in Ghana and then abandoned, so this recommendation is for the re-introduction of this same organisational framework. A lack of financial support has been identified as the reason behind the failure of the original IIP and while this may ultimately have been true, the degree to which sufficient political will and commitment was available to support the progress towards the TSA through a financial difficulty is clearly questionable and this may have been because the structure of the IIP did not fully conform to the UNWTO model.

For the IIP to work most effectively, the UNWTO model suggests that it should comprise of a higher level Steering Committee that provides the politically influential voice that complements the technical level committee(s), Tourism Statistics Task Force or Tourism Statistics and Tourism Satellite Account Committee (TSTSAC). The latter organisation examines the technical requirements and recommends the appropriate course of action and the former facilitates and enables the implementation of the recommendations particularly when operational or financial obstacles need to be overcome. The UNWTO model is not wholly prescriptive but is sensitive to local circumstances and arrangements, which allow an adaptive approach to an IIP. Possibly Ghana's earlier experience either lacked the political Steering Committee or the strength of political will to ensure the progress of the TSA.

The opportunity now presented to re-establish the IIP must recognise the need to set up the two-tier approach, which demands a wholly cooperative and collaborative multi-member technical committee along with an equally collaborative higher, level political committee. The technical committee can be re-established along the lines of the previous example, the TSTSAC, which included technical representatives from GTB (GTA), GSS, GIS, MOT, MOF and BOG but its membership should be extended to include the MOL and private sector representatives. The political level committee or Steering Committee should comprise of Ministerial level representatives of those same (governmental) organisations and be chaired by the Minister of Tourism. The TSTSAC should be led, as before, by GSS, who possess the strongest all-round technical capability, although chairmanship of individual meetings may be shared across the membership.

It is fortunate, that the senior member of the GSS, who was responsible for leading the original development of the TSA and the TSTSAC, is still a senior member of the GSS Service Sector Economy Team and is responsible for tourism statistics and he can lead the re-establishment of the IIP/TSTSAC with all the benefit of that earlier experience. Much work was done in that earlier period, particularly with the drafting of specialist questionnaires and this work can assist and inform the approach to introducing necessary new surveys.

5.8.4 GTA and GIS re-establishing cooperation over the collection of tourist arrivals data

The stand-off which appears to exist between GTA and GIS over the accuracy and reliability of GIS data must be overcome and their current replacement by GTA prepared estimates must cease if the true authority of these and other principal indicators of Ghana's tourism sector performance are to be transparently established.

Visitor arrivals data are the fundamental statistical building blocks for understanding many of the critical characteristics of Ghanaian tourism yet the data used by GTA to determine these features do not correspond to internationally accepted practice and the issues associated with this problem therefore need to be addressed as a priority.

The absence of communication between these two government organisations has extended over a number of years and appears to have resulted from a combination of technical, political and possibly financial factors but this situation cannot persist and must be urgently resolved. It may well require Ministerial level intercession to ensure the deadlock is broken and the right meetings environment is in place but it will be up to the technical staff in both departments to discuss the modalities of data collection, analysis and transfer.

This could be a matter for the TSTSAC to assist with but in view of the historic sensitivity of the issues perhaps only GSS's technical assistance would be necessary and in any event the re-establishment of dialogue should not have to wait for the TSTSAC to be formally reconvened.

5.8.5 Revision of the entry/exit card

This matter should in reality form part of the technical discussions between GTA and GIS and any redesign of the entry/exit card seen in the wider context of how data transfer and analysis proceeds under the newly established working relationship.

It appears that greater electronic data collection at the border posts and hence the subsequent onward electronic transfer of data may not be possible for some years which would mean that either entry cards are passed to GTA for tourism analysis purposes or that tourism data is extracted and analysed by GIS and then the analysis is transferred to GTA. If an earlier procedure is readopted and the entry card is redesigned with a 'tear-off' portion containing the tourism questions with the 'tear-off' portion transferred to GTA or if the card is reprinted with a carbonated second copy whereby both organisations keep a copy of the card each, this would present an opportunity to slightly redesign the card to include other questions.

A further category of 'Purpose of Visit' could be added to cover 'day-visitors' and a further question could be added to ask about the main type of accommodation used on the visit i.e. hotel, guesthouse, family/friends, B&B etc.

5.8.6 Improved data collection by immigration and border officials

This matter should also be covered as part of the technical discussions between GTA and GIS and in general would focus on the opportunity which the re-established relationship gives to the introduction of a training programme for Immigration and Border Officials in tourism awareness, tourism statistics and customer care. Sensitising Border Officials to the value of their role in collecting visitor data and tourism data in particular and its importance for the economy could help with the accuracy with which they record data and help them understand why new questions are being added to the entry card itself.

It is likely that GTA staff could run these training programmes and initial discussions on this point with GIS received a favourable response.

5.8.7 GTA to re-introduce the visitor expenditure survey at Katoka International Airport

The international visitor exit/expenditure survey has not been conducted for several years apparently because of the refusal by Ghana Airports Company Ltd (GACL) to provide the necessary security passes that would allow GTA staff to access the airside departure lounges where the survey interviews were conducted. It is unclear what prompted this change of permission whether it was initiated for operational or security reasons or whether there may have been disagreements between GTB (GTA) and GACL.

The international exit/expenditure survey is another fundamental data collection instrument, which must be re-introduced as a matter of urgency and although GTA has indicated that they hope to be able to do so before the end of this year the basis for this optimism is unclear. A full explanation of the circumstances surrounding the issuance and subsequent removal of access to the departure lounges is required in order to demonstrate transparently that the moves to reintroduce the survey are directly addressing the earlier problems and will ensure that the re-commencement of this critical survey is sustainable and takes place as soon as possible.

5.8.8 Review the operation of the Hotel Occupancy Rate Survey

The Hotel Occupancy Rate Survey is conducted by GTA and is a simple questionnaire designed to collect monthly room occupancy data from graded hotels around the country. The data is collected quarterly by the GTA regional offices and sent on to GTA in Accra for compilation. The Survey enjoys a high response rate from the few high quality hotels, mostly located in Greater Accra, and suffers from a poor response rate from the much larger number of lower quality hotels which are much more widely distributed across the country. The Survey is therefore neither truly representative of the occupancy picture across the nation nor representative of occupancy across all the grades of accommodation. It is however representative of high quality accommodation occupancy in Greater Accra.

The poor response rate is believed to be due to a lack of understanding among smaller hoteliers and capacity difficulties in the GTA regional offices to assist the hoteliers and follow-up the late submission of the forms.

Since the new Tourism Levy is due to be collected monthly, from all tourism enterprises, and is based on turnover, it should demonstrate the basis for calculating the amount of money due. This might well (or could well) provide the room occupancy data upon which the most important source of hotel revenue is drawn and thus it may be possible to extract (or build into the questionnaire design) the occupancy data from this same form and avoid the duplication of a second survey.

The greater rigour which is likely to be associated with the collection of the Tourism Levy and the national reach of this tax is therefore likely to result in a much higher response rate from across the country and from all grades of accommodation thus ensuring a much more accurate and representative survey. However, at this stage it is unknown whether the questionnaire might be used for both purposes and how indeed the Levy is to be verified and collected but this point should be investigated and if the Hotel Occupancy Survey can be incorporated into the new Tourism Levy questionnaire then this should be done.

Alternatively, the only answer to improving the response rate and accuracy of the Survey is for GTA to conduct a further series of regional training seminars to improve hotelier understanding and/or include it within the new monthly accommodation statistics survey proposed below.

5.8.9 Develop and introduce a new monthly accommodation statistics survey

The existing (mandatory) accommodation registration system managed by GTA experiences such a poor response rate that the flow of data via the regional offices to GTA in Accra is too small for analysis purposes and is therefore unused.

The problem here is similar to that experienced by the Hotel Occupancy Survey whereby the higher quality accommodation businesses exhibit the highest response rates and ensure the greatest accuracy with the forms, which they return. Greater Accra also shows the highest levels of returns from across the regional offices.

Problems exist with the capacity of the smaller businesses to implement and manage this mandatory registration data collection system but a problem with capacity also exists in the GTA regional offices in terms of their handling of the monitoring, collecting and quality control of the survey.

A review of the entire survey is required which would include the design of the form, the nature of the questions asked (certain basic questions are of course necessary) and the management of its delivery and return. It might be more efficient if the accommodation businesses completed simple monthly returns, which aggregate the many individual registrations rather than sending copies of all the individual registrations to GTA as happens now.

The introduction of a simpler monthly business registration summary could be used to collect, for example, data on visitor purpose of visit, business turnover and employment but its design should be considered in the context of other survey instruments being used in parallel such as the Tourism Levy and Hotel Occupancy Survey to ensure that there is no duplication and the number of forms required is kept to a minimum.

In view of the capacity problems experienced at the GTA regional offices and in view of the demands to be placed upon them by the introduction of the new Tourism Levy survey, serious consideration should be given to passing the responsibility for monitoring, collection and quality control of the Accommodation Survey to GSS who already have a 70 strong national network of offices staffed with technical personnel familiar with administering statistical surveys. Analysis of the survey results may also be handled by GSS in Accra where their capacity is stronger than in the statistics section of GTA who will be under pressure with the increasing demands made of their staff by the Tourism Levy, Hotel Occupancy Survey, International Arrivals Survey and reintroduced Visitor Expenditure Survey.

The introduction of a redesigned Accommodation Survey will require a sensitisation programme with the private sector and an appropriate training programme for GSS staff in Accra and the regions if they are to take responsibility for the survey.

The review, design, training programmes and implementation oversight could be packaged along with a number of the subsequent surveys and initiatives described below into a capacity building programme supported by technical assistance provided through UNWTO and funded by donor assistance.

5.8.10 Household tourism expenditure survey

GSS has plans in place to conduct its own sample survey of Ghanaian households to collect expenditure data on their domestic and outbound travel patterns. This survey would be designed to compensate for the omission of such questions in the 2012/2013 Ghana Living Standards Survey (GLSS 6) which is about to commence. It is expected to be a one-off survey as future GLSS surveys are anticipated to include these questions.

GSS, through its Service Sector Economy Team has designed the questionnaire and is structuring the implementation of the survey through its network of 70 regional offices. It is hoping that this survey could be introduced midway through 2013, if funding is available from GSS. If this is not forthcoming, it could be introduced into the possible donor supported wider capacity building programme described above.

5.8.11 Inbound and outbound tourism survey

The inbound and outbound tourism survey is one of the surveys required to be introduced as part of the strengthening of the system of tourism statistics and the development of the TSA.
This Ghana International Passenger Survey would be an annual survey covering residents, non-residents, Ghanaians and non-Ghanaians and be designed to obtain a profile of those travelling to locations outside Ghana and to estimate their expenditure on travel and tourism activities. This sample survey would be conducted on a face-to-face basis at the country's principal land, sea and air entry/exit points and would include same-day visitors.

This survey is likely to be structured, implemented, managed and analysed by GSS but guidance is sought from international technical advisors on the design, management and analysis of the survey and it could be part of the wider donor assisted programme being mooted.

5.8.12 Capacity building and training of GTA statistics staff

The Director of Research and Statistics at GTA is a long-standing senior employee of the organisation who was in post during the period when the TSTSAC was in place and planning for the introduction of the TSA was begun. He and senior representatives from GSS and BOG have attended numerous UNWTO seminars and programmes concerning tourism statistics and the introduction of the TSA and he is familiar with much of the UNWTO definitions, concepts and statistics methodology, however, his technical support staff are small in number, are not in senior positions and have had far more limited exposure to the UNWTO statistics and TSA framework. The hiatus which has existed in recent years with respect to the International Tourist Arrivals Survey and the International Visitor Expenditure Survey and the inadequacies demonstrated by both the Hotel Occupancy Survey and the Accommodation/Registration Survey raises questions over the experience and personnel career development that has been possible for the technical staff in the department and their capacity to cope with major changes in their workload. This situation is also undermined by the use of numerous temporary 'National Service' staff, valuable additions to staff resources for many purposes but not really in a position to contribute to core staffing.

The introduction of the new Tourism Levy is likely (although it is unclear at this time how this will be handled administratively) to become a statistical management task for the department and as the recommendations being put forward for improving the system of tourism statistics indicate, the return of major analysis of international tourism arrivals and tourism expenditure will also be needed and the further demands for timely reporting and publication of data will also be expected. This certainly suggests that a review of staff resources and capacities will be needed and although the question of additional staff numbers can only be answered by that process, it is certainly appropriate to identify that weakness in staff knowledge of tourism concepts, definitions and classifications for tourism statistics and in relation to the introduction of the TSA does exist as does the need to support their data handling, analysis and reporting techniques.

Thus the introduction of a wide-ranging training programme for GTA statistics staff is recommended and can be incorporated in the proposed donor funded programme.

5.8.13 Sensitisation of TSTSAC member organisations to tourism concepts and TSA

Most member organisations, public and private, full and part-time, of the IIP and TSTSAC will have limited knowledge and understanding of tourism definitions, classifications, concepts and approaches used in the compilation and use of the system of tourism statistics and in the tourism sector generally including with the formulation of the TSA. Thus the introduction of seminars and workshops dealing with these topics will benefit the staff members (and close associates) who are likely to represent their organisations on these committees and enhance their participation and contribution.

5.8.14 Compatibility of national accounts use of supply and use tables with the TSA

According to the World Bank Ghana Statistics Development Programme their understanding of the current status of the Supply and Use Tables in use by GSS/National Accounts is that they are not produced in accordance with internationally acceptable standards, in part because they were last re-based back in 2004. At this point it is not clear whether the World Bank programme will be assisting with bringing the Tables up to a more recent re-based year or whether other plans are in place to achieve this but it will be essential to understand the extent to which there is a compatibility of approach to the compilation of the existing Tables with the approaches and requirements of the UNWTO TSA and if not, whether this might change over the next few years.

The recommendations to the existing system of tourism statistics being put forward in this document will take a couple of years to implement and produce results before the timing will be right for an experimental TSA to be introduced, by which time the development of the Supply and Use Tables may have improved but progress on this issue needs to be investigated and then monitored as part of the technical assistance programme being proposed.

5.8.15 Assistance and training in TSA procedures

Specialist training for staff in GSS, GTA and BOG will be needed since no personnel will have the experience of this stage in the progress towards the preparation of an experimental TSA. It will be essential for the eventual provision of technical assistance to be given in the compilation and completion of the numerous tables, which make up the body of the TSA framework and this can be delivered as part of the programme of support being proposed.

5. 9 Recommendations on tourism human resource development

There is the recognition that the development of the human capital in both the public and private sector of tourism is an important element for the long-term development of tourism as was pointed out in the 1996-2010 Plan. Adequate human capital is required to support Ghana's strategic tourism development objectives, as it emphasises a strong relationship amongst investment in tourism, job creation and poverty reduction. The key aspects of human capital emphasised in tourism includes social skills, knowledge, employment skills to overcoming gender biases. The broad objective of developing tourism in Ghana would not be achieved if conscious efforts are not made to develop the human capital required in both the public and private sectors, and formal and informal sectors of the industry. The capacity of the public sector officials needs to be enhanced to vigorously formulate and implement policy, projects and programmes related to product development, marketing, quality assurance and research. The private sector also requires in-depth knowledge and skills to invest and manage the tourism resources, facilities and attractions. Achieving these goals would require clear human resource and development policies and strategies targeted at tourism stakeholders and institutions operating in the public and private sectors as outlined in the following sections

5.9.1 Develop policy on tourism human resource development

A clear policy framework for human resource development and management (HRDM) covering the entire human resource management and development cycle should be developed and implemented to address the needs of both the public and private sectors. The policy should focus of the following:

a. Develop policy on tourism human resource development for the public sector

The capacity of the human resource base of the public sector needs to be enhanced strategically for improvement in the performance of the sector. To achieve this, a strategic human resource development policy should be developed and implemented with clear focus on training to develop managerial skills. Implementation of such a policy will empower the workforce and introduction of professionalism in such institutions; namely, the Ministry of Tourism; Ghana Tourism Authority; Ghana Tourism Development Company Limited; Hotel Catering and Tourism Training Institute; Ghana Museums and Monuments Board, National Commission on Culture and Ghana Wildlife Service among others.

The human resource policy should incorporate the following:

- Standard procedures and guidelines for human resource management
- Manpower planning
- Recruitment and selection
- Orientation, training, development& career progression
- Performance management
- Performance based reward systems
- Redundancies and separations
- Establishment of National Hospitality and Tourism Schools in all the regions
- Registration of tourism enterprise managers

Policies covering the areas above, especially for the public sector, should be carefully crafted since the success level and achievement of the development objectives of tourism is dependent on the adequacy and quality of workforce in the public sector. The development and implementation of these policies will ensure that the workforce in the public sector are engaged on merit, trained through defined career progression and motivated enough to deliver their policy formulation and implementation role as facilitators and not be perceived as 'policemen' of the tourism industry.

5.9.2 Improve public awareness on careers opportunities in tourism

There is the need to increase the awareness level of tourism stakeholders in both the public and private sectors to the important role they play in enhancing the contribution of the tourism industry to national development. This policy intervention should aim at:

a. Developing and implementing targeted awareness creation

Awareness creation programmes should be developed and targeted at industry stakeholders. The target groups should include public sector, private sector and local communities

5.9.3 Training needs assessment on tourism human capital

A training needs assessment programme to evaluate the training needs of both tourism public sector institutions as well as the tourism private sector workforce must be carried out as a matter of priority.

a. Carry out a training needs assessment and evaluation of public sector tourism human capital

Whilst the public sector of the tourism industry appears to have improved, the needed quantity and quality of the workforce to deliver the mandate of the sector is still inadequate. The academic qualifications of especially top and middle management staff of the MOT and the GTA is not in doubt. However, the professional and technical skills required for the efficient delivery of their assigned tasks need to be developed.

Assessment and evaluation of all existing staff should be conducted to identify gaps between job descriptions and job specifications. This will help in the development of appropriate training and development programmes for existing staff. The programme should not be shy of staff reshuffling, transfers and repositioning. The exercise should cover future recruitment and selections processes of staff for the MOT and GTA, especially District Tourism Officers as required by the Tourism Act 817.

b. Training needs assessment and evaluation of private formal sector operators

To get the private sector of the tourism industry to function effectively, a needs assessment should be conducted for all the workforce of the trade associations of GHATOF. This will identify the urgent shortfalls in the competencies of their workforce and strategies developed to overcome them.

This will involve interviewing a sample of the workforce of the trade associations of GHATOF, e.g. hoteliers (different star rating), tour operators, travel agents, drinking bars, chop bars, street food vendors, shops, taxi drivers and local communities at attraction sites among others with a well developed research instrument that will aid analysis of the job specifications, job functions, whether training is carried out, staff turnover, jobs which are difficult to find qualified staff. Such an exercise will highlight the gaps in the programmes offered by training institutions and the requirements of the industry. Training programmes can then be developed to address these challenges in the short, medium to long terms, covering standardisation and certification of training programmes as addressed in section 5.9.6.

It is recommended that the training needs assessment and evaluation of private formal sector should be continuous and measures taken to overcome identified challenges.

5.9.4 Establish a tourism human resource research unit

The implications of the rapid increase in both the demand for and supply of tourism products and services has brought out the limited availability of quality workforce as a major inhibiting factor to the development of tourism. Research should be conducted to determine the output of various hospitality and tourism training institutions and match outputs with the needs of the industry. Presently, there is an imbalance between the demand for, and supply of, tourism manpower in the country and only a small proportion of employees especially in the accommodation, restaurants and travel agencies have received some levels of professional training. Research shows that 22 per cent of hotels employ staff with no formal training in hospitality and over 58 per cent of the hotels have difficulty in recruiting suitable personnel[60.]

There is the need to establish and equip a vibrant research unit in the Ministry of Tourism to collaborate closely with the Research Institutions and Universities to develop research instruments to collect and analyse all relevant industry data to facilitate informed decision-making. Human resource development in the tourism industry should be continuous and the research unit will progressively monitor and provide information for the development of the workforce. It is recommended that the research unit be set up in the first year of the project.

5.9.5 Human resource capacity building at MOT, HOTCATT, GTDC and GTA

The following broad approaches are recommended for the development of the capacity of various levels of human resource in the Ministry of Tourism and its Agencies

a. Organise an orientation/induction programme

An orientation or induction programme should be organised for existing and new staff of the Ministry and its agencies to enable them fully understand the Vision, Mission of the Ministry and attitudes required for the attainment of these mandates. Other areas to be covered by the programme should include:

- Vision, mission, objectives, structure and functions of the MOT and its Agencies
- Policies, guidelines and regulation

[60]Mensah-Ansah, J. (2011) *Small Tourism Accommodation Businesses in Ghana, a Barrier to Strategic Tourism Development?; Sheffield Hallam University, UK*

- Strategies for achieving policies
- Role of tourism stakeholders
- Tourism and hospitality education and training

It is recommended that a joint team of consultants and selected staff of MOT and GTA should be recruited to undertake this exercise in the first year of the project.

b. Develop management and technical programmes

Based on the training needs and capabilities and skills of staff identified in the HRDM gap identification exercise, strategic HRD training programmes should be developed. Such training programmes should be strategic in focus, targeted at building a competent management core workforce for the MOT and its agencies. The programmes should cover both existing staff and future staff members. It is important that the programme is carried out on continuous basis.

The programme should aim at providing knowledge on contemporary management concepts and their implication for the hospitality and tourism industry. The programme should have both short-term modular courses and tailored regular advanced level management courses. Such courses should be developed and tailor designed in collaboration with existing recognised tertiary training institutions in Ghana, such as the University of Ghana, University of Cape Coast and Ghana Institute of Management and Public Administration (GIMPA). Where need be, training programmes that are not accessible locally, can be sought outside the country. This programme should be developed in the first year of the project and made operational in the second year.

5.9.6 Human resource capacity building in the private sector

The outcome of the training needs assessment and evaluation of the member associations of GHATOF should inform the development of appropriate training programmes for the workforce of the private sector players of the tourism industry.

a. Develop training programmes for the private formal sector

The requirement to improve the human capital of the private sector through continuous training and skills provisions is evident from various research findings and reports. Such training programmes should be tied to licensing to draw attention to the importance of training and enforce participation in training and staff development. Training programmes should not only be designed for the workforce but also for the employers to raise their awareness and appreciation of the importance of their role in developing the workforce and to provide that with basic tools of managing a tourism facility. This can be achieved through policy.

In the interim certain training institutions should be selected and empowered to carry out private sector training such as GIMPA, University of Ghana and University of Cape Coast. In the long term, the development of the National Hospitality and Tourism Training Schools established potentially through private sector investment or public-private partnership, would improve availability and accessibility to industry specific training programmes for Ghanaians to work and deliver quality service in the formal and informal sectors of the tourism industry.

The selected training institutions should be those who offer programmes that have been appropriately accredited by the National Accreditation Board.

To aid the development of accredited training programmes, it is recommended that a project to develop a National Tourism Occupational Classification Standards (NTOCS) will ensure standard job descriptions for tourism jobs at national level and should be the basis of competency-based vocational training. The development of the NTOCS should commence in the first year of the project.

5.9.7 Improving the quality assurance system for tourism education and training programmes

It is recommended that a quality assurance system is developed for tourism education and training programmes

a. Develop standardised hospitality and tourism training programmes

To achieve this it would be necessary to:

- Harmonise current training programmes offered by the plethora of tourism training institutions
- Develop a Trainer-of-Trainers programme to provide competent trainers for the various sectors with the tourism industry.
- Standardise curriculum in line with international standards whilst ensuring that it meets local industry demands
- Establish and implement nationally approved curriculum for tourism training.

b. Nationally accredit hospitality and tourism training programmes

To achieve this it is important to liaise with existing national accreditation bodies for the accreditation of nationally approved curriculum for tourism training. Where need be, a new accreditation body should be established for hospitality and tourism training programmes. This recommendation should be implemented in the first year of the project.

5.9.8 Building human resource capacity in existing training institutions

a. Develop the capacity of Instructors in tourism training institutions by offering on-the-job training and off-site training to improve their teaching skills

The training needs of existing instructors at HOTCATT and all private tourism training institutions should be assessed and evaluated and training programmes developed to fill the identified gaps. The training should be done in phases to cover all existing and future staff of hospitality training institutions, especially those offering competency and skills programmes.

The Development of the capacity of Instructors in tourism training institutions should commence in the first year of the project.

5.9.9 Improving accessibility and affordability of tourism training institutions

The necessity and importance for the establishment of a National Hospitality and Tourism School that will provide for the training and development of the human resource needs of the tourism and hospitality industry in Ghana cannot be overemphasised. The following strategies are recommended.

a. Establish a national hospitality and tourism training school

There is a gap in demand for the supply of well trained and dedicated front and back line staff for the tourism and hospitality industry, but to date this demand has mostly been met by a plethora of training institutions whose outputs do not meet the needs of industry. There is a misalignment in the demand for quality human resource of the industry and the expectations of existing tourism and hospitality training institutions and industry practitioners on the skills requirements of the tourism industry. As a consequence, the industry has been experiencing poor quality service delivery which is detrimental to achieving the full economic and social potential of the tourism industry. Again, there are serious challenges for hotels at the mid- and upper-end of the market in recruiting qualified local staff with the right working attitude, resulting in the recruitment of expatriates to fill key positions in these facilities. This trend can be reversed with the establishment of a National Hospitality and Tourism School with application hotels. The School should offer relevant leading tourism and hospitality programmes at the competency/skill, supervisory and management levels. In the long term, campuses of the National Hospitality and Tourism School can be established in other regions with the objective of bringing quality, accessible and affordable hospitality and tourism training to the doorsteps of industry stakeholders. This will increase access to training and skills development and ensure adequate trained tourism workforce.

In order to improve availability and affordability to quality hospitality training schools, the private sector should be encourage through policy to develop training schools, especially outside the national capital. These schools should be modelled after the National Hospitality and tourism school and should adhere to standardisation and certification regulations.

i. Key Strategies for the Establishment of the National Hospitality and Tourism Training School:

The following are key strategies for the establishment of the National Tourism and Hospitality School**.**

- Establish a technical committee to oversee the establishment of the school and potential to set up more schools in the regions
- Legally establish the school with an Act of parliament
- Prepare new nationally accredited curricula to reflect the needs of the industry
- Affiliate the schools with national and international institutions and agencies for exchange programmes and benchmarking

ii. Funding

Funding for the establishment of the National Hospitality and Tourism School should be approached from a short to long-term perspectives.

In the short term funding can be sourced from but not limited to the following sources:

1. Tourism Fund established under Act 817 of 2011
2. Ghana Education Trust Fund (GETfund)
3. Government of Ghana (Budget Allocation)
4. Private sector

In the long term, funding can be sourced from but not limited to the following sources:

1. Bilateral and multilateral arrangements with major tourism countries in Africa, Europe and Asia in developing faculty/instructors, curriculum and physical infrastructure of the school. (Most tourism schools in Africa have been developed through this strategy)

2. Private sector

Ultimately, the operations of the school should be self-sustaining with the charging of nominal fees to supplement other sources. Fees for the competency/skills programmes should be at levels that will promote pro-poor agenda.

5.9.10 Linkage between academia and tourism industry

To date there is no defined relationship between academia, especially tertiary institutions and sectors of the tourism industry. This has created a gap in tourism research being conducted by academia without direct linkages to the development of the industry. It has also affected the quality of the output of the institutions since students do not have a grasp of the practicalities of the tourism industry. An establishment of strong mutually beneficial linkage between academia and tourism industry will foster the development of the tourism industry in Ghana. It is therefore recommended that a technical committee with members selected from academia and industry should be set up in the first year of the project to develop and implement guidelines that will promote stronger collaboration between academia and industry towards making academic research relevant to the growth and development of tourism in Ghana.

5.10 Recommendations on enhancing community involvement in the tourism sector and socio-cultural considerations

Section 2.11 describes some of the more successful community-based tourism initiatives in Ghana over the years. The traditions and culture of the Ghanaian people are integral components of the tourism product. Local communities must be supported to present their way of life and their customs to tourists and benefit from the development of tourism in their areas, through livelihood opportunities created by tourism.

UNWTO has identified seven ways that tourism can contribute to poverty alleviation in many developing countries. This has been termed the '7 ST-EP mechanisms model'. Each method presents a way the poor benefit, either through participation in the sector as entrepreneurs, suppliers and employees, or from grants, levies and donations as well as from improved infrastructure. The seven mechanisms are:

1. Employment of the poor in tourism enterprises
2. Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor
3. Direct sales of goods and services to visitors by the poor (informal economy)
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)
5. Tax or levy on tourism income or profits with proceeds benefiting the poor
6. Voluntary giving/support by tourism enterprises and tourists
7. Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors[61]

The most appropriate mechanism to support the poor in the country will depend on a number of factors, amongst others:

- The type of tourism offered by the country
- The volume, flow and destinations of tourists visiting the country
- The structure of the industry (i.e. whether it is dominated by large firms – international or domestic -, or whether the industry is predominantly composed of SMEs)
- The commitment of government to tourism and to supporting poverty alleviation initiatives through tourism
- The support of local authorities
- The support of civil society
- The strength and organisation of local communities
- The cooperation and participation of established tourism firms to include the poor in the sector and to support their activities
- capabilities of local people (access to education, micro-financing, decision-making process among others)

Tailored interventions must be designed in Ghana to exploit the best poverty reduction opportunities presented by these mechanisms based on a comprehensive analysis of the situation in the country. Until now, community tourism initiatives in Ghana have mostly been initiated and supported by foreign non-governmental organisations (NGOs) with access to external funding. It is crucial that this important role is not left to chance and to external opportunities but becomes an official policy,

[61] UNWTO (2004) *Tourism and Poverty Alleviation Recommendations for Action*, Madrid

as promised in the Ministry's vision statement.

Currently there is little pubic sector support for community-based initiatives and several of the foreign NGOs are now not involved in tourism initiatives anymore. The management at SNV in the Netherlands have taken a world-wide policy decision that tourism is no longer a sector that it supports and in Ghana it has stopped all its activities in tourism; the ST-EP projects implemented by Ricerca e Cooperazione in the Western Region have concluded and the project in Savannahland is near its end, although a ST-EP project is currently underway in Ada; and COSPE's (Cooperazione per lo Sviluppo dei Paesi Emergenti) project on restoring Fort Appolonia and developing the museum at Beyin is now completed. Despite strong support in the 1990s, United States Agency for International Development (USAID) and the US Peace Corps have not been involved in community tourism for many years.

While the work carried out by foreign NGOs has been excellent and they are often able to access funding from different channels, it is also important to encourage the involvement of more Ghanaian NGOs such as the Ghana Wildlife Society and Ghana Rural Ecotourism and Travel Office (GREET). These will be more likely to continue their support on a permanent basis as long as they are able to operate effectively and efficiently.

5.10.1 Establishing community tourism desks at MOT and GTA

This has been recommended in Section 5.2.2 to ensure that pro-poor tourism is addressed at the national, regional and local levels. These desks will monitor community-based tourism initiatives and activities around the country and lend support to Regional and District Officers working with local communities. Their role would be to ensure that local communities are empowered to participate in the Ghanaian tourism sector and to encourage new initiatives around the country.

5.10.2 Incorporating GREET into the GTA

Section 2.11.1 explained that GREET had a written understanding with the Ministry of Tourism and the GTA for financial and staffing support which it initially received but has now stopped. GREET performs a very important role ensuring the quality of community-based tourism initiatives and attractions and providing a marketing and reservation service. Without its support many of these initiatives would have failed as often local communities do not have the funds, reach and capacity to market their tourism products and attractions. It is important that GREET's work is supported and that the agreement with the Government is upheld. Without assistance, this NGO is in danger of ceasing operations and closing.

a. **It is recommended that GREET is absorbed into the GTA as an independent unit so that it has permanent Government support to continue its work**

It may be difficult for the MOT and GTA to justify to the Ministry of Finance and Economic Planning the continued financial support of an external organisation on a permanent basis. If GREET were to be absorbed into the GTA it would have an office to work from and staff salaries would be paid. There is precedent for such a situation. The Tanzania Cultural Tourism Programme was an initiative set up by SNV and the Government of Tanzania, originally as a five-year project. On the project's completion the successful programme was integrated into the Tanzania Tourism Board (see Box 2):

Box 2: Case Study: The Tanzania Cultural Tourism Programme[62]

The Tanzania Cultural Tourism Programme started as a five-year project jointly executed by the Tanzania Tourist Board (TTB), the Ministry of Natural Resources & Tourism (MNRT) and Netherlands Development Organization (SNV), from 1996 to 2001. Its objective was to engage local communities in Tanzania in income generating tourism activities to alleviate poverty and diversify the country's tourism products. By the end of the project, 17 Cultural Tourism Modules, now Cultural Tourism Enterprises (CTEs), were established.

Currently, there are 28 Cultural tourism enterprises located in various regions around Tanzania. Cultural tourism is a pro-poor/ community based tourism initiative in Tanzania that gives a chance to local people to organise some excursions/tours in their present natural environment where the real culture of the people is explored by tourists.

Since its inception Cultural Tourism has shown good potential for directly contributing to poverty reduction through direct tour fees, jobs/salaries for local people, markets for local product (foodstuffs, handcrafts), exposure to knowledge and increase in confidence to local people to do little-known things. SNV's work with TTB and MNRT played a major role in supporting the development of cultural tourism products known as Cultural Tourism (CT) Enterprises. They have endured the test of time, and all are in operation until now. A series of new ones are in the pipeline. Cultural Tourism business has of late aroused a lot of interest in individuals, communities, districts and regions of Tanzania. It inspires the local community with creativity and commitment in whatever business they are doing.

Source: SNV

5.10.3 Destination Management Organisations in Ghana

As stated in the Tourism Sector Medium-Term Development Plan 2010–2013 the experience of Ghana West Coast (GWC) of developing a Destination Management Organisation (DMO) based on a Destination Management Area (DMA) should be replicated in areas tourists already visit and those with tourism potential.

a. It is recommended that Destination Management Organisations are set up in Ghana's tourism zones

The DMO brings together different categories of stakeholders within a defined area to work towards common goals so that they can share their experiences, collaborate on joint projects, and most importantly unite to agree on the way forward for the development and management of tourism in the DMA. It enables them to present a united front to lobby for improvement and access any available funds from donors. According to the UNWTO: 'The Destination Management Organisation's role should be to lead and coordinate activities under a coherent strategy. They do not control the activities of their partners but bring together resources and expertise and a degree of independence and objectivity to lead the way forward. It follows that DMOs

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62 *Celebrating 15 Years of Cultural Tourism Programme in Tanzania: A Learning Journey;* Conference held at the Arusha Hotel, Arusha 2nd June 2011; Tanzania; http://www.snvworld.org/sites/www.snvworld.org/files/publications/celebrating_15_years_of_cultural_tourism_programme_in_tanzania.pdf

must develop a high level of skill in developing and managing partnerships. Though DMOs have typically undertaken marketing activities, their remit is becoming far broader, to become a strategic leader in destination development'[63].

It is important that the DMO is officially and legally recognised by MOT, GTA, MMDAs and the Private Sector Operators in the tourism industry. It should be registered with the Regional Coordinating Council, GTA and MMDAs and become a legal entity as a tourism sector association so that it can apply and receive the funds from donors. This will provide the DMO with an official status to represent the collective interests of the tourism sector of the DMA, especially those of the local communities living in the area. The Ghana West Coast DMO is a registered legal entity.

The size of the DMA will determine the structure of the DMO. For instance, the Ghana West Coast DMA was deemed to be too large to be managed by just a centralised institution. To ensure that stakeholders regularly meet at convenient times in a location close to where they operate and that their interest is kept up, three Tourism Area Partnerships (TAP) were created to meet periodically and report their deliberations, concerns and requests to the DMO Unit who visit the partnerships regularly.

It is important that the following stakeholders are represented in the DMO:

- The GTA District Officer(s) (several if the DMA covers different Districts) and Regional Officer(s)
- Key District Assembly Officers such a the District and Budget Planning Officers
- Representatives of the private sector; all tourism businesses should be encouraged to become active members of the DMO
- NGOs operating in the area with particular interest in community development and environmental and cultural conservations and protection
- Representatives of the local community in the DMA; these are local residents that offer tourism services or supply tourism enterprises
- Representatives of Traditional Authorities

In Ghana West Coast (GWC), the ST-EP project established Town Tourism Development Committees (TTDC) to organise local community members involved in providing services to the tourism sector. The TTDCs became members of the DMO to represent community interests and to inform other partners in the DMA about the services that the community offers. They are also able to voice their needs and concerns to be considered and discussed by the DMO and vote on issues of common interest, demonstrating participatory approach in tourism. This allows the local community to be on an equal footing with other stakeholders in the destination areas and to garner support from partners in terms of marketing and training.

A professional unit experienced in managing organisations should head the DMO. Ideally managers would be full-time employees of the DMO but this may be difficult to organise and fund, therefore it is recommended that GTA Officers take over the organisation and implementation duties on behalf of the DMO. They should be supported by the GTA head office.

[63] UNWTO (2007) *A Practical Guide to Tourism Destination Management;* Madrid, Spain

b. Establish a funding mechanism to finance the staffing and activities of the DMO

The DMO will need funding to implement decisions of the stakeholders, especially if professional staff are hired. A mission by the UNWTO ST-EP programme to GWC in 2011 considered funding options for the recently set up DMO. Several were described and are detailed in Appendix 5.10.1. These include:

- Government allocation of public funds, such as the Tourism Development Fund
- Donors providing sufficient funds to set up the unit
- Raising of local hotel taxes or levies
- A wider tourism tax
- Membership fees paid by firms in the tourism sector
- Private sector sponsorship alliances
- User fee, sponsorship and advertising
- Contributions in kind
- Allocation from gambling and lotteries
- Generating funds through a DMO website
  - Providing an online booking service
  - Generating income through Google AdScence
  - Affiliate programmes
  - Selling products through an online shop
  - Distributing a regular newsletter and setting up database list for mail shots
  - Selling advertising space
  - Purchasing specialist software and online destination management system
- Organising special events with part of the profits going to the DMO
- Deriving some profits from meetings organised by NGOs and DMO members in the DMO
- Recruiting experienced fund raisers to coordinate various funding options and to prepare proposals
- Recruiting experienced volunteers to further develop the DMO concept and the DMO Unit[64]

Certain funding agencies should be approached to finance the operation of the DMO. For instance the Savannah Accelerated Growth Development Agency (SADA) could be approached in the North to support initiatives being undertaken by the DMO in Upper West, Upper east and Northern regions SADA is mandated to provide strategic planning guidance to Government as regards the implementation and review of an accelerated development strategy for the Northern Savannah Ecological Zone; mobilise human, financial and other resources for the implementation of the accelerated development strategy; and co-ordinate existing and future development and related policies affecting the Northern Savannah Ecological Zone with a view to ensuring coherence in policy-making and implementation. Although tourism is not a sector that the institution has focus on in the past, recently it has expressed an interest to include the sector in future plans.

[64] UNWTO (2011) *Tourism Marketing and Product Development Strategy for Ghana West Coast – Evaluation of Progress Made Since May 2010* – ST-EP project, internal report

5.10.4 Developing partnerships with local community

Communities form an integral part of the tourism experience and they should participate in the development of cultural tourism, nature tourism, ecotourism and adventure tourism in their areas.

However, because local communities lack access to the markets, financial means, know-how, and technical abilities, it is of vital importance that other stakeholders from both public and private sector provide support.

a. Community involvement in tourism development projects in cultural tourism, nature and ecotourism, and adventure tourism needs to be intensified

Based on international practices, a **successful partnership meets the expectations of both the community and private sector** with regard to:

- permanence of the partnership
- extent of financial and non-financial benefits generated by the partnership
- contribution of the partners to the financial and non-financial costs and benefits
- contribution of the partners to responsibility for running the partnership enterprise
- promotion of supply and value chain linkages through networking and apprenticeships

Community inputs in a partnership may vary from exclusive use of land, services, production of food and other goods for lodges, guaranteed use of facilities to complementary products, labour, cultural performances and supply of high demand product. The private sector could bring in capital investments, revenue shares, asset transfers, employment, outsourcing of services, marketing, product development, and loans. Table 35 shows examples of types of partnerships between private sector and community.

Table 35: Types of partnerships between the community and the private sector

Type of Partnership	Private Sector Inputs	Community Inputs
Development of new venture	Capital investment Land rental payment Equity shares/dividends Bed night levies Revenue share Asset transfer Training Employment Outsourcing of services	Exclusive use of land Maintenance of concession area Options on future development Services (e.g. laundry)
Benefiting communities from existing private sector enterprises	Bed night levies Land rental payment Revenue share Training Employment Outsourcing of services	Exclusive use of land Maintenance of concession area Options on future developments Services
Good neighbours agreements	Bed night levies Employment Compensation for wildlife	Conservation/resource management activities Goodwill

	damage Development funds Payments to headmen/community Capital investment/loans Outsourcing	Production of food and produce for lodges
Utilising an existing community-based enterprise	Capital investment Training Outsourcing of services Marketing	Guaranteed use of facilities (e.g. for campsites) Services (e.g. cooking, laundry) Tourism attraction (e.g. cultural attraction)
Assisting community to develop a new community-based enterprise	Capital investment Training Marketing Development funds	Complementary product Labour
Buying in services or products	Training Purchase agreements Accommodation	Cultural performances Visiting rights
Development and marketing of tourism related products	Guaranteed outlet Training Marketing	Supply of high demand product

Sources: Getting the Lion's Share from Tourism - Private Sector-Community Partnerships in Namibia, Volume 1, Background report and review of experience. Poverty, Inequality and Environment Series No. 1, International Institute for Environment and Development (IIED) in association with Namibia Community Based Tourism Association (NACOBTA) 2001

Several stakeholders in both the source area and the destination are involved at different stages of travel. Table 36 illustrates the opportunities, and shows where partnerships with Community-based Tourism (CBT) in product development and marketing can be developed.

Table 36: Travel stages and the stakeholders involved – partnership opportunities

Stage of travel	Offered as a service by : (Stakeholders)	Location	Useful in:
Travel information	Publishers of travel guides, the media, tourist boards, exhibition corporations, other travellers	Source markets	Marketing
Intermediary services	Travel agencies	Source markets	Marketing & product development
Travel preparations and organisation	Outbound tour operators or FITs	Source markets	Marketing & product development
Travel to destination	Transport companies	Source markets - destination	Marketing & accessibility
Organisation of travel at the destination	Inbound travel agencies	Destination (usually national centres)	Marketing & product development, training
Travel information at destination (FIT or semi-package	Tourist boards, incoming agencies, hotels, guesthouses, regional	Destination: National to regional level	Marketing and product development,

travellers)	information offices, other travellers		training
Inland transportation	Transport companies (airlines, bus companies, car rental agencies)	Destination: National to regional level	Accessibility, product development, marketing
Accommodations	Hotel operators, hotel chains, holiday centres, B & Bs, lodges, hostels, homestays, camping sites	Destination: National to regional level	Product development and marketing
Souvenirs/gifts	Craftsmen, weavers, local snack providers	Destination: National to regional level	Support to product development and marketing (identity)
Food	Operators of accommodation, restaurants, snack bars, food shops	Destination: National to regional level	Product development – enriching the experience
Local transportation (minibuses, jeeps, boats, horses)	Local transport companies, local population (e.g. fishermen, porters)	Destination: National to regional level	Product development
Other activities (shopping, entertainment)	Restaurant owners, operators of souvenir shops, photo stores, bathing item shops etc.	Destination: National to regional level	Support to product development
Return trip	Transport company	Destination – source market area	Marketing - accessibility
Travel follow-up activities	Individually organised or via the tour operator	Source market area and destination	Marketing – building repeat trade

Source: Adapted from the Ecotourism Training Manual for Protected Area Managers, 2002

b. Create partnerships to develop and market the creative industry (handicrafts, art, music and dance among others)

The creative industry is generally associated with tourism, but production of handicrafts and artistic performances are not confined to tourist areas. Craftsmen and artists may come from areas that are not typical tourist destinations and their traditional skills will not be well linked with the markets. Craftsmen and artists outside tourist destinations may have too few local customers and are often unable to access more distant markets because of lack of market and marketing knowledge and high transport cost.

Partnerships with the following types of establishments should be considered:

- ***Lodges, hotels and resorts*** to set up craft stalls selling products made by community members at the accommodation establishments; or to offer their clients a visit to a community settlement where these crafts can be bought. Tourists themselves prefer to buy directly from the producers to be assured that the producers will benefit and not just the intermediaries. Accommodation establishments benefit indirectly as the visit to the community could be sold as another excursion or attraction for tourists. Local artists can exhibited their art at accommodation establishments and local performers may be hired to put on shows for tourists

- ***Shops and craft centres*** who buy from producer groups or cooperatives and apply their own mark-up
- ***Trading houses*** that operate on fair trade principles on the basis of a long-term association with producer groups with intensive input at the beginning and periodic visits afterwards. Trading house can provide training, sometimes drawing on donor funds, in product development, market development, bookkeeping and finance, and quality assessment
- ***Airports and bus terminals***

c. Create partnerships with hotels and resorts

In some countries, hotels and resorts have set up partnerships with communities. One example is Menjangan Jungle and Beach Resort in West Bali National Park in Indonesia. Its community development programme includes:

- ***partnership with the farmers:*** of the Pejarakan region (originally five farming villages) for planting trees, long beans, corn and grass in order to increase the annual volume of crops
- ***barter programme:*** the resorts provides organic fertilisers to farmers to grow grass for the horses at the resort stable; the grass is bartered for rice, no cash money is used; rice used for bartering is mostly bought from the villages
- ***educational programme (awareness raising):*** the resort provides conservation education within the formal curriculum of the schools located in the seven villages (approximately 350 students) surrounding the national park. In addition, schools visit the property and the park every month on a rotating basis. Club 'Envirokids' has been established.

The resort also conducts free lessons on diving for the locals. The objective of all educational programmes is to create a pool of potential future employees, as the resort aims to employ 80 per cent of its staff locally. The local staff are encouraged to maintain their farms and farming activities, which will support the employees through difficult times (unpaid leave taken during the past years).

In brief, the characteristics of the partnership include:

- ***the major initiator***: the resort
- ***outsourcing*** from the local villages: barter trade, no cash
- a***wareness raising programme:*** benefits of conservation; future employee pool
- employment
- ***low direct community involvement:*** employment and supply of goods and services.

In Ghana, international hotel chains could be approached to establish models for partnerships between local communities and hotels. International hotels not only run environmental programmes but they also have staff responsible for community relations. These hotels should promote local tourism architecture, design and furnishing and buy from and hire local craftsmen to adorn their establishments.

A pilot project could involve an international hotel in Accra (current or up-coming new hotel) and another project could be developed with a locally owned hotel.

d. Encourage outsourcing to local farmers and fishermen

The marketing and sales of agricultural and fish products are difficult for local farmers and fishermen who do not have proper direct contacts with hotel marketing managers and F & B managers. Quality, quantity, consistency, regularity and timeliness are major issues that inhibit communities from supplying hotels. In order to increase outsourcing to local farmers, the farming community should set up cooperatives to supply the hotels. These cooperatives should be able to guarantee the quantity, quality and supply infrastructure. The Ghana Hotel Association should provide training on the quality, quantity and product required and on supply processes for the farmers.

5.10.5 Gender, age and vulnerable groups

The tourism sector is often promoted as a sector that provides employment and income generation for women, the youth and vulnerable groups such as the disabled and the elderly. As a major employer, tourism can significantly contribute to poverty reduction and can benefit disadvantage groups, offering jobs to the youth (under 35 years old) as well as to women. With low barriers to entry and a wide employment multiplier-effect, it provides opportunities for residents of the country that otherwise may find it difficult to earn a living. However, without proper policies, strategies and controls in place, working in the tourism sector can be arduous and exploitative.

According to a UNWTO study, very few governmental tourism authorities address gender related issues directly in their activities[65]. Young people are more likely to suffer unemployment, take on casual work, part-time work and low-quality jobs and command low wages. As a sector with low barriers to entry tourism can provide the youth with good opportunities for employment and entrepreneurship. However, it is important that policies and initiatives are in place to promote wage employment, self-employment and programmes aimed at disadvantaged young people.

Disabled people may suffer from negative attitudes by employers in the tourism sector who are deterred from engaging them fearing that they are not up to the tasks. Other barriers to employment include transport to work, access at work and health issues. However, there are many jobs that disabled people can do either directly in the tourism sector or within the supply chain. Often disabled people associate to provide services e.g. forming an association to manufacture handicrafts to sell to tourists or through third party outlets. However, they usually need support to become established and to build up relations with tourism firms.

a. Ensure that the inclusion of women, the youth and disadvantaged groups in the tourism sector is supported by Government policies and strategies

The focus of tourism policies and strategies must outline incentives to encourage tourism firms to employ local residents as well as certain categories of workers such as women, minorities and disadvantaged groups (e.g. older workers, people with disabilities), promoting tourism and hospitality as a valid profession with recognised careers paths and enhancing career progression and opportunities by, for example, providing scholarship programmes targeted at these groups

[65] Peeters, L. W. J. (2009), *Baseline Research Agenda, UNWTO Taskforce Women Empowerment in Tourism*, Madrid, unpublished document

b. Ensure that social protection legislation regulating the tourism sector extends to women, the youth and vulnerable groups

The employment rights of vulnerable and disadvantaged groups must be protected and included in the tourism legislation. These include setting fair wages comparable to other employees, decent and flexible working conditions, equal opportunities and access to employment

5.10.6 Case studies and recommendations on empowering women through tourism

Section 2.11.6 described five goals to support women's empowerment and protect women's rights through better tourism work identified in the UNWTO/UN Women Global Report on Women in Tourism 2010. This section presents success stories from around the world that achieve these objectives as well as the broad recommendations of the Global Report on Women in Tourism 2010.

Case study: Three Sisters Adventure and Trekking Company, Nepal

Established in 1996 in Pokhara , Nepal by the Chhetri sisters, the Three Sisters Adventure and Trekking Company offers women-focused trips with female guides and porters. With approximately 1,000 clients a year, the company employs 150 staff. It trains women from local villages to become trekking guides and porters. The website for the Three Sisters Adventure and Trekking Company is at the time of writing this plan under construction. It is located at the following address:
http://www.3sistersadventuretrek.com/welcome

In 2012, the company was honoured with a Virgin Holiday 2012 Responsible Tourism Award for Best in a Mountain Environment

In 1999, the Chhetri sisters set up the Empowering Women of Nepal (EWN) NGO to empower disadvantaged rural women of Nepal through adventure tourism, either as guides or as service providers on the trekking routes. EWN also established a home for girls who have been rescued from child labour and exploitation. The girls from all over Nepal are provided with food, shelter, education and support.

This case study shows that through training and education and the entrepreneurship of leaders with acumen, women in Nepal have opportunities to secure steady and fairly paid employment. Funds provided by the tourism business provide shelter and improved living conditions to protect vulnerable children.

Case study: Popenguine Women's Group for the Protection of Nature (RFPPN), Senegal

The Popenguine Women's Group for the Protection of Nature started as an environmental group located at the Natural Reserve of Popenguine on the coast 70 km South of Dakar in Senegal. Its original objective was to ensure the protection of the natural habitat before local residents in their search of wood for cooking destroyed resources. Through their efforts, the women were able to protect 2.493 acres of the park in which a variety of plants, birds, and other animal species have been able to thrive. The reserve has become an important attraction for tourists, and now provides the women with additional income-generating opportunities.

The Women's Group offers services to tourists such as accommodation (5 houses and a dormitory with 24 beds), excursions and visits with the local community. In

2008 they received 551 visitors who stayed on average between two to three days. The organisation had 116 members in 2009.

Case study: Women Succeeding through Tourism Handicrafts in the Okavango Delta, Botswana

The wildlife of the Okavango Delta wetlands in Botswana attracts around 120,000 tourists as year[66]. The culture of the area is strongly reflected in the colourful handicrafts made by local communities of the Delta such as traditional beads and ostrich shells, which adorn reed baskets. The art of weaving the baskets has been passed down from mother to daughter over generations.

To organise themselves and improve the marketing of their handicrafts, the women have formed cooperatives to lobby for their interests, maintain the quality of their products and provide on-going training to the estimated 1,500 members. The women have been supported with training in bookkeeping, public relations and English and in formulating marketing strategies to help them sell to tourists. The income generated significantly contributes to improving their livelihoods and those of their families.

A link to one of the Delta cooperatives is located at the following address:
http://www.botswanacraft.bw/shop/bskt_info4_pg.html

Recommendations made in the Women Global Report on Women in Tourism 2010 to promote the empowerment of women through tourism include:

By theme

Employment

- Increase awareness of the important economic role that women play in the tourism industry
- Strengthen legal protection for women in tourism employment; such protections include minimum wage regulations and equal pay laws
- Improve maternity leave requirements, flexible hours, work-from-home options, and arrangements for childcare

Entrepreneurship

- Facilitate women's tourism entrepreneurship by ensuring women's access to credit, land and property as well as providing appropriate training and resources to support women's enterprises

Education

- Promote women's participation in tourism education and training and improve the educational level of women already working in different areas of the industry through a targeted and strategic programme of action

[66] Source: Tourism development in the Okavango Delta; Factsheet 8/2009; Harry Oppenheimer Okavango Research Centre, University of Botswana

Leadership

- Support women's tourism leadership at all levels: public sector, private sector, and community management by establishing leadership programmes at the national level and in large and small-scale tourism enterprises

Community

- Ensure that women's contribution to community development is properly recognised and rewarded by taking into account women's unpaid work and by monitoring tourism activities carried out in the home and in the community

By stakeholder groups

Private sector

- Promote gender equality and women's empowerment as fundamental components of Corporate Social Responsibility activities, in line with the Global Compact – UN Women's Empowerment Principles[67]

Public sector including tourism policy-makers

- Take proactive steps to mainstream gender in tourism policy, planning, and operations.

International organisations and civil society

- Call on governments, the international community, and the private sector to protect women's rights in tourism and to monitor progress in the empowerment of women through tourism.
- Collaborate with UNWTO/UN Women to develop programmes and projects dedicated to promoting gender equality and women's empowerment through tourism.

[67] See: http://www.unglobalcompact.org/Issues/human_rights/equality_means_business.html

5.11 Environmental and cultural protection and management

The impact on the environment resulting from tourism activity can be managed and minimised. It is important that tourism and environmental policies are synchronised to achieve minimal damage and to protect Ghana's natural and cultural assets for tourists to enjoy.

According to UNEP and UNWTO, 'sustainable tourism aspires to be more energy efficient and climate sound (e.g. by using renewable energy); consume less water; minimise waste; conserve biodiversity, cultural heritage and traditional values; support intercultural understanding and tolerance; generate local income and integrate local communities with a view to improving livelihoods and reducing poverty. Making tourism businesses more sustainable benefits local communities and raises awareness and support for the sustainable use of natural resources'[68].

5.11.1 Create a desk at the MOT and the GTA to address environmental issues related to tourism

It is recommended in Section 5.2.2 that desks are to be created at the MOT and the GTA to ensure that environmental issues related to tourism are addressed at the national level. The Officers occupying these desks must be dedicated to working with the appropriate institutions to ensure that tourist sites are environmentally well maintained and sustainable and that enterprises and local residents that are operating in the tourism sector are doing so in an environmentally sound manner.

a. GTA Officers must work with the EPA to ensure that tourism enterprises operate in a sustainable manner, report the impact of their operation and are regularly inspected

GTA officers will lend support to the EPA by ensuring during their regular inspections that enterprises that are required to hold an Environmental Impact Assessment certificate and are operating without one are reported. They should also ensure that tourism enterprises regularly report the impact of their operation to the EPA as required by LI 1652. The GTA should provide assistance to enterprises that are ignoring their obligations in the form of capacity building to help them operate sustainably. If they persist in working illegally, the GTA Officer should be empowered to close them down until they abide by the regulations.

b. GTA Officers must work with MMDAs and the Town and Country Planning Department to ensure that tourist areas are environmentally well maintained and that public waste management services are effective and efficient

The GTA Officers should work with Officers at the Regional Coordination Councils and at the District Assemblies to ensure that:

- tourist areas such as attractions, beaches and entertainment zones are well maintained and are free of pollution (land, water, air, and noise) and littering
- there are sufficient waste receptacles in tourist areas and that they are regularly emptied
- public waste management facilities such as landfills and used water treatment centres are available to tourism enterprises

[68] UNEP and UNWTO (2011) *Tourism – Investing in energy and resource efficiency; chapter in UNEP's publication: Towards a Green Economy*, Paris

- measures taken by the municipal authorities to collect, categorise, and store liquid and solid waste are efficient and that collections are regular
- the local population are made aware to their responsibility through awareness campaigns, publicity, competitions and so on

5.11.2 Cooperation to establish environmental protection systems and to protect cultural assets

Managing the impacts of tourism on the natural and cultural environment at a destination requires accurate and extensive measurements. These must be taken regularly over time using a set of defined indicators so that comparisons can be made and conditions monitored.

a. Ministry staff must liaise with the Ministry of the Environment, Science and Technology (MEST) and with Officers from the Wildlife Division (WD), from Ghana Museum and Monuments Board (GMMB) on establishing environmental protection systems and on protecting cultural heritage assets

Indicators provide both quantitative and qualitative information that is essential for planning and managing tourism in a sustainable manner, for benchmarking and for providing an effective system to support better decision-making.

b. Work with MEST to develop a set of indicators that will measure environmental impacts at tourism sites

A joint project of the MOT and the MEST should be set up to measure and monitor the impact of tourism on the environment with a view to managing them better. A comprehensive UNWTO report on Sustainable Indicators for Tourism[69] explains that indicators measure:

a) changes in tourism's own structures and internal factors,
b) changes in external factors which affect tourism, and
c) the impacts caused by tourism

Based on the information provided by the indicators, decisions can be made on selecting actions to remedy problems and anticipated future problems and on developing a regulatory framework. The key is to select the right set of indicators at the appropriate level for the area being monitored.

There are many categories of indicators that are used for different circumstances. The UNWTO report indicates the following environmental and management indicators:

- early warning indicators (e.g. decline in numbers of tourists who intend to return)
- indicators of stresses on the system (e.g. water shortages, or crime indices)
- measures of the current state of industry (e.g. occupancy rate, tourist satisfaction)
- measures of the impact of tourism development on the biophysical and socio-economic environments (e.g. indices of the level of deforestation, changes of consumption patterns and income levels in local communities)

[69] UNWTO (2005) *Indictors of Sustainable Development for Tourism Destinations – a Guidebook,* Madrid, Spain

- measures of management effort (e.g. cleanup cost for coastal contamination)
- measures of management effect, results or performance (e.g. changed pollution levels, greater number of returning tourists)
- socio-cultural stress indicators

The information provided by indicators form the basis for developing a policy and regulatory framework. Benchmarks may be set for firms to control water usage, waste management, emissions etc. so that they operate within acceptable norms. Cultural indicators may measure levels of cultural degradation, authenticity, and dilution of traditions, arts and crafts.

c. Develop guidelines for establishing a visitor management system at each attraction and cultural heritage site that attracts large flows of tourists at certain times

Section 5.2.2 recommends seconding Officers from both the WD and the GMMB to work with the Ministry of Tourism on environmental issues concerning the tourism sector and on the maintenance and/or restoration of cultural assets such as traditional and historical buildings. The MOT should also be kept aware of any plans of the WD and the GMMB involving tourism in areas under their jurisdiction.

Cultural heritage sites must be properly managed to ensure that the monuments and artefacts are preserved and properly presented and interpreted for tourists to enjoy. A visitor management system should be established to facilitate access and control visitor flow. Ways to generate money from tourists must be devised with the profits used to invest in maintaining and developing the site, preserving the cultural assets, providing income for the local population and funding for the marketing of the site. Rules and regulations must indicate where visitors can go in the site, which complementary services should be permitted and located (e.g. guiding services, souvenirs, snack bars etc.), opening and closing times and so on.

5.11.3 Illegal activities

Illegal activities have serious environmental consequences that impact on tourism. Sand winning and the cutting of mangrove forest contribute to coastal erosion and destroy beaches. Consequently the quality of beach tourism becomes degraded and less attractive to tourists. Illegal mining damages ecosystem, pollutes rivers and causes problems for people living nearby and downstream from the mining operation.

a. Support the EPA and the MMDAs in stopping illegal mining, cutting of mangroves and sand winning

Thus it is important that these activities are prevented. The GTA must support and join in campaigns aimed at informing the population about the consequences of these illegal activities, the penalties that they will suffer if they are caught and alternative pursuits that they can engage in.

5.11.4 Corporate Social Responsibility (CSR)

Section 2.10 explains that the impact of the oil, gas and mining sectors on the environment is monitored and new projects have to conduct stringent environmental impact studies and submit them to the EPA for its approval. Much consultation with local stakeholders is carried out during these studies, including with the GTA Regional Office responsible in the area. However, how these projects affect the quality of tourism in the zones where they are located is rarely serious taken into account. The oil and gas projects in the Western Region are already having an impact on tourism businesses operating on the coast as well as on the environment as substantial forest areas are being cleared to make way for construction and equipment. According to some of the stakeholders interviewed there is uncertainty about the future.

a. Encourage the Corporate Social Responsibility (CSR) of large businesses from other sectors to protect the environment and contribute to the tourism sector

It is therefore important that the businesses that are developing these projects are made to accept responsibility for the impact of their activities and compensate stakeholders in the sector. For instance, many roads along the coast are not tarmacked and at some times of the year are virtually unusable for certain types of vehicles. As compensation the businesses running oil, gas or mining projects could be requested to contribute to the tourism sector in the area, for instance by repairing a road used for tourism, building a bridge to allow access to an attraction or putting up signage to direct visitors to tourist attractions and tourism enterprises in the area around the project. The following actions are recommended:

b. Conduct impact studies in tourism areas to identify the projects that are affecting tourism and the environment

c. Identify specific locations which are visited by tourists or have tourism potential in these areas to be designated as tourist sites by the Minister as prescribed in the Tourism Act 817

d. Approach these businesses and obtain their commitment to behave ethically and contribute to economic development by contributing to the tourism sector and improving the quality of life of the local community living in the area around the projects

e. Invite the businesses to regularly attend the Public Private Forum so that they are aware of developments in the sector and contribute their knowhow and experience to the forum

5.12 General recommendations

This section examines general aspects of tourism development that should be established throughout the country to improve the quality and range of tourism products available in Ghana. These include developing:

- Directional and informational signage
- Viewpoints at areas of natural beauty
- Campsites to provide or increase accommodation at selected tourism sites

5.12.1 Developing tourism signage, viewpoints and campsites in Ghana

The UNWTO has for many years recommended the internationalisation of tourism signs and symbols so that tourists are able to immediately recognise international standards that are meaningful[70]. Signage should contribute to the tourist experience by easing access and providing useful information. This requires Government to formulate a tourism signage policy to develop a system based on international designs, general content and guidelines on standard symbols to be used around the country.

There are main three categories of tourism signs:

- ***Directional signs:*** designed to guide tourists along the most appropriate routes during a journey, particularly where destinations and attractions are difficult to find

- ***Services signs:*** indicating the locations of facilities and services including rest areas, information centres, restaurants, accommodation, entertainment centres, shopping areas, car parks, toilets, medical centres and so on

- ***Informational signs:*** providing information at the attraction or destination on the background, history and/or stories about the attraction or destination

There is a lack of tourism signage throughout Ghana including directional signs to tourist destinations and attractions, signs to tourist facilities and services and interpretation panels at attractions.

a. The MOT must formulate policy guidelines to develop a standardised tourism signage system in Ghana

The MOT must have a policy that will set guidelines for tourist signage and symbols to be developed in Ghana. Institutions that are likely to erect signs such as the Ministry of Transport, the Ministry of Chieftaincy and Culture, the Ministry of the Environment, Science and Technology as well as private sector stakeholders wanting to direct tourists to their facilities would be consulted in the policy formulation so that an agreement can be reached on the types, design, colours and so on.

b. The GTA in partnership with the MMDAs must formulate and implement a signage strategy for each region in Ghana

The GTA in partnership with the MMDAs in all regions of Ghana should monitor

[70] For more information, see: UNWTO (2001) *Tourism Signs and Symbols,* Madrid

compliance to the policy and be empowered to control the usage of tourism signage. Based on the policy, a signage strategy must be formulated and implemented:

Directional and service signage: The following criteria should be taken into account:

- Appropriate type, size, colour, material, lettering – size, font, colour - should be used as prescribed in the policy
- Only sites and attractions that actually exist should be indicated by a sign – there is no point directing visitors to attractions that do not exist anymore, are inaccessible so cannot be seen, are in very poor condition presenting little interest to tourists, or are buried. This will cause disappointment and give a negative impression of the destination
- Signs should be placed a good distance before a turn-off to the destination, site or attraction, perpendicular to the road so that they are noticed and assimilated and motorists do not miss the turn. A second sign can be placed at the turn off
- On transit roads, distance to the destination, site or attraction should be indicated to give an idea how far it is
- Signs should be clear and large enough using colours and fonts that are recognised internationally. Tourist signs are generally on brown background with white lettering
- Locations for directional signs should follow uniform traffic standards. Approval must be obtained from the appropriate, responsible agencies prior to selecting/placing signs

Photo 5.12.1 Example of directional signage with distances to destinations (Ireland)

Photo 5.12.2: The sign indicating the road name is different from a sign indicating the tourist attraction using the international brown and white design. (Windhoek, Namibia)

A comprehensive all encompassing signage project must be implemented by the Government to support the tourism industry. It should be a standardised system following international norms such as shown in Photo 5.12.2 in Namibia

Informational signage: Informational signs are usually positioned at attractions and tourist sites like viewpoints to explain what is being seen. They should be clear and consistent around the country with the same graphic background, colour, official tourism logos (Ghana, regional and local), fonts, and materials used for the signs so that tourists will instantly recognise them. Informational or interpretive signs and panels must be protected from graffiti and vandalism with anti-graffiti overlay or film which also protects against UV. Typeface should not be condensed and lettering should be appropriate for the distance and speed at which a sign is viewed. All upper case writing should be avoided, as text in all is more difficult to read than a combination of upper and lower case. Photo 5.12.3 shows a sign depicting an itinerary that tourists can follow. Photo 5.12.4 presents a local map showing all the attractions and services in an area on Rodrigues Island, territory of Mauritius. Similar panels are located throughout the island.

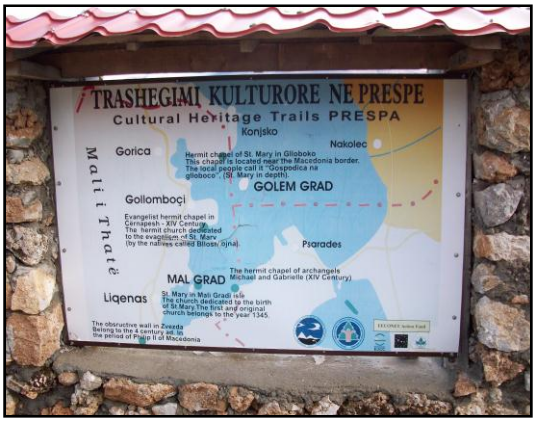

Photo 5.12.3: An example of an interpretive sign: a tourism map of the Prespa area in Albania's Korça Region at the entrance of the national park (Prespa, Albania)

Photo 5.13.4: An interpretive sign showing tourism attractions and facilities in the Petite Butte area on the Island of Rodrigues, Mauritius (Rodrigues, Mauritius)

Viewpoints: It is important to showcase the magnificent views that are in every Region and District in Ghana (see Photos 5.13.5 and 5.13.6). Viewpoints must be prepared to encourage tourists to stop and admire spectacular views on their travels around Ghana. Investments may include levelling and gravelling car park areas at suitable locations although without compromising the visual and atmospheric quality of the site, erecting signs to explain what can be seen and building simple infrastructure to provides facilities and services for tourists. This would allow local entrepreneurs to establish small businesses such as catering services and limited retail facilities.

Photo 5.12.5 View from Kwahu Hill where the annual paragliding festival is organised – the facilities need refurbishing

Photo 5.12.6: View from the ridge at Mole National Park

Campsites: The establishment of campsites especially at locations where accommodation is limited would provide the opportunity to develop new tourism products in Ghana suitable for adventure tourists, both international and domestic. The following specifications should be respected when developing a campsite:

- The site should be located at least fifty meters from a water source on a barren patch of land to avoid disturbance to vegetation
- The wind direction should also be taken into consideration
- Campsites should be sized to accommodate at least fifteen up to thirty double sleeping tents with a separation of at least two metres between tent pads (suggested surface area is between 1,200m^2 and 2,000m^2)
- Tent plinths (i.e. raised flat spots for erecting tents) should be located so that they allow for natural drainage of rain water away from the tent
- Low-cost ecological toilets should be available as it is not possible or advisable to build conventional sewage systems, based on flush-toilets at the sites. These should be erected at least fifty metres away from the water source and away from habitation tents.
- Care should be taken to prevent waste from kitchen such as kerosene, oil, grease, leftovers and so on from flowing into the water source.
- Campsites should have areas marked for keeping pack animals such as horses or mules if these are used
- Kitchens should be available and covered. Ideal kitchen size should not be less than 4.5 by 6 metres. Recommended fuel for cooking meals for the camp should be LPG and if possible the use of solar cookers must be encouraged. If completely enclosed the kitchen should be well lit with ample room for ventilation. Proper counters for placing burners, working tables, storage of groceries and rations, washbasin, storage of crockery, cutlery and serving dishes and also a place for waste receptacles should be earmarked
- Adequate security and safety arrangements should be made at the camp facility employing local people as guards
- There should be adequate provision for garbage generated by campers to be disposed with plenty of receptacles in the camp and a reminder that patrons should use them. Garbage should be segregated into biodegradable waste (e.g. kitchen waste), non-bio-degradable waste (e.g. thermo coal products, aluminium foil, cigarette butts) and waste that can be recycled (e.g. newspapers, bottles, cans).
- There should be adequate information for tourists against littering, noise and smoking at campsites

It is important that ownership of the camps developed stays with the communes where the camps are developed. However the communes will not run the campsites – the public sector should not run tourism facilities – these could be leased to the private sector. The length of the lease should be negotiated; however, it should be long enough for operators to become established, for their marketing to be effective and for the return on investment and effort to be worth the operator's while. Therefore the concession should not be less than 5 years.

The development of private sector campsites should also be encouraged but these should comply with the guidelines set out above.

5.13 Summary of recommendations

To guide the development of the tourism sector in Ghana over the next 15 years key recommendations are proposed in this 2013-2027 Plan to achieve the desired results, as summarised in this section of the report.

Policy and regulatory framework

- In consultation with tourism stakeholders update and adapt the current tourism policy so that a concise document can be present to the Cabinet and Parliament for its ratification
- Initiate a PR campaign aimed at high-level government officials and people of influence in Ghana to explain the value of the tourism sector
- Engage a specialist PR firm to carry out the assignment, which will include organising an international conference to generate media exposure; disseminate the messages of the conference; create an online presence and a lasting legacy. This will build up a general understanding of the tourism sector in Ghana by addressing misguided and negative views of the industry, in particular those held by other government institutions, which are affecting its credibility as a productive sector generating income and jobs and benefiting other sectors of the economy
- Review the wording in the Tourism Act 817 to ensure that there are no ambiguities and to ensure that all the functions of the GTA are clearly spelt out
- Consider involving the private sector in quality assurance and monitoring of the sector, especially the hotel classification system
- Consider collecting the 1% levy from tourism enterprises that are above a certain size or a certain turnover
- Agree a formula for the application of the Tourism Development Fund to the relevant tourism activities
- Highlight the loss of revenue resulting from the strict and expensive visa regime and continue lobbying policy makers to review the system

Institutional framework and the role of institutions in implementing the master plan

- Address the problem of leadership instability
- Develop a demonstration tourism zone as a tourism development model which can be replicated in other areas of Ghana
- Designate the Ministry as a 'Technical Ministry', through appointments of key technical personnel, functions and outlook
- Improve the working environment of the Ministry
- Build the capacity of Ministry staff
- Strengthen the use of Information, Communication and Technology at the Ministry and at its implementing agencies
- Restructure Directorates at the Ministry and their functions:

    - *Create new desks:* Environment and community participation desks, if possible under a new Directorate - Responsible and Community Tourism Directorate
    - *Create desks and appoint officers in other organisations to handle tourism matters/issues:* at the Ghana Museums and Monument Board and at the Wildlife Division

- Strengthen the MOT's monitoring and evaluation function
- Strengthen the Ministry's communications and information technology functions
- Create a permanent inter-agency task force to coordinate the implementation of the Master Plan
- Ensure that the Master Plan is legally adopted
- Appoint professional staff at senior management level at the GTA and not political employees
- Establish an environment at GTA conducive to building a positive and productive working structure
- Keep the future structure of GTA to a manageable size
- Ensure that all stakeholders in the tourism sector embrace the recommendations of the Master Plan and are involved in its implementation
- Strengthen Public Private Partnerships:
    - *Organise regular investment fairs*
    - *Invite private sector members from outside the sector*
    - *Encourage stakeholders from large tourism enterprises to participate in the Forum*
    - *Agree a work plan and budget for joint activities*
    - *Strengthen private sector associations*

- Garner the support of Traditional Rulers for tourism development at the local level
- Strengthen the Inter-Ministerial Committee

Product improvement and development strategy

- Develop each of the nine project that has been described in the profiles during the first 5-years of the 2013-2027 Plan:

    - *Elmina and surrounds*
    - *Kakum National Park*
    - *Kumasi traditional buildings and Yaa Asantewaa story*
    - *Kumasi craft villages*
    - *Mole National Park and surrounds*
    - *Volta Lake and surrounding attractions*
    - *Shai Hills Resource Reserve*
    - *Sekondi-Takoradi Urban Regeneration*
    - *The Eastern Region Route*

- Recruit consulting teams to carry out the scoping studies and formulate detailed integrated Master Plans for each area
- Identify funders and implement the plans
- Improve sightseeing in Ghana
    - *Build awareness of sightseeing opportunities in key international markets*
    - *Ensure attractions are 'elderly-friendly'*
    - *Adapt tours to market changes*
    - *Develop package tours for domestic tourists*
    - *Improve information dissemination*
    - *Improve interpretation*
    - *Improve and diversify theme-based tours*
    - *Improve the quality of tourism facilities and services*
    - *Train ground tour operators in international business practices*

  - *Arrange training for local tour operators*

- Develop city tourism in Ghana:
  - *Take tourism into consideration in town planning*
  - *Improve the quality of tourism facilities and services*
  - *Improve signage in the major cities*
  - *adopt proper numbering of houses and improve/street names and directions*
  - *Improve shopping opportunities by providing information about shopping centres, boutiques and markets*
  - *Increase entertainment opportunities*
  - *Provide information about city tours in hotels*
  - *Consider attracting investor(s) to set up a boutique hotel chain in various cities and townships around Ghana*
  - *Review the Parador Hotel Concept in Spain and Pousadas in Portugal, which could be adapted to Ghana (e.g. boutique hotels)*
  - *Develop 'living museum' cities*
  - *Improve information dissemination within the cities*

- Develop small FIT (Free Independent Travellers) group travel with a driver/guide
- Develop holiday and leisure resort tourism
- Develop tourism based on outdoor activities
- Develop special interest tourism
- Focus on events and festivals
- Focus on MICE tourism
- Create land banks to encourage product development and investment

Ghana tourism branding

- Apply the key brand elements consistently across all media and stakeholder channels
- Intensify brand promotion
- Manage and monitor collective brand application

Marketing strategy

- *Short-term (2013-2017) strategy:* Consolidation of current markets while attracting some special interest market segments
- *Medium-term (2018-2022) strategy:* Expanding to new international markets while still attracting the consolidated markets and the special interest markets
- *Long-term (2023-2027) strategy:* Further expansion of international market segments as well as special interest markets

- Promotion strategy: Launch a Public Relations (PR) campaign using press releases, information briefings, hosting travel and general feature journalists and TV film crews, celebrity endorsements (e.g. footballers) and publicity events

- Travel trade promotion strategy: Conduct advertising and promotion for the travel trade including familiarisation tours, trade shows/fairs, tour operator/travel agent presentations, tour operator support, and trade advertising. Organise:

  - *Familiarisation trips (fam tours) for travel trade representatives*
  - *Trade shows/fairs*
  - *Tour operator/travel agent presentations*
  - *Tour operator support*
  - *Trade advertising*

- Advertising and promotion strategy for the general public: Conduct advertising and promotion for the public. Develop:
  - *Collaterals*
  - *Videos*
  - *Social media*
  - *Website*
  - *Consumer advertising and direct mail*

- Public-private partnership: The public-private sector marketing working group should meet four times a year during the first five years of the strategy and twice a year in the medium and long-term

Economic performance of the tourism sector

- Projections (summary):

	2013	2017	2022	2027
GDP (USD billion)	40.3	54.8	143.4	220.6
Arrivals	993,600	1,454,700	2,451,300	4,320,000
Receipts (USD billions)	1.877	2,758	4.689	8.376
Spend per trip (US$)	1,512	1,725	2,075	2,592
Gross contribution to GDP (%)	4.7	5.0	5.2	5.7
Net contribution to GDP (%)	3.8	4.1	4.4	5.0
Fiscal contribution (millions)	204.9	391.9	885.3	2,008.3
Direct employment generated	91,000	139,000	236,000	403,000
Total employment generated (direct + indirect)	319,000	487,000	826,000	1,411,000
Income generation – direct + indirect (millions of USD)	286	435	738	1,261

Source: WDI, GSS, GTA, GIS, GRA and Consultant's calculation

- Enhancing economic benefits
  - *Increase tourists' stay and spending*
  - *Strengthen linkages in the supply and value chains*

- Facilitation of the investment process
  - *Raise awareness about investment opportunities*
  - *Provide investor guidance; identifying possible financial assistance where needed*

- *Promote a destination for tourism investment*

Improving the statistical system for tourism in Ghana

- Commit to developing and establishing the Tourism Satellite Account (TSA)
- Re-introduce the Inter-Institutional Committee on Tourism Statistics
- Re-establish GTA and GIS cooperation over the collection of tourist arrivals data
- Revise the entry/exit card
- Improve and harmonise data collection and analysis by GTA, Ghana Immigration Service, Ghana Statistical Services
- GTA to re-introduce the visitor expenditure survey at Katoka International Airport
- Review the operation of the Hotel Occupancy Rate Survey
- Develop and introduce a new monthly accommodation statistics survey
- Conduct household tourism expenditure surveys
- Conduct inbound and outbound tourism surveys
- Build capacity and train GTA statistics staff
- Sensitise the Tourism Statistics and Tourism Satellite Account Committee (TSTSAC) member organisations to tourism concepts and TSA
- Ensure compatibility of national accounts use of supply and use tables with the TSA
- Assist and train staff at MOT, Ghana Statistical Service (GSS), GTA and Bank of Ghana (BOG) in TSA procedures

Tourism human resource development in Ghana

- Develop policy on tourism human resource development for the public sector
- Improve public awareness on career opportunities in tourism
- Develop and implement targeted awareness creation
- Carry out a training needs assessment and evaluation of public sector tourism human capital
- Carry out training needs assessment and evaluation of private formal sector operators
- Establish a tourism human resource research unit
- Build human resource capacity at MOT, HOTCATT, GTDC and GTA
    - *Organise an orientation/induction programme*
    - *Develop management and technical programmes*

- Develop training programmes for the private formal sector
- Develop standardised hospitality and tourism training programmes
- Nationally accredit hospitality and tourism training programmes
- Develop the capacity of instructors in tourism training institutions by offering on-the-job training and off-site training to improve their teaching skills
- Establish national hospitality and tourism training institutes
    - *Establish a technical committee to oversee the establishment of the institutes and potential to set up more schools in the regions*
    - *Legally establish the institutes with an Act of parliament*
    - *Prepare new nationally accredited curricula to reflect the needs of the industry*
    - *Affiliate the schools with national and international institutions and agencies for exchange programmes and benchmarking*

- Create a technical committee with members selected from academia and industry to develop and implement guidelines that will promote stronger collaboration between academia and industry

Enhancing community involvement in the tourism sector and socio-cultural considerations

- Establish community tourism desks at MOT and GTA
- Absorbed Ghana Rural Ecotourism and Travel Office (GREET) into the GTA as an independent unit so that it has permanent Government support to continue its work
- Set up Destination Management Organisations (DMO) in Ghana's tourism zones
- Establish a funding mechanism to finance the staffing and activities of the DMO
- Intensify community involvement in tourism development projects in cultural tourism, nature and ecotourism, and adventure tourism
- Create partnerships to develop and market the creative industry (handicrafts, music and dance among others)
- Create partnerships with hotels and resorts to provide complementary services and products to tourists (i.e. the hotel provide rooms, food and beverage, the local community cover the excursions offered through the hotel), work together within the supply chain (local communities supply the hotels and resorts), exchange services (hotels and resorts offer educational programmes to local schools, the school children keep the beaches clean), and so on
- Encourage outsourcing to local farmers
- Promote local content in tourism architecture, design and furnishing
- Ensure that the inclusion of women, the youth and disadvantaged groups in the tourism sector is supported by Government policies and strategies
- Ensure that social protection legislation regulating the tourism sector extends to women, the youth and vulnerable groups

Environmental and cultural heritage protection and management

- Establish desks at MOT and GTA to address environmental issues related to tourism
    - *GTA Officers must work with the EPA to ensure that tourism enterprises operate in a sustainable manner, report the impact of their operation and are regularly inspected*
    - *GTA must work with MMDAs and Town and Country Planning to ensure that tourist areas are environmentally well maintained and that public waste management services are effective and efficient*

- Ministry staff must liaise with the Ministry of the Environment, Science and Technology (MEST) and with the seconded Officers from the Wildlife Division (WD), from Ghana Museum and Monuments Board (GMMB) on establishing environmental protection systems and on protecting cultural heritage assets
    - *Work with MEST to develop a set of indicators that will measure environmental impacts at tourism sites*
    - *Develop guidelines for establishing a visitor management system at each attraction and cultural heritage site that attracts large flows of tourists at certain times*

- Support the EPA and the MMDAs in stopping illegal mining, cutting of mangroves and sand winning
    - *Build community awareness about the importance of stopping illegal activities and the importance of keeping tourist areas clean and litter-free*

- Encourage the corporate social responsibility of large firms from other sectors to protect the environment and contribute to the tourism sector
    - *Conduct impact studies in tourism areas to identify the projects that are affecting tourism and the environment*
    - *Identify specific locations which are visited by tourists or have tourism potential in these areas to be designated as tourist sites by the Minister as prescribed in the Tourism Act 817*
    - *Approach these businesses and obtain their commitment to behave ethically and contribute to economic development by contributing to the tourism sector and improving the quality of life of the local community living in the area around the projects*
    - *Invite the businesses to regularly attend the Public Private Forum so that they are aware of developments in the sector and contribute their know-how and experience to the forum*

General recommendations

- Develop signage to tourist attractions around Ghana
- Create a series of view points in areas of natural beauty for tourists to admire
- Develop camp sites around Ghana

Chapter 6: The 5-Year immediate Action Plan

The Action Plan provides a road map to achieve the strategic objectives for the next five years. It gives an indication of the activities that are to be carried out, the timeframe in which they should be achieved, who should carry them out and how much they will cost. Where appropriate an indication of the likely cost of certain activities that are not covered through the project is provided with the institutions that should be responsible for these. However, at this stage of the process it was difficult to give an accurate cost for all the activities prescribed in the plan and in some cases it was impossible. Therefore, the costings that are presented in this action plan are indicative and will need to be verified and finalised in the second stage of the project.

The Action Plan offers a systematic basis for continued development of Ghana's tourism sector during the next five years, based on implementation of the recommendations in the Strategy. Projects and actions were selected to maintain a balance between tourism product development, marketing initiatives and institutional actions.

A substantial amount of development and consequent investment required is proposed within the five-year period by both the public and private sector. An objective of the Action Plan is to provide an enabling environment that is conducive to encouraging private sector initiatives.

Responsibilities for carrying out the recommendations of the project are presented in the Action Plan and the lead implementing agency is indicated by the symbol (i) and supporting and collaborating agencies by the symbol (ii). The creation of a Master Plan Permanent Implementation Task Force is recommended in this plan to oversee the activities prescribed in the Action Plan and to ensure that they are appropriately conducted within the time schedule and where applicable the budget indicated.

Acronyms used in the table are presented here as well as in the acronym list at the beginning of this document.

List of Acronyms used in the Action Plan

BOG	Bank of Ghana
COTVET	Council for Technical and Vocational Education and Training
DMO	Destination Management Organisation
Fam tour or trips	Familiarisation tour or trip
FC	Forestry Commission
FIT	Free Independent Traveller
GACL	Ghana Airports Company Limited
GHCT	Ghana Heritage Conservation Trust
GIS	Ghana Immigration Service
GIMPA	Ghana Institute of Management and Public Administration
GIPC	Ghana Investment Promotion Council
GMMB	Ghana Museums and Monuments Board
GNPC	Ghana National Petroleum Corporation
GRA	Ghana Revenue Authority
GREET	Ghana Rural Ecotourism and Travel Office
GSS	Ghana Statistical Service
GTA	Ghana Tourism Authority
GHATOF	Ghana Tourism Federation
GOG	Government of Ghana
HRD	Human Resource Development
ITDP	Integrated Tourism Development Programme
I-IP	Inter-Institutional Platform
KIA	Kotoka International Airport
MMDA	Metropolitan, Municipal and District Assemblies
MOE	Ministry of Education
MOF	Ministry of Finance
MORH	Ministry of Roads and Highways
MEST	Ministry of the Environment, Science and Technology
MOT	Ministry of Tourism
MOTr	Ministry of Transport
NAB	National Accreditation Board
NCTE	National Council for Tertiary Education
NDPC	National Development Planning Commission
NP	National Park
NTOCSB	National Tourism Occupational Classification and Standards Board
PPP	Public Private Partnership
TSA	Tourism Satellite Account
TSTSAC	Tourism Statistics and Tourism Satellite Account Committee
TCPD	Town and Country Planning Department
USD	US Dollars
VLTC	Volta Lake Transport Company
VRA	Volta River Authority
WD	Wildlife Division

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	TOURISM POLICY AND REGULATORY FRAMEWORK									
1	**Update and adapt the current tourism policy for official ratification**									Success criteria: The policy is formulated with stakeholders; cabinet and parliament ratifies the policy
	Organise two workshops with stakeholders to formulate the tourism policy		X					From existing budgets	(i) MOT (ii) GTA, private sector, other concerned agencies	Remark: the first workshop to brainstorm the document's format and which areas it should cover; the second to validate the document Success criteria: Events organised; a minimum of 30 participants at each workshop; stakeholder recommendations included in the minutes of the workshops; report on the workshops
	Review the policy with the Parliamentary Commission on Tourism, amend and present to Cabinet and to parliament for ratification; launch and publicise the new policy							From existing budgets	(i) MOT	Success criteria: policy reviewed and adopted; successful launch of the new policy
2	**Initiate a PR campaign aimed at high-level government officials and people of influence in Ghana to explain the value of the tourism sector and on the barriers hampering the development of tourism in Ghana**									Success criteria: the campaign succeeds in informing key institutions and people of influence about the value of tourism to the Ghana's economy

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										and society
	Organise an international conference to highlight the impact of tourism on the economy of selected countries - Topics would include: the importance of collecting accurate, comprehensive and frequent data • the need to develop a Tourism Satellite Account which will show the true value of the tourism sector to the economy of Ghana • the barriers that impede tourism development and deter tourists from visiting the country such as the strict visa regime and the high prices charged in the sector (flights and hotels) • the tremendous poverty reduction potential and livelihood options presented by the tourism sector • the importance of Public Private Partnerships in the development and management of tourism • the supply and value chain linkages		X					To be determin ed	(i) GTA, MOT (ii) universities	Remarks: Respected international speakers will present a series of additional and supporting relevant papers. The cost will depend on the number of international experts invited; air fares; duration of the conference; hire of the conference hall; size of expected participants The possibility of donor funding should be explored and proposals submitted to selected donors Universities which offer tourism courses such as GIMPA and Cap Coast should partner this initiative and could provide a venue, speakers and other logistics
	Hire a PR firm to develop a public relations campaign that publicises the conclusions of the conference and the work of tourism institutions involved in tourism development		X	X				To be determin ed	(i) MOT, GTA	Remarks: the selected firm will work with the PR sections at the Ministry and GTA to formulate a PR strategy on the back of the conclusions of the conference; encourage the media to publish the conclusions of the conference and keep briefing journalists to keep the issue at the forefront. Set up a website and a blog about the

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										on-going situation to stimulate discussion on the topic. Regularly present an update of public feeling to the relevant ministries; The campaign should run on and off over a period of two years to ensure that the messages stick; An impact monitoring system must be put in place; Financing could come from donors and from the Tourism Development Fund.
	Recruit an economist to draft an economic impact study presenting a cost/benefit analysis of the visa regime		X					18,500	(i) MOT	The tourism economist will travel to Ghana and spend approximately one month in the field collecting data and interviewing key informants. He/she will produce a report highlighting the revenue from visas and the lost direct and indirect revenue from tourists deterred from visiting the country. The findings of the report will be presented at the international conference and publicise though the PR campaign
3	**Review the wording in the Tourism Act 817 to ensure that there are no ambiguities and to ensure that all the functions of the GTA are clearly spelt out**		X						(i) MOT (ii) GTA	<u>Success criteria:</u> The Act is reworded to eliminate any possible misinterpretation and ambiguity and to fully describe all

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										the roles of the GTA A proposal to amend the Tourism Act should be submitted to the relevant authorities
4	**Involve the private sector in regulating and monitoring the sector**		**X**	**X**					(i) MOT	Success criteria: The private sector partners the GTA in monitoring and regulating quality in the sector with a future option of carrying out these role themselves A system to include the private sector in regulating and monitoring the quality of the sector should be discussed with the private sector; consideration should be given to entrust the private sector to administer the system
5	**Rethink the levy collection so that its collection is cost effective and efficient**	**X**	**X**						(i) GTA	Success criteria: an effective and efficient levy collection system This action will include coming up with a collection system which will not increase the size of the GTA dramatically and working out the size and type of tourism enterprise it is cost effective to collect from
	Agree a formula for the application of the Tourism Development Fund to the relevant tourism activities	**X**	**X**						(i) GTA	It is important that the GTA Board agree on the formula and that it is respected
	INSTITUTIONAL FRAMEWORK									

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
6	**Improve the functions and environment of the Ministry and GTA**									Success criteria: Directorates are strengthened, the working environment at the Ministry and GTA is improved
	Designate the MOT as a 'Technical Ministry'	X	X						(i) MOT	Appointment of key technical personnel, functions and outlook
	Appoint professional technical management at the GTA and keep the structure of GTA to a manageable size								(i) GTA	Management recruited will replace political appointees The number of district officers and levy collection staff is kept to a size that can be efficiently managed
	Improve the working environment at the Ministry and GTA		X	X	X				(i) MOT; GTA	HR Department to produce a guide on effective working environment and organise seminars for the staff of the Ministry and GTA If deemed necessary appoint a team building
	Build the capacity of Ministry and GTA staff		X	X	X	X	X		(i) MOT, GTA (ii) Universities	This is an on-going process and is covered in the HR section of this Action Plan
	Strengthen the MOT's monitoring and evaluation function and it PR, communications and information technology functions	X	X	X					(i) MOT	Appoint specialist staff
	Ensure the Master Plan is officially adopted and that it is fully implemented									Success criteria: the National Tourism Development Master Plan (2013-2027) is adopted as the guiding document for tourism development in Ghana and is fully implemented

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	Ensure that the Master Plan is legally adopted		**X**						(i) MOT	Present to Cabinet and Parliament for official ratification
	Create a permanent inter-agency task force to coordinate the implementation of the Master Plan	**X**	**X**						(i) MOT, GTA	The agency will report to the Minister and the Head of the GTA Board
	Strengthen Public Private Partnerships, Inter-Ministerial Committee and support from traditional rulers									<u>Success criteria:</u> the PPP forum meets regularly and joint initiatives are implemented; the Inter-Ministerial Committee meets regularly and take decisions to improve tourism development; traditional rulers fully support tourism development in their areas
	• Organise regular investment fairs • Invite private sector members from outside the sector • Encourage stakeholders from large tourism enterprises to participate in the Forum • Agree a work plan and budget for joint activities • Strengthen private sector associations	**X**	**X**	**X**	**X**	**X**	**X**		(i) MOT, GTA, other public sector agencies, the private sector, civil society	This is an on-going process
	Strengthen the Inter-Ministerial Committee	**X**	**X**	**X**	**X**	**X**	**X**		(i) MOT	This is an on-going process
	Garner support from traditional rules	**X**	**X**	**X**	**X**	**X**	**X**		(i) MOT, GTA	This is an on-going process
X.	**PLANNING AND DEVELOPMENT**									
	Lake Volta and surrounding area									**Success criteria:** TOR are produced, teams recruited, plans

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the terms of reference (TOR) for a scoping study to prepare an Integrated Tourism Master Plan for the Volta Lake and surrounding area		X					From existing budgets	(i) MOT (ii) VLTC, VRA, NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the scoping study		X						(i) MOT	An appropriate appointment should be made within three months
	Facilitate the consultants to carry out the scoping study, which should include a draft TOR for the appointment of consultants to carry out the Master Plan study for Volta Lake and surrounding area		X					To be determin ed	(i) MOT (ii) VLTC, VRA, GTA, MOTr, MOF, MORH, WD, FC, TCPD	The study should be concluded within one month by consultants or a consortium with expertise in land use planning, tourism planning, infrastructure planning and an economist
	Identify, select and appoint consultants to prepare the Master Plan study		X						(i) MOT	An appropriate appointment should be made within 3 months
	Facilitate the consultants to prepare the Integrated Tourism Master Plan for Volta Lake and surrounding area including a short, medium and long term action plan			X				To be determin ed	(i) MOT (ii) VLTC, VRA, GTA, MOTr, MOF, MORH, WD, FC, TCPD	The study should be concluded within three months by consultants or a consortium with expertise in land use planning, tourism planning, infrastructure planning, environmental studies and an economist
	Review short term action plan			X					(i) MOT	The review should be carried out

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										within two months
	Identify funders and implement as appropriate			X	X	X	X	To be determined	(i) MOT	The cost of implementation will be indicated by the Master Plan study. A separate budget will be drawn up and funders sought.
	Mole National Park and surrounding area									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the TOR for a study to prepare an Integrated Tourism Master Plan for the Mole National Park and surrounding area		X					From existing budgets	(i) MOT (ii) WD, NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the Master Plan study		X						(i) MOT	An appropriate appointment should be made within three months
	Facilitate the consultants to prepare the Integrated Tourism Master Plan for the Mole National Park and surrounding area including a short, medium and long term action plan		X					To be determined	(i) MOT (ii) WD, MOF, FC, GNPC	The study should be concluded within one month by consultants or a consortium with expertise in land use planning, tourism planning, landscape planning / environmental issues and an economist
	Review short term action plan		X							The review should be carried out within one month

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	Identify funders and implement as appropriate			X	X	X	X		(i) MOT (ii) MOF	The cost of implementation will be indicated by the Master Plan study. A separate budget will be drawn up and funders sought.
	Elmina castle, Fort Jago and Elmina town									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the TOR to review and update the management plan for Elmina Castle and Fort St. Jago		X					From existing budgets	(i) GMMB (ii) MOT, GHCT	The TOR should be formulated within one month
	Identify, select and appoint consultants to review and update the management plan		X						(i) GMMB (ii) MOT	An appropriate appointment should be made within three months
	Facilitate the consultants to review and update the management plan for Elmina Castle and Fort St. Jago		X					To be determin ed	(i) GMMB (ii) MOT, GHCT	The study should be concluded within one month by consultants or a consortium with expertise in heritage and conservation planning
	Produce the TOR to prepare an conservation management plan and strategic Master Plan for Elmina town as a whole		X					From exiting budgets	(i) MOT (ii) GMMB, GHCT, NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the conservation management plan and strategic Master Plan		X						(i) MOT	The appointment should be made

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
									(ii) GMMB, GHCT	within three months
	Facilitate the consultants to prepare the conservation management plan and strategic Master Plan including a short, medium and long term action plan		X					To be determin ed	(i) MOT (ii) GMMB, GHCT, Elmina District Assembly; NDPC	The study should be concluded within two months by consultants or a consortium with expertise in heritage and conservation planning a land use planner, social scientist/community liaison specialist, an infrastructure specialist and an economist
	Review short term action plan		X						(i) MOT	The review should be carried out within two months
	Identify funders and implement as appropriate			X	X	X	X	To be determin ed	(i) MOT (ii) MOF	The cost of implementation will be indicated by the Master Plan study. A separate budget will be drawn up and funders sought.
	Produce the TOR for a review of museum and interpretation within Elmina Castle, with recommendations on changes and proposals, to include activities and attractions to be incorporated into the castle and castle environs		X					From existing budgets	(i) GMMB (ii) MOT	The TOR should be produced within one month
	Identify, select and appoint consultants to prepare the review		X						(i) GMMB (ii) MOT	An appropriate appointment should be made within three months
	Facilitate the consultants to review the museum and interpretation		X					To be determin ed	(i) GMMB (ii) MOT	The study should be concluded within one month by consultants or a consortium with expertise in museum and heritage

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										interpretation
	Review recommendations		X							The review should be carried out within two months
	Identify funders and implement as appropriate			X	X	X	X	To be determin ed	(i) GMMB (ii) MOT, MOF	The cost of implementation will be indicated by the review. A separate budget will be drawn up and funders sought.
	Shai Hills Resource Reserve									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Prepare the TOR to review and update the management plan for the reserve		X					From existing budgets	(i) WD (ii) MOT, NDPC	The TOR should be prepared within one month
	Identify, select and appoint consultants to review and update the management plan for the reserve								(i) WD (ii) MOT	An appropriate appointment should be made within three months
	Facilitate the consultants to review and update the management plan for the reserve and highlight areas that are not being implemented. They must ensure that the scale of development to be provided is appropriate so that the natural character of the reserve is not diminished – limits should be set and larger scale accommodation and other facilities (i.e. conference halls) located on the		X					To be determin ed	(i) WD (ii) MOT, GTA	The study should be concluded within one month by consultants or a consortium with expertise in landscape planning, architecture and nature conservation

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	edge of the reserve. The plan should set out site specific guidelines to ensure that only appropriate development take place within the concessions areas									
	Following completion of the management review and update, develop designs for a simple structure in natural materials near the entrance of the reserve to provide shelter for briefings in case of bad weather and the construction of discrete hides within the reserve, using natural materials			X				To be determin ed	(i) WD (ii) GTA	The design should be completed within one month
	Appoint contractors to carry out the work			X					(i) WD (ii) GTA	An appropriate appointment should be made within two months
	Monitor progress on site of construction work through to successful completion			X				To be determin ed	(i) WD (ii) GTA	Construction should take no more than two months
	Identify the extent of damage to the existing boundary fence and prepare schedules and design specifications for the repair of the fence			X				To be determin ed	(i) WD (ii) GTA	Identification of the scope of works and the preparation of specifications should take no more than one month
	Appoint contractors to repair the fence around the perimeter of the reserve			X					(i) WD (ii) GTA	The appointment should be made within two months
	Monitor progress on site of construction work to repair the fence through to successful completion			X				To be determin ed	(i) WD (ii) GTA	Construction should take no more than two months
	Prepare schedules and design specifications for the upgrade of the roads within the reserve			X				To be determin	(i) WD	Preparing schedules and specifications should take no

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	with all weather surfaces							ed	(ii) GTA	more than one month
	Appoint contractors to carry out the work			X					(i) WD (ii) GTA	The appointment should be made within three months
	Monitor progress on site of construction work through to successful completion			X				To be determin ed	(i) WD (ii) GTA	Construction should take no more than six months
	Explore the potential of creating waterholes/dams or other attractive habitats where animals are likely to congregate to increase the potential for viewing by visitors and identify locations and scope of works			X				From existing budgets	(i) WD (ii) GTA	Establishing the scope of work should take no more than two months
	Prepare schedules and design specifications for the creation of the waterholes/dams			X				To be determin ed	(i) WD (ii) GTA	Identification and specifications should take no more than two month
	Appoint contractors for the creation of the waterholes/dams			X				To be determin ed	(i) WD (ii) GTA	The appointment should be made within three months
	Monitor progress on site of construction work through to successful completion			X				To be determin ed	(i) WD (ii) GTA	Construction should take no more than six months
	Establish and define the appropriate safety and medical equipment to provide first aid to visitors, especially rock climbers		X						(i) WD (ii) GTA, MOH	This should be carried out prior to any further potentially dangerous activities taking place on the site
	Purchase the appropriate safety and medical equipment to provide first aid to visitors, especially rock climbers, together with		X					To be determin	(i) WD	This should be carried out prior to any further potentially dangerous

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	appropriate storage facilities,							ed		activities taking place on the site
	Provide staff training to ensure the provision of first aid to visitors, especially rock climbers at all times when the park is open to visitors.		X					To be determined	(i) WD (ii) MOH	This should be carried out prior to any further potentially dangerous activities taking place on the site
	Formulate a coordinated and comprehensive signage strategy for the park to provide information and interpretation of all park resources and areas of interest. Outline information on each resource should be prepared including photographs, diagrams and text as necessary.			X				To be determined	(i) WD (ii) GTA, MOT	The signage strategy needs to be fully coordinated with the updated management plan to ensure that it reflects the full scope of activities and resources that the park is intending to offer.
	Appoint a graphic design team to produce the layouts for the signage boards together with the layout of a simple map and leaflet with site information				X			To be determined	(i) WD (ii) GTA	The appointment and completion of the work should be made within three months
	Appoint a signage manufacturer to produce the sign boards in robust materials				X			To be determined	(i) WD	The appointment should be made within three months
	Print copies of the map and information leaflet				X			To be determined	(i) WD, GTA	The information should be made available at the park entrance
	Install signage within the park				X			To be determined	(i) WD	
	Kumasi traditional buildings and the Yaa Asantewaa story									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										project is ready to be implemented
	Formulate the TOR for a management and conservation plan to ensure that the Asante traditional buildings are conserved and maintained				X			From existing budgets	(i) GMMB (ii) MOT, District Assembly, Local Chiefs, NDPC	The TOR should be formulated within two months
	Identify, select and appoint consultants to prepare the management plan				X				(i) GMMB (ii) MOT, GTA	The appointment should be made within three months
	Facilitate the consultants to prepare the management and conservation plan, which should include guidance on the restoration of all the UNESCO designated Asante shrines				X			To be determin ed	(i) GMMB (ii) MOT, District Assembly, Local Chiefs	The study should be concluded within three months by consultants or a consortium with expertise conservation and heritage management and restoration
	Following the production of the management and conservation plan, prepare specifications and bills of quantities for the restoration of the shrines				X			To be determin ed	(i) GMMB (ii) MOT, GTA	
	Appoint contractors to restore the shrines					X			(i) GMMB	The appointment should be made within three months
	Monitor the progress of the conservation work					X		To be determin ed	(i) GMMB (ii) MOT, GTA	
	Formulate the TOR for the rebuilding of the museum to Yaa Asantewaa in Ejisu including the site setting					X		From existing budgets	(i) GMMB (ii) MOT, GTA	The TOR should be formulated within two months

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	Appoint a design team to prepare a comprehensive design for the museum, site as a whole, and the interpretation and displays within the building					X		To be determined	(i) GMMB (ii) MOT, GTA	The appointment should be made within three months
	Facilitate the design team to prepare a comprehensive design for the museum, site as a whole, and the interpretation and displays within the building					X		To be determined	(i) GMMB (ii) MOT, GTA	
	Identify routes for different modes of transport where feasible (car, cycle, walking, public transport) to form tourist routes and circuits			X					(i) GTA (ii) MOTr, MOT, MORH	
	Integrated with the information on transport modes, formulate a coordinated and comprehensive signage strategy for the area to provide directional information and interpretation of all tourism resources and areas of interest. Directional signage should be used to guide the use of the tourist routes and circuits			X				To be determined	(i) GTA (ii) MOTr, MOT, MORH, GMMB, WD	
	Appoint a graphic design team to produce the layouts for the signage boards together with the layout of a simple map and leaflet with a summary of site information				X			To be determined	(i) GTA (ii) MOT	
	Appoint a signage manufacturer to produce the sign boards in robust materials				X			To be determined	(i) GTA (ii) MOT	
	Print copies of the map and information leaflet				X			To be determined	(i) GTA	The information should be distributed by GTA to be available in locations frequented by tourists

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	Install signage within the area				X			To be determin ed	(i) GTA (ii) MOTr, MOT, MORH, GMMB	It will be important to make regular checks to ensure that signs are not damaged or removed and remain legible and correctly positioned
	Kumasi craft villages									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the strategic marketing and branding project is ready to be implemented
	Produce the TOR to prepare a strategic marketing and branding plan for the Kumasi craft villages			X						The TOR should be formulated within one month <u>Benchmarks:</u> The following tasks should be included in the TOR: • reposition the function of the visitor information centres and interpretive facilities • build a sense of place and identity of each craft village • install signage for the • prepare a marketing strategy for each of the craft villages • prepare a branding and packaging strategy that clearly identify village craftsmen • Provide guidelines for developing a cooperative which will distribute crafts produced in the villages

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										• Create links to a wider national handicraft strategy • Formulate a distribution strategy
	Identify, select and appoint consultants to prepare the strategic marketing and branding plan for the Kumasi craft villages			X					(i) MOT, GTA (ii) District Assembly, GMMB	The appointment should be made within three months
	Facilitate the consultants to prepare the strategic marketing and branding plan for the Kumasi craft villages including a short, medium and long term action plan			X				To be determined	(i) MOT, GTA (ii) District Assembly, GMMB	The study should be concluded within four months by consultants or a consortium with expertise in marketing, branding, cultural heritage, heritage, social scientist/community liaison specialist, an infrastructure specialist for the signage component and an economist
	Review short term action plan			X					(i) MOT, GTA (ii) District Assembly, GMMB	The review should be carried out within two months
	Identify funders and implement as appropriate				X	X	X	To be determined	(i) MOT, GTA (ii) District Assembly, GMMB, MOF	The cost of implementation will be indicated by the Tourism Master Plan study. A separate budget will be drawn up and funders sought.
	Install signage within the area to each of the craft villages			X				To be determined	(i) GTA (ii) MOTr, MOT, MORH, GMMB	It will be important to make regular checks to ensure that signs are not damaged or removed and remain legible and correctly positioned

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	Sekondi urban regeneration									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the TOR to prepare a strategic and comprehensive Tourism Master Plan for Sekondi town as a whole, to include the conservation of heritage buildings and townscape, the establishment of a railway museum and the promotion of game fishing				X			From existing budgets	(i) MOT, GTA (ii) District Assembly, GMMB, NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the strategic Tourism Master Plan				X				(i) MOT, GTA (ii) District Assembly, GMMB	The appointment should be made within three months
	Facilitate the consultants to prepare the strategic Tourism Master Plan including a short, medium and long term action plan				X			To be determin ed	(i) MOT, GTA (ii) District Assembly, GMMB	The study should be concluded within four months by consultants or a consortium with expertise in tourism planning, marketing, land use planning, heritage and conservation, social scientist/community liaison specialist, an infrastructure specialist and an economist
	Review short term action plan				X				(i) MOT, GTA (ii) District Assembly, GMMB	The review should be carried out within two months

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	Identify funders and implement as appropriate					X	X	To be determin ed	(i) MOT, GTA (ii) District Assembly, GMMB, MOF	The cost of implementation will be indicated by the Tourism Master Plan study. A separate budget will be drawn up and funders sought.
	Kakum National Park									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the TOR for a study to prepare a comprehensive and integrated visitor management strategy and tourism Master Plan for Kakum National Park and surrounding area, to improve the visitor experience and extend the range of activities within the area		X					From existing budgets	(i) MOT,GTA ,WD (ii) NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the strategy and Master Plan study		X						(i) MOT, GTA (ii) WD	An appropriate appointment should be made within three months
	Facilitate the consultants to prepare the Integrated visitor management strategy and tourism Master Plan for the Kakum National Park and surrounding area including a short, medium and long term action plan		X					To be determin ed	(i) MOT, GTA, WD (ii) FC	The study should be concluded within two months by consultants or a consortium with expertise in land use planning, tourism planning, landscape planning / environmental issues, and marketing
	Review short term action plan		X						(i) MOT, GTA	The review should be carried out within one month

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
									(ii) WD, FC	
	Identify funders and implement as appropriate			X	X	X	X		(i) MOT, GTA (ii) WD, MOF, FC	The cost of implementation will be indicated by the Master Plan study. A separate budget will be drawn up and funders sought.
	The Eastern Route									**Success criteria:** TOR are produced, teams recruited, plans produced and funders identified **Benchmark:** the development project is ready to be implemented
	Produce the TOR for a study to prepare a tourism development plan encompassing several sites along the route (such as Aburi Botanical Gardens, Tetteh Quarshie Cocoa Farm, the Bunso Arboretum, and Kwahu Ridge paragliding site and viewpoint) to improve the visitor experience and extend the range of activities within the area		X					From existing budgets	(i) MOT, MOT (ii) District Assemblies, NDPC	The TOR should be formulated within one month
	Identify, select and appoint consultants to prepare the strategy and development plan study		X						(i) MOT (ii) District Assemblies	An appropriate appointment should be made within three months
	Facilitate the consultants to prepare the Integrated visitor management strategy and tourism development plan for Eastern Route including a short, medium and long term action plan		X					To be determin ed	(i) MOT, MOT (ii) District Assemblies	The study should be concluded within two months by consultants or a consortium with expertise in land use planning, tourism planning, landscape planning / environmental issues, and

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										marketing
	Review short term action plan		X						(i) MOT, MOT (ii) District Assemblies	The review should be carried out within one month
	Identify funders and implement as appropriate			X	X	X	X		(i) MOT, MOT (ii) District Assemblies	The cost of implementation will be indicated by the tourism development plan study. A separate budget will be drawn up and funders sought.
X.	**BRANDING**									
	Public-private sector cooperation in branding									
	Establish and manage the tourism branding workgroup	X	X	X	X	X	X	5,000	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector (iv) Private sector assoc. (supporting agencies)	Success criteria: all important stakeholders actively participating in the brand workgroup Benchmarks: Brand workgroup meets at least 4 x p.a. Remarks: Workgroup to consist of key public and private sector representatives
	Secure regulations to require branding and obtain endorsements and commitment from all stakeholders to use the brand	X	X	X	X	X	X	-	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector (iv) Private sector	Success criteria: all important stakeholders actively using the brand Benchmarks: at least 60% of tourism operators using the brand after three years

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
									assoc. (supporting agencies)	Remarks: Conduct intensive industry communications drive to instil the brand among all tourism institutions and businesses
	Brand promotion									
	Formulate a brand promotion plan	x						30,000	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector (iv) Private sector assoc. (supporting agencies)	Success criteria: Brand communication plan incorporated in budgets and business plans of tourism institutions Benchmarks: Brand communication plan adopted by workgroup and key stakeholders Remarks: The brand communication plan should be closely aligned with the overall marketing plan as well as actions of counterparts such as Brand Ghana
	Secure funding for special brand promotion initiatives.	x	x	x	x	x	x	As per plan	(i) GTA (lead) (ii) Ministry of Tourism	Success criteria: brand promotion plan funded Benchmarks: an appropriate portion of the 1% levy allocated to brand promotion
	Apply the brand on existing tourism initiatives and materials, both public and private sectors	x	x	x	x	x	x	25,000	(i) GTA (lead) (ii) Ministry of	Success criteria: brand applied to all official marketing materials

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
									Tourism (iii) Private sector (iv) Private sector assoc. (supporting agencies)	Benchmarks: at least 60% of tourism operators applying the brand after three years Remarks: brand application should be approved by GTA
	Improve online resources (see marketing) and apply the brand in web and social media marketing		X	X	X	X	X	40,000	(i) GTA (lead) (v) Ministry of Tourism (vi) Private sector (vii) Private sector assoc. (supporting agencies)	Success criteria: Brand adequately reflected on all online channels Benchmarks: user participation (unique users, page views, likes, etc.) to reflect increased usage Remarks: The website and Facebook pages should be redesigned to reflect the brand and only one website address should be used
	Apply the brand to the corporate imagery of the Ministry, GTA and other organizations (offices, stationary, vehicles, etc.)		X	X	X	X	X	15,000	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector assoc. (supporting agencies)	Success criteria: brand applied to all corporate images of official tourism bodies Benchmarks: brand highly visible in official tourism organisations Remarks: brand application should be approved by GTA
	Brand the major tourism sites and attractions with welcoming and interpretive brand signage		X	X	X	X	X	100,000	(i) GTA (lead) Ministry of Tourism	Success criteria: welcoming and interpretive signage applied at all major tourism sites

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										Benchmarks: at least 60% of tourism sites properly branded after three years Remarks: Close cooperation will be required with Ministry of Culture, the Wildlife Authority and others brand
	Launch a major domestic tourism promotion drive to infuse the brand values and a leisure travel culture among Ghanaians		X	X	X	X	X	300,000 p.a. = 1,500, 000	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector (iv) Private sector assoc. (supporting agencies)	Success criteria: domestic leisure travel increases substantially and tourism brand recognition is high among Ghanaians Benchmarks: Domestic leisure travel increases by at least 15% per annum Remarks: Integrate with overall marketing strategy. Could include radio and print advertising, a travel program on local television, a PR drive, social media communications, etc. Such campaign should ideally be based on special price offers for Ghanaian families and expat residents, especially over weekends
	Launch regional brand promotion program			X	X	X	X	50,000 p.a. = 200,000	(i) GTA (lead) (ii) Private sector (iii) Private sector assoc. (supporting	Success criteria: Arrivals from ECOWAS increase substantially and tourism brand recognition is high among ECOWAS travellers Benchmarks: Leisure travel from ECOWAS increases by at least

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
									agencies)	10% per annum Remarks: promote leisure travel packages working with travel agents in Nigeria and other neighbouring countries and backing it with a media hosting program for regional travel journalist
	Strike formal agreements with key international tour operators to apply and promote the brand		X	X	X	X	X	10 @ 50,000 = 500 000	(i) GTA (lead)	Success criteria: Tour operator knowledge of Ghana increased substantially and branding adopted and promoted by major international tour operators Benchmarks: At least 10 Joint Marketing Agreements concluded with tour operators in key markets Remarks: agreement to include special Ghana offers, co-branding, etc.
	Take the tourism brand international through an above-the-line external television, print and online communication campaign				X	X	X	5 mil p.a. = 15 mil (special budget allocation)	(i) GTA (lead) (ii) Ministry of Tourism (iii) Private sector (iv) Private sector assoc. (supporting agencies)	Success criteria: the tourism brand is recognised and acknowledged by the majority of potential long-haul, experiential travellers in the world Benchmarks: Ghana's tourism brand recognition among all international travellers increase substantially The feasibility of such a campaign will depend on finance availability.

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										It could include: International television advertising A major program for hosting international travel media and journalists and educating them on the brand characteristics A major travel trade partnership program including joint marketing agreements and travel trade famliarisation visits An innovative online marketing drive
	Brand management									
	Lay down and communicate guidelines for brand usage and communicate the brand manual	X							(i) GTA (lead) (ii) Private sector assoc. (supporting agencies)	Success criteria: the brand is consistently applied without deviations Benchmarks: There is at least 90% compliance with the brand guidelines
	Set up dedicated brand management mandate in GTA	X	X					Salaries & admin	GTA (lead)	Success criteria: a brand management unit and dedicated position of brand manager has been created in filled in GTA Benchmarks: There is at least 90% compliance with the brand guidelines

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
X.	**MARKETING**									
	Public-private sector working group									
	Set up public-private sector working group		X	X	X	X	X	5,000	(i) GTA (lead) (ii) MOT, Private sector, Private sector associations (supporting agencies)	Remarks: Once the public-private sector working group has been established, it will be the main body to evaluate joint marketing actions. Success criteria: joint marketing action plan and roles and responsibilities agreed; four meetings conducted per year during the first five-year period; marketing action plan evaluated and revised based on the market research results.
	Market research									
	Conduct annual exit surveys among international visitors		X	X	X	X	X	150,000	(i) GSS (lead) (ii) GTA, MOT, GIS (supporting agencies)	Remarks: Ghana Statistical Services have the system in place; they have already trained people to collect the data. Success criteria: Timely publication of the market research report annually
	Conduct domestic market research in conjunction with the Ghana Living Standard Survey (minimum in five year intervals; preferably in three year intervals)		X			X		50,000	(i) GSS (lead) (ii) GTA, MOT, GIS (supporting agencies)	Remarks: Ghana Statistical Services have the system in place; they have already trained people to collect the data; living standard survey is collected periodically – not annually Success criteria: Timely publication of the domestic

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										market research – need to be published separately as compiling the full report based on Living Standard Survey will take too much time
	Promotional tools and materials – public									
	(i) Collaterals									
	Develop a photo bank		X				X	20,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer)	Remarks: The photo bank should be included in the official website and there under the travel trade/media section. A professional photographer should be contracted to take professional photos supporting the brand values and messages. This way Ghana can also manage its brand strategy implementation and protect it. Photos need to be added in conjunction with the product development. Success criteria: photo bank established in the website; photos used by media and travel trade
	Develop and update destination information booklet		X		X		X	150,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer)	Remarks: The booklet/brochures should be developed as per the branding strategy to support the brand management and values. Needs to be revised and updated on a regular basis; could be enlarged into a sale manual for the travel trade (electronic version). Should include

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										advertising from the private sector to generate funds. Success criteria: copies of the booklet produced; distribution strategy established and implemented; an electronic version included on the website
	Develop a PR pack in shell folder format		X		X		X	10,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer)	Remarks: This is to be used as a press pack for the media, travel writers, and travel trade fam tour participants. To start with an electronic version, which can be distributed by flash drive and website (travel trade/media section). Ultimately a hard copy should be published. Success criteria: electronic version produced
	Develop postcards		X				X	10,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer	Remarks: Use the photos in the photo bank as these have been taken for the the branding strategy. The electronic photos can be used in social media. Success criteria: variety of postcards printed and published; photos used to support the messages in social media
	Develop posters of sites, activities		X				X	50,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer	Remarks: posters should be exhibited at places where international FIT travellers and well as targeted domestic market segments will see them Success criteria: posters on the themes printed; posters seen in Accra, Kumasi and Cape Coast;

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										at the airport; offices of the travel trade featuring Ghana.
	Develop 'Stay Another Day in Ghana' brochure			X				80,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer	Remarks: develop as described in the document; distribute to the accommodation establishments and restaurants preferred by the targeted domestic market segment and international FIT travellers; include info on the website with links to expat clubs' websites. Success criteria: brochures designed and printed; distributed to major accommodation establishments in Accra, Kumasi, Cape Coast; at the airport; information included in the website
	(i) Videos									
	Develop and produce a new short video based on the branding guidelines		X					50,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer	Remarks: introduce Ghana as a place where tourists can share the rhythm of Ghanaians Success criteria: video produced; video included into the website and YouTube; video used at trade fairs and trade presentations as well as press conferences
	Develop short specialised videos on a) city breaks, b) festivals, c) soft adventures		X	X				50,000	(i) Public-private working group (lead/evaluator) (ii) GTA (lead implementer	Remarks: a video on city breaks should be produced during year 1 as it will be used for targeting the neighbouring markets; videos on festivals and soft adventures can wait until year 2. Success criteria: video produced;

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										video included on the website and. YouTube; video used at trade fairs and trade presentations as well as press conferences in the relevant markets as described in the marketing strategy
	(iii) Social media									
	Encourage private sector tourism operators to adopt social media technologies		X		X		X	30,000	(i) Public-private working group (lead/evaluator) (ii) Private sector associations as lead implementers (Ghana tour operators association; Ghana hotel association) to encourage their members to adopt social media technologies; Private sector (adopting the social media technologies)	<u>Remarks:</u> introduce Ghana as a place where tourists can share the rhythm of Ghanaians. GTA and associations could arrange joint training sessions on social media for the private sector. <u>Success criteria:</u> video produced; video included on the website and YouTube; video used at trade fairs and trade presentations as well as press conferences
	(iv) Website									
	Upgrade the website as prescribed in the branding strategy and developments		X	X	X	X	X	Budget incl. in branding action	(i) GTA (lead) (ii) Public-private working group (evaluator)	<u>Remarks:</u> Ghana should only have one official tourism website. The website should adopt the branding strategy and follow the

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
								plan		customer journey approach. It is also recommended to develop a specific section for the travel trade and the media. This should include a photo bank, training packages, and press releases. The website should be kept up-to-date – therefore actions are required annually. Success criteria: website upgraded; travel trade and media section set up and info distributed to the travel trade in Ghana and in the key source markets.
	(v) Direct mail									
	Obtain membership lists from targeted societies, clubs and associations; set up links from the official website to the associations' website; arrange specific presentations to their members. Provide press releases on the specific topics to the journals, newsletters and e-newsletters of these bodies as well as magazines and other media aimed at the target segments		X	X	X	X	X	50,000	(i) GTA (lead) (ii) Public-private working group (evaluator)	Remarks: targeted marketing for special interest groups; for expats; for overseas Ghanaians who can be reached through these specific clubs and associations Success criteria: linkages established from club websites to Ghana websites; articles published in specialised magazines and membership newsletters
	Advertising and promotion – for the travel trade									

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	(i) Fam trips/tours									
	Organise fam trips for local tour operators and journalists in Ghana		X		X		X	30,000 public contribu-tion	(i) Public-private working group (lead) (ii) Private sector associations and the Ministry of Tourism as supporters (ii) Private sector (to contribute in kind e.g. free room and board, transport, excursions	Remarks: local tour operators should be kept well informed about the developments around the country as they already have contacts with international travel trade and they are, in many cases, the first point of call for more accurate information. Tour operators and journalists from the neighbouring countries should be invited as recommended in the marketing strategy. Success criteria: linkages established with travel trade and media; press articles in the selected newspapers and magazines; Ghana feature in the portfolio of new travel trade partners in the target countries.
	Organise fam trips for tour operators and journalists from the neighbouring countries		X	X		X		50,000 public contribu-tion		
	Organise fam trips for tour operators and journalists from Europe and North America				X		X	50,000 public contribu-tion		
	(ii) Trade shows/fairs									
	Akwaaba, Nigeria		X	X	X	X	X	250,000	(i) Public-private working group (lead/evaluator (i) GTA (lead coordinator) (i) Private sector (implementing agencies) (ii) Ministry of Tourism	Remarks: during the first five-year period emphasis should be given to the two major trade fairs in Europe, trade fairs in the neighbouring countries. From third year onwards presentation should be organised in the US, Scandinavia and the Netherlands. Representation at the fairs should coincide with the marketing
	World Travel Market (WTM), UK		X	X	X	X	X	1,500,000		
	International Tourismus-Börse (ITB), Germany		X	X	X	X	X	1,000,000		
	Fair in Scandinavia (MATKO in Helsinki, Finland or TUR in Gothenburg, Sweden)				X	X	X	450,000		
	Vakatienburs, the Netherlands				X	X	X	450 000		

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	Fair in the US				X	X	X	1,500,000	(supporting agency)	strategy. Presentations to the travel trade connected with trade shows. Later, presentations and road shows should be separated from trade fairs. Cost represents the total for the 5-year period. <u>Success criteria:</u> objectives for each trade fair representation set up at the public-private working group; results evaluated – immediate and six months after the fair
	Tour operator support									
	Develop a database of key travel trade representatives in the target markets		X						(i) GTA (lead) (ii) Public-private working group (supporting agency; evaluator) (ii) Ministry of Tourism (supporting agency)	<u>Remarks:</u> These activities are connected with the development of collaterals. <u>Success criteria:</u> database established; support provided; new travel trade featuring Ghana in their portfolios
	Make the electronic and printed materials including videos available for the selected travel trade; provide access to the travel trade/media section of the Ghana website; update annually		X	X	X	X	X			
	Organise a system to respond to the travel trade's requests and proposals		X							
	Develop internet based training for key travel trade sales persons			X				30,000		
	Implement the training with key travel trade sales persons; renew the trainings at regular intervals				X	X	X	30,000		
	Public relations campaign									
	Intensify public awareness about tourism in Ghana by a) agreeing with the local press to have regular travel supplements/articles about the benefits of tourism, new destinations and		X	X	X	X	X	Included in branding action	(i) GTA (lead) (ii) Public-private working group (supporting	<u>Remarks:</u> These activities are connected with the development of collaterals (press/media kit; photo databank; videos etc.).

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	experiences in Ghana for domestic travellers and b) travel documentaries on local radio and TV-channels							plan	agency; evaluator); Ministry of Tourism (supporting agency)	Success criteria: The public-private working group should set up the criteria for success – how many articles, in which newspapers, radio and TV-channels.
	Representation in key source markets									
	Contract an agency to represent Ghana in UK (London) and USA (Atlanta) – budget calculated based on 5 month work per year			**X UK**	**X US**	**X**	**X**	560,000	(i) GTA (lead) (ii) Public-private working group (supporting agency; involved in preparing the terms of reference for the agency for specific projects/tasks and in evaluating the results)	Remarks: Requires well managed and directed operations with the agency. First contract with UK based agency followed by a contract with US-based agency. PR-fees included in the budget. Operational budget need to be set up when the projects/ PR-campaigns are designed jointly in the public-private working group. Success criteria: The terms of reference developed and agreed with the public-private working group; specific projects to work with the agency designed; success criteria set up; results evaluated on an annual basis.
X.	**ECONOMIC IMPACT OF THE TOURISM SECTOR**									
	Sensitisation workshop on the 2013-2027 Plan and economic impact of tourism on the economy.		**X**					1,200 (transport allowance renting of facilities and	(i) MOT, GTA	Number of participants and extent of interaction on successful implementation. Target Participants: Representatives from MFEP, BOG, GIPC, GIS, GSS, Industry Players and

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
								refreshme nts).		relevant NGOs in tourism etc. Expected number of attendees = 40
	Formation of Plan Implementation Committee (PIC) to monitor the Plan and assess its economic impact annually. Advocate and push for domestic tourism development.		X	X	X	X	X		(i) MOT, MFEP, GTA, GIS, BOG, GIPC, GSS	Establishing the *Modus Operandi* of Committee and criteria for assessment. Lobby for greater budgetary allocations from Government for tourism development. Create a rapport with the private sector to enhance performance in the industry.
	Mid-term mini-survey to monitor performance trends of selected destination areas, hotels, GIS, GTA data on tourists.				X			To depend on TOR of Consultant .	(i) MOT, GTA, Consultant	Survey outcomes for dissemination to policy makers and industry players for appropriate action on tourism development.
	Terminal year of Immediate 5-Year Plan assessment to determine Plan achievements in light of policy recommendations						X		(i) MOT (ii) FEP GTA, PIC, BOG	Achievement/deviation from targets/projections. Data and information obtained to fine-tune the next 5-year Plan (2018-2022).
X.	**STATISTICS AND INFORMATION MANAGEMENT**									
	Re-introduce the Inter-Institutional Platform (I-IP) and the Tourism Statistics and Tourism Satellite Account Committee (TSTSAC)		X	X	X	X	X		(i) GSS, GTA, MOT, GIS, MOF and BOG (collective responsibility)	I-IP established with a Steering Committee and TSTSAC to ensure introduction of strengthened system of tourism statistics and development of TSA
	Ghana Tourism Authority (GTA) and Ghana Immigration Service (GIS) re-establish cooperation over international tourist arrivals data		X						(i) GTA and GIS (joint responsibility)	Working relationship re-established, data collection problems resolved and international standards of arrivals data collected , analysed and published

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
	Revision of the international visitor entry/exit card		X					From existing budgets	(i) GIS and GTA	A new entry/exit card designed and agreed between GIS and GTA is produced and introduced
	Improved data collection by Border Officials assisted through a training programme		X	X	X	X	X	From existing budgets	(i) GTA and GIS	Annual training programme or seminar introduced for serving border officials and other GIS staff
	Re-introduction of the International Visitor Expenditure Survey at Kotoka I'ntl Airport		X	X	X	X	X	From existing budgets	(i) GTA and GACL	Re-commencement of the survey at the airport, data collected, analysed and published
	Review the operation of the Hotel Occupancy Rate Survey and integrate with Tourism Levy questionnaire		X					From existing budgets	GTA	Review conducted and survey integrated into the Tourism Levy questionnaire or new programme of hotelier training introduced, improved response rates achieved and data analysed and published
	Develop and introduce a new monthly accommodation statistics survey		X	X	X	X	X	150,000	(i) GSS and (ii) GTA (joint responsibility but led by GSS with Int'l Tech Assist)	Design and implementation with a hotelier training programme, of a new monthly accommodation survey, improved response rates achieved and data analysed and published
	Conduct the household tourism expenditure survey		X					75,000	GSS with Int'l Tech Assist	Survey conducted and data analysed and published
	Develop and conduct a new annual Inbound and Outbound Survey		X	X	X	X	X	150,000	(i) GSS and (i) GIS with Int'l Tech Assist and support from (ii) GTA	Design and implementation of a new annual Inbound and Outbound Survey whose data is analysed and published
	Capacity building and training of GTA statistics staff in data handling, analysis, reporting, and UNWTO methodology		X	X				35,000	GTA with Int'l Tech Assist	Delivery of training seminars and workshops, the production of more timely data and publication of new analysis and reports

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
	Training of TSTSAC member representatives in tourism concepts , UNWTO and TSA methodology		X	X				35,000	TSTSAC members with Int'l Tech Assist	Delivery of training seminars and workshops
	Establishing compatibility of Supply and Use Tables used by GSS/National Accounts with the UNWTO TSA methodology		X			X		20,000	GSS and GTA with Int'l Tech Assist	Identify the degree of compatibility/incompatibility and propose any solutions needed
	Assistance and training with compilation of the TSA Tables					X		35,000	GSS, GTA and BOG with Int'l Tech Assist	Conduct training course/seminars in compilation and completion of the TSA data tables needed to prepare the final analysis and outputs.
X.	**HUMAN RESOURCE DEVELOPMENT** ***(NB: Costs will be dependent on proposals submitted to undertake the various projects)***									
	Public sector									
	HRD gap identification		X						(i) MOT (ii) GTA, HOTCATT	Success criteria: Consultants engaged to assess and evaluate all existing staff of MOT, GTA and HOTCATT; gaps identified between their job descriptions, job specifications and actual performance Creation of a Human Resource Database for MOT and GTA created to facilitate quality human resource decision-making process Benchmarks • Draw Terms of Reference • Hire Consultants- Feb 2013 • Carry out assessment and evaluation by June to Aug 2013

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										• Submission of report – Nov 2013 • Review report, accept and implement recommendations Remarks: Funding limitations should be addressed and consultants hired to carry out task
	Develop strategic human resource plan		X						(i) MOT (ii) HOTCATT, GTDC, GTA	Success criteria: Strategic human resource plan developed from the report on HRD gap Identification in MOT, HOTCATT, GTDC and GTA Benchmarks • Draw Terms of Reference • Hire Consultants- Nov 2013 • Submission of strategic human resource plan for MOT, HOTCATT, GTDC and GTA June 2014. • Funding sourced to implement programme/plan Remarks: Funding limitations should be addressed and consultants hired to carry out task
	Develop appropriate training and development programmes for existing and new staff			X					(i) MOT	Success criteria: Appropriate training and development programmes developed for existing and new staff

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										<u>Benchmarks</u> • Develop training programmes – June to Aug 2014 • Develop training plans - June to Aug 2014 • Funding sourced to implement plans/programme <u>Remarks:</u> Funding limitations should be addressed and Consultants hired to carry out task
	Train existing and new staff			X	X	X	X		(i) MOT (i) HOTCATT, GTDC, GTA	<u>Success criteria:</u> Existing and new staff trained based on approved training programmes and plans <u>Benchmarks</u> A training plan based on the approved training programmes developed and implemented from Sept 2014 Trainer-of-trainers programme developed and implemented- Sept 2014 <u>Remarks:</u> Programme should be phased out and targeted at the right staff and should cover all regions
	Develop a strategic human resource policy		X	X					(i) Ministry of Tourism (ii) HOTCATT,	<u>Success criteria:</u> Strategic human resource policy Developed and published on • Standard • procedures and guidelines for human resource management

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
									GTDC, GTA	• Manpower planning • Recruitment and selection • Orientation, training and development • Performance management • Performance based reward systems • Redundancies and separations Benchmarks Policy document developed and published – Jan –June 2013 Remarks: Funding limitations should be addressed and consultants engage to carry out exercise.
	Conduct Orientation/Induction programme for existing and new staff on the strategic human resource policy		X	X	X	X	X		(i) MOT (ii) HOTCATT, GTDC, GTA	Success criteria: Orientation and induction conducted for all staff in the areas below: • Standard procedures and guidelines for human resource management • Manpower planning • Recruitment and selection • Orientation, training and development • Performance management • Performance based reward systems • Redundancies and separations Benchmarks Orientation and induction starts in July 2013

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										Remarks: Programme should be phased out and cover all staff of MOT, HOTCATT, GTDC and GTA Selected staff of MOT and GTA should be involved to ensure continuity
	Developed strategic HRD training programmes			X	X	X	X			Success criteria: Short- term modular courses and tailored regular advanced level management and technical programmes developed in collaboration with existing tertiary training institutions in Ghana, such as the University of Ghana, University of Cape Coast and Ghana Institute of Management and Public Administration (GIMPA) Benchmarks Approved strategic training programme developed and published by June 2014 Remarks: • Programmes should be developed in collaboration with all stakeholders Programmes should be part of career progression criteria
	Build capacity at MOT, HOTCATT, GTDC and GTA			X	X	X	X		(i) MOT	Success criteria: • A competent management core workforce for the Ministry and

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
									(ii) HOTCATT, GTDC, GTA	its agencies • Strengthened technical and managerial capabilities of public sector tourism officials through Intensive in-country training programmes in tourism planning, tourism marketing, tourism project appraisal and hotel inspection and classification, tour and travel operations and management and tour guiding Benchmarks • Training of staff should start from July 2014 and should be continuous • Training should cover all staff in all regions. • Training plan will indicated the numbers to be trained at any particular time. Remarks: Training budget for MOT, HOTCATT, GTDC and GTA should be consolidated to achieve this objective
	Establish a tourism human resource research unit GIMPA		X							Success criteria: A research Unit established and resourced appropriately Benchmarks framework for establishment of

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										unit • developed by March 2013 • Unit established and resourced June 2013 Remarks: Unit should be manned by technically competent and experienced staff from academia and industry
	Develop standardised hospitality and tourism training programmes		X						(i) GHATOF, MOT, GTB, GTDC, COTVET, NCTE, NAB, National Tourism Occupational Classification & Standards Board (NTOCSB)	Success criteria: Training Standards developed and published Benchmarks • Form a technical team to Collect, collate and review existing standards- June 2013 • Develop standard modules for all areas of tourism • Test run modules • Train assessors/validators to monitor implementation of standards by institutions Remarks: Funding limitations should be addressed and MOT should give the needed strategic direction for project success
	Nationally accredit hospitality and tourism training programmes			X					(i) Tourism accreditation	Success criteria: Accredited hospitality and tourism training programmes established and used by training Institutions Benchmarks

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
									body	• Criteria for accreditation developed • Communicate criteria to training Institutions • Organise sensitisation workshops on accreditation criteria • Set deadlines for compliance monitor and evaluate implementation
	Private Sector									
	Awareness Creation on staff training and development		X	X	X	X	X		(i) GHATOF, MOT	Success criteria: Increased awareness level of tourism stakeholders in the private sector, particularly SMEs on the important role they play in the development of the tourism industry and the necessity to train and develop their staff to deliver quality services that meet international standards Benchmarks Sensitisation programmes organised on continuous basis for all private sector tourism stakeholders Remarks: Continuous evaluation of programme to assess its impact.
	Training Needs Assessment of the formal and informal sectors		X	X	X	X	X		(i) GHATOF, MOT	Success criteria: Consultants engaged to assess and evaluate all existing staff of

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
										enterprises in the formal and informal sectors. Shortfalls in the competencies of the workforce assessed and strategies developed to overcome them. Benchmarks • Draw Terms of Reference • Hire Consultants- Feb 2013 • Carry out assessment and evaluation by June to Aug 2013 • Submission of report – Nov 2013 • Review report, accept and implement recommendations Remarks: Funding limitations should be addressed and consultants hired to carry out exercise
	Development of Training programmes			X					(i) GHATOF, MOT, Training institutions	Success criteria: Appropriate training programmes developed for the formal and informal sector workforce based on outcomes of TNA Benchmarks Engage consultants to develop training programmes March 2014 Training programmes developed by Sept. 2014 Remarks:

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										Training programmes validated by industry
	Develop the capacity of Instructors in tourism training institutions by offering on-the-job training as well as off-site training to improve their teaching skills		X						**(i)** MOT GHATOF	***Success criteria:*** Capacity of Instructors in tourism training institutions improved. ***Benchmarks*** • Consultants engaged to assess and evaluate all existing Instructors in tourism training institutions • Training materials developed to addressed gaps • Creation of database of tourism instructors. • 200 instructors trained each year in batches of 25 across all regions
	National Hospitality and Tourism Training School									
	Establishment of National Hospitality and Tourism Training School		X	X	X	X	X		(i) MOT, GHATOF, MOE, COTVET, NCTE	Success criteria: • Establish a technical committee to oversee the establishment of the school • Legally establish the school with an Act of parliament • Nationally accredited curricula to reflect the needs of the industry adopted and used by school • Affiliate with national and international institutions and

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										agencies for exchange programmes and benchmarking Benchmarks National Hospitality and Tourism School established by 2014 Remarks: Funding limitations should be addressed and appropriate political and technical support given to establish school
	Linkage between academia and the tourism and the industry		X						(i) MOT Academic Institutions offering Hospitality and Tourism programmes	Success criteria: Formal link established between academia and industry Benchmarks • Draw Terms of Reference • Setup a technical team to develop modalities - Feb 2013 • Submission of report – Nov 2013 • Review report, accept and implement recommendations
X.	**ENVIRONMENTAL ISSUES**									
	Establish desks at MOT and GTA to deal with environmental and cultural issues		X						(i) MOT, GTA	Success criteria: desk established and officer working with counterpart in the respective Ministry
	Work with MEST to develop a set of indicators that will measure environmental impacts at tourism sites		X	X	X	X	X		(i) MOT, MEST, EPA	Success criteria: a set of indicators are developed for each environmentally and culturally sensitive tourist site in Ghana and applied to take policy and

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										operational decisions <u>Benchmarks</u> • Consultants are recruited to identify the set of indicators required for each site and set the measurements criteria • A system is established for regular monitoring using the indicators • Results are recorded and compared over time and against other sites <u>Remarks:</u> This project should be carried out over the first three years to cover all the tourism sites. The sites should be monitored on an on-going basis Costing could come from various source: Government (both MOT and MEST budgets); donors; tax on entrance fees
	Develop guidelines for establishing a visitor management system at each attraction and cultural heritage site that attracts large flows of tourists at certain times		X						(i) GTA; GMMB; WD	<u>Success criteria:</u> Guidelines established and limits set and applied at tourism sites <u>Remarks:</u> The Minister can invoke Article 45 of the Tourism Act 817
	Build community awareness about the importance of stopping illegal activities and the importance of keeping tourist areas clean and litter-free		X	X	X	X	X	Shared with MEST or EPA	(i) EPA (ii) GTA	<u>Success criteria</u>: Illegal activities are reduced and tourist areas are kept clean <u>Remark:</u> GTA must be aware

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
										about environmental campaigns carried out by EPA and support these. It should initiate campaigns specifically aimed at the protecting tourism assets
	Encourage the corporate social responsibility of large firms from other sectors to protect the environment and contribute to the tourism sector		X	X	X	X	X	From existing budgets	(i) MOT, GTA	Success criteria: Several business from other sectors especially (Oil, Gas, and Mining) are engaging with the tourism sector and contributing to its development Remarks: A study needs to be carried out to identify the businesses that are impacting on tourism areas and approach them to obtain their commitment to behave ethically and contribute to economic development; they should be invited to the PPP forum organised by the MOT
X.	**COMMUNITY INVOLVEMENT**									
	Establish community tourism desks at the MOT and absorb Ghana Rural Ecotourism and Travel Office (GREET) into the GTA as an independent unit		X						(i) GTA; MOT	Success criteria: GREET operates under the auspices of the GTA, is supported financially and provides the GTA with a direct involvement with local communities; a desk is set up at the MOT
	Set up Destination Management Organisations (DMO) in Ghana's tourism zones		X	X	X	X	X	Will vary according to the size and the	(i) GTA (ii) Private sector; local communities;	Success criteria: Several DMOs are operating successfully in Ghana's tourism zones

No.	Project/Action	Years 0	1	2	3	4	5	Cost In USD	Responsibility	Success criteria and remarks
								level of tourism developme nt in each area	NGOs	Benchmarks: • Identify Destination Management Areas around Ghana • Bring together different stakeholders within these areas to agree to work together and cooperate to the development of the area • Set up a Destination Management Unit • Explore funding options for the operation of DMOs
	Create partnerships with the local communities		X	X	X	X	X		(i) GTA (ii) Private sector; local communities; NGOs	Success criteria: Improve supply and value chain; employment and income generation for local communities; value-added to private sector products Benchmarks: Create partnerships between the private sector and public sector institutions such as the District Assemblies and: • Handicraft producers. • Music and dance performers • Local community tour guides • Local farmers and fishermen
	Review policies and regulations relating to employment rights of local communities, women, the youth and vulnerable groups working in the tourism sector		X						(i) MOT; Ministry of Employment and Social Welfare	Success criteria: policies and regulations are respected and enforced

No.	Project/Action	Years						Cost In USD	Responsibility	Success criteria and remarks
		0	1	2	3	4	5			
X.	**GENERAL RECOMENDATIONS**									
	Formulate and implement a signage strategy for each region in Ghana		X	X	X				(i) GTA (ii) MOTr; GMMB	Success criteria: Standardised and uniform signs indicating the direction to tourist attractions and informational signs at tourist attractions are established in all regions of Ghana Remark: ensure that signage follows international standards
	Develop viewpoints at scenic locations on tourist routes		X	X	X				(i) GTA	Success criteria: Viewpoints around Ghana are developed with amenities run by the local communities
	Establish campsites around Ghana		X	X	X	X	X		(i) GTA, MMDAs (ii) Private sector	Success criteria: Campsites around Ghana are developed, concessions awarded to the private sector with amenities run by the local communities

Project Team

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