WORLD TRAVEL & TOURISM COUNCIL

Travel & Tourism

ECONOMIC IMPACT 2016
SUB SAHARAN AFRICA

The survival of many fish species depends on migrations up and down rivers. A fish ladder provides a detour route for migrating fish past a particular obstruction on the river. Designs vary but in general all fish ladders contain a series of ascending pools that are reached by swimming against a stream of water. Fish leap through the cascade of rushing water, rest in a pool, and then repeat the process until they are out of the ladder.

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FOREWORD

The World Travel & Tourism Council (WTTC) is the global authority on the economic and social contribution of Travel & Tourism. WTTC promotes sustainable growth for the sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity.

For over 25 years, WTTC has been quantifying the economic impact of Travel & Tourism. This year, the 2016 Annual Economic Reports cover 184 countries and 24 regions of the world. Our 10 year forecasts provide a unique perspective on the sector's potential for long-term growth, and the continued vital contribution to the economic strength and social development of the world.

For the fifth successive year, the growth of the Travel & Tourism sector in 2015 (2.8%) outpaced that of the global economy (2.3%) and a number of other major sectors such as manufacturing and retail. In total, Travel & Tourism generated US $7.2 trillion (9.8% of global GDP) and supported 284 million jobs, equivalent to 1 in 11 jobs in the global economy.

The outlook for Travel & Tourism in 2016 remains robust, despite economic fragilities and other sources of volatility in the wider market. The sector's GDP growth contribution is expected to accelerate and again outpace growth of the wider economy. Stronger growth in 2016 is likely to be underpinned by an improving global economy. The lowest oil prices in more than a decade will continue to boost demand through lower transport costs, whilst household finances and disposable income will benefit from reduced energy costs.

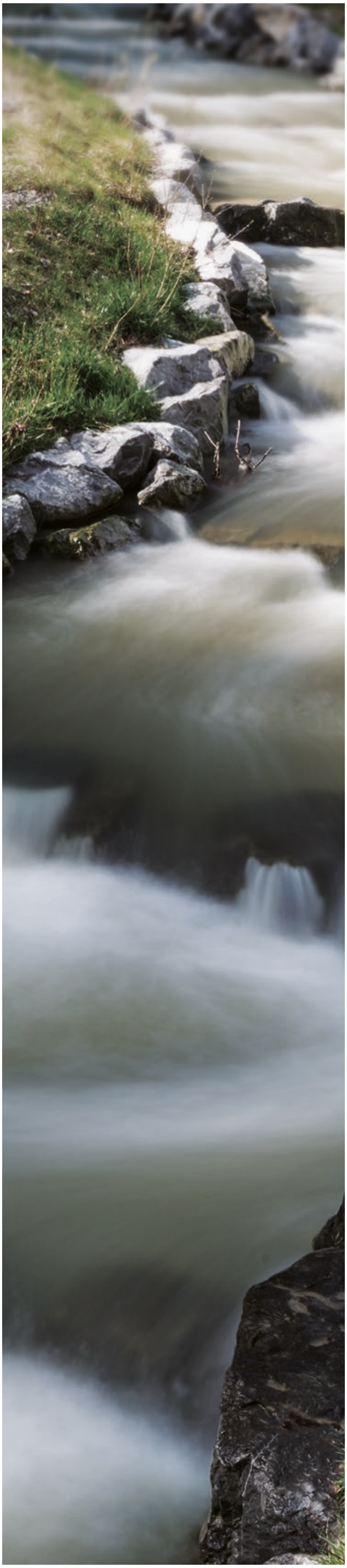
Through the last year, safety and security concerns have moved into the spotlight, and we have to assume that these issues will continue to cause difficulties in the years ahead. We note that the sector remains resilient and that governments are working hard to ensure the safety of tourists and to minimise the impact of security threats. Incidents such as the ones we observed with shock and sadness in recent months will not stop people travelling, as the world continues to go about its business.

There are other factors which are influencing the flow of travellers around the world. Notably, the strength of the US dollar relative to other currencies is shifting the price competitiveness of destinations and will affect who travels where this year. Undoubtedly new developments will emerge alongside these existing factors. Travel & Tourism is a key force for good, and it has proven in the past that it is strong and adaptable enough to face any challenges. It will continue to grow, to create jobs, and to bring economic and social benefits.

The Travel & Tourism sector is expected to grow faster than the wider economy and many other industries over the next decade. It is anticipated to support over 370 million jobs by 2026. Such strong growth will require tourism destinations across the world to provide environments that are conducive to business development. It will require effective coordination between public institutions and the private sector around the world.

WTTC is proud to contribute the evidence base required for public and private bodies to make the right decisions for the future growth of a sustainable Travel & Tourism sector.

David Scowsill
President & CEO



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THE ECONOMIC IMPACT OF TRAVEL & TOURISM MARCH 2016

Sub Saharan Africa

2016 ANNUAL RESEARCH: KEY FACTS[1]

2016 forecast

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was USD41.9bn (2.7% of total GDP) in 2015, and is forecast to rise by 3.4% in 2016, and to rise by 5.2% pa, from 2016-2026, to USD72.0bn (2.6% of total GDP) in 2026.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was USD108.9bn (6.9% of GDP) in 2015, and is forecast to rise by 3.3% in 2016, and to rise by 5.2% pa to USD187.2bn (6.8% of GDP) in 2026.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2015 Travel & Tourism directly supported 6,696,000 jobs (2.6% of total employment). This is expected to rise by 0.4% in 2016 and rise by 2.5% pa to 8,625,000 jobs (2.5% of total employment) in 2026.

EMPLOYMENT: TOTAL CONTRIBUTION

In 2015, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 6.5% of total employment (16,546,500 jobs). This is expected to rise by 0.2% in 2016 to 16,576,500 jobs and rise by 2.7% pa to 21,631,000 jobs in 2026 (6.3% of total).

VISITOR EXPORTS

Visitor exports generated USD29.9bn (7.9% of total exports) in 2015. This is forecast to grow by 2.6% in 2016, and grow by 5.2% pa, from 2016-2026, to USD50.9bn in 2026 (7.9% of total).

INVESTMENT

Travel & Tourism investment in 2015 was USD18.3bn, or 5.7% of total investment. It should rise by 5.9% in 2016, and rise by 4.4% pa over the next ten years to USD29.8bn in 2026 (5.2% of total).

[1]All values are in constant 2015 prices & exchange rates

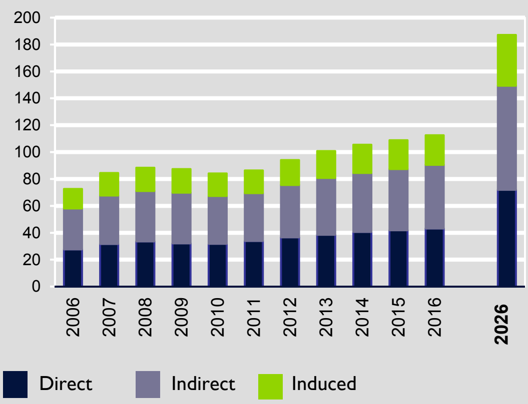
WORLD RANKING (OUT OF 12 REGIONS):

Relative importance of Travel & Tourism's total contribution to GDP

10	11	4	4
ABSOLUTE	RELATIVE SIZE	GROWTH	LONG-TERM GROWTH
Size in 2015	Contribution to GDP in 2015	2016 forecast	Forecast 2016-2026

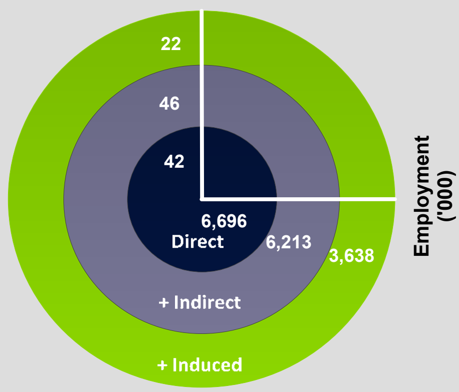
Total Contribution of Travel & Tourism to GDP

2015 USDbn



Breakdown of Travel & Tourism's Total Contribution to GDP and Employment 2015

GDP (2015 USDbn)



= Total contribution of Travel & Tourism

Defining the economic contribution of Travel & Tourism

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the sector has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. WTTC recognises that Travel & Tourism's total contribution is much greater however, and aims to capture its indirect and induced impacts through its annual research.

DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists.The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism industries. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

TOTAL CONTRIBUTION

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists - including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

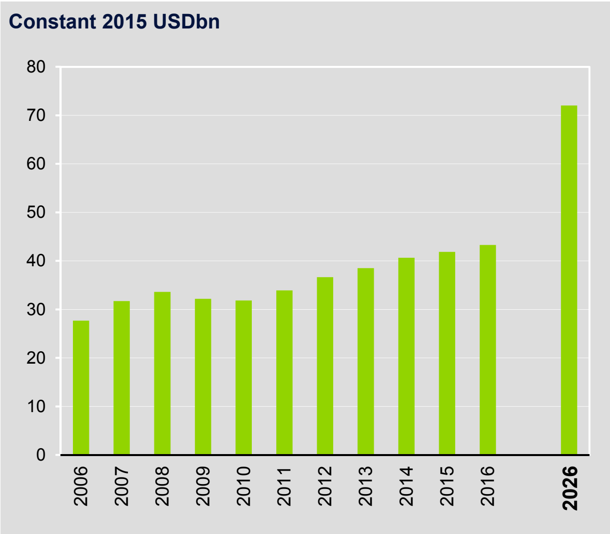
The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism sector.

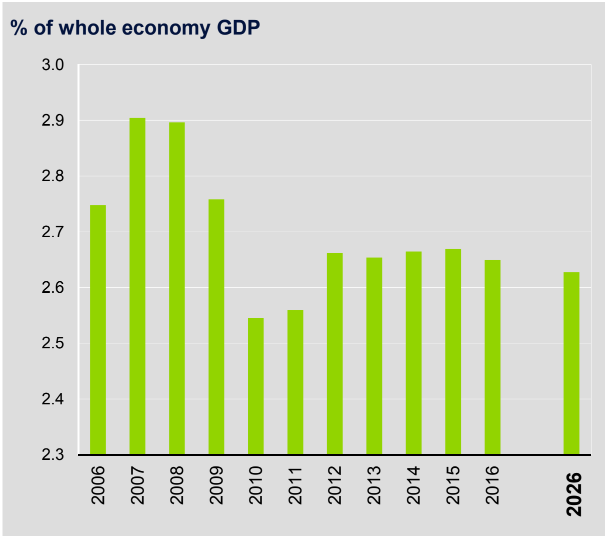
Travel & Tourism's contribution to GDP[1]

The direct contribution of Travel & Tourism to GDP in 2015 was USD41.9bn (2.7% of GDP). This is forecast to rise by 3.4% to USD43.3bn in 2016.This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported

The direct contribution of Travel & Tourism to GDP is expected to grow by 5.2% pa to USD72.0bn (2.6% of GDP) by 2026.

SUB SAHARAN AFRICA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

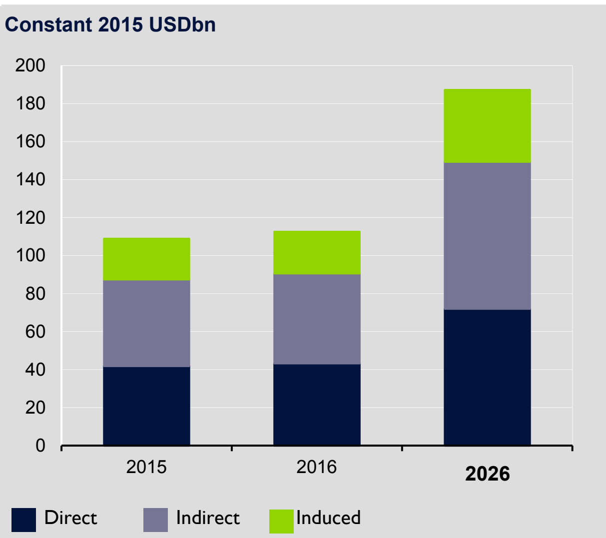


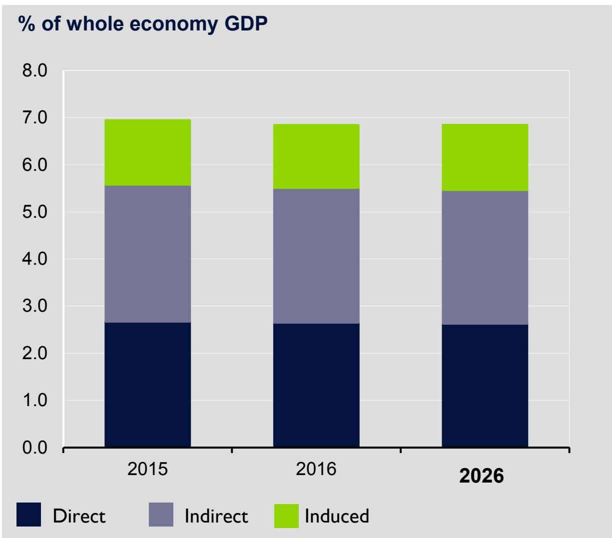


The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was USD108.9bn in 2015 (6.9% of GDP) and is expected to grow by 3.3% to USD112.6bn (6.8% of GDP) in 2016.

It is forecast to rise by 5.2% pa to USD187.2bn by 2026 (6.8% of GDP).

SUB SAHARAN AFRICA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP





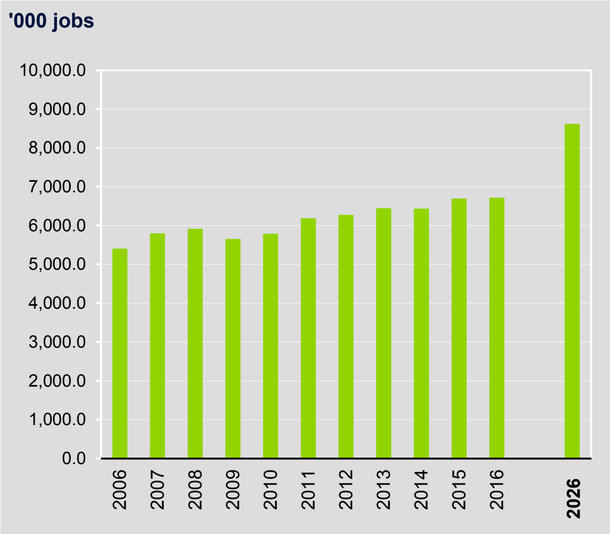
[1] All values are in constant 2015 prices & exchange rates

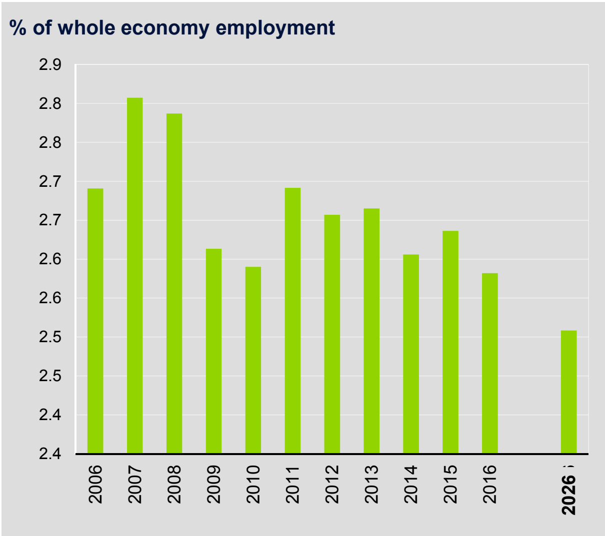
Travel & Tourism's contribution to employment

Travel & Tourism generated 6,696,000 jobs directly in 2015 (2.6% of total employment) and this is forecast to grow by 0.4% in 2016 to 6,720,000 (2.6% of total employment).
This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2026, Travel & Tourism will account for 8,625,000 jobs directly, an increase of 2.5% pa over the next ten years.

SUB SAHARAN AFRICA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

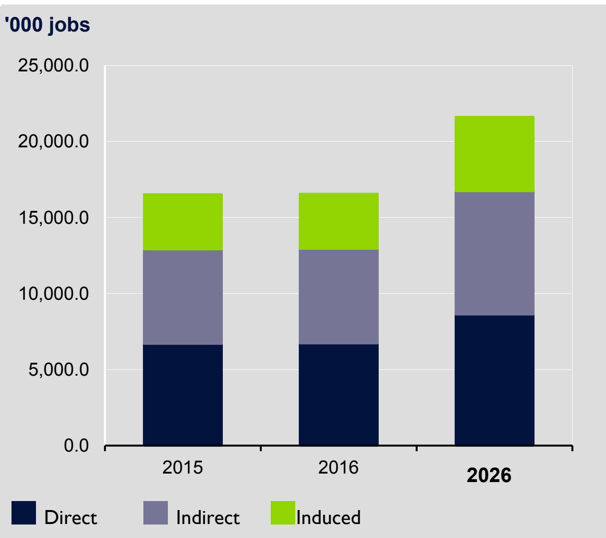


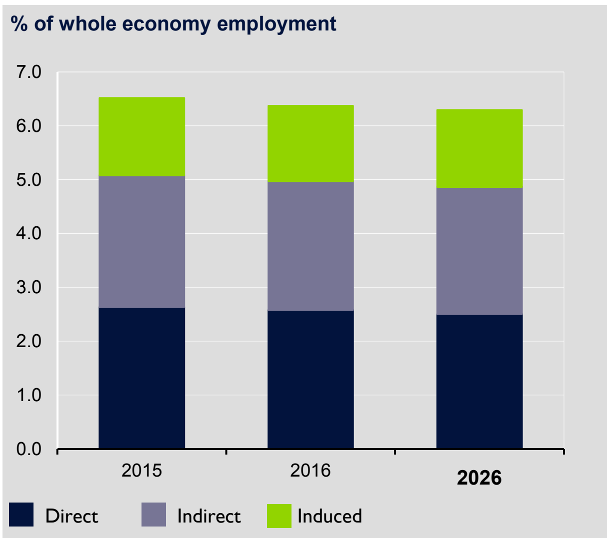


The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 16,546,500 jobs in 2015 (6.5% of total employment). This is forecast to rise by 0.2% in 2016 to 16,576,500 jobs (6.4% of total employment).

By 2026, Travel & Tourism is forecast to support 21,631,000 jobs (6.3% of total employment), an increase of 2.7% pa over the period.

SUB SAHARAN AFRICA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT





Visitor Exports and Investment[1]

VISITOR EXPORTS

Money spent by foreign visitors to a country (or visitor exports) is a key component of the direct contribution of Travel & Tourism. In 2015, Sub Saharan Africa generated USD29.9bn in visitor exports. In 2016, this is expected to grow by 2.6%, and the region is expected to attract 37,454,000 international tourist arrivals.

By 2026, international tourist arrivals are forecast to total 60,555,000, generating expenditure of USD50.9bn, an increase of 5.2% pa.

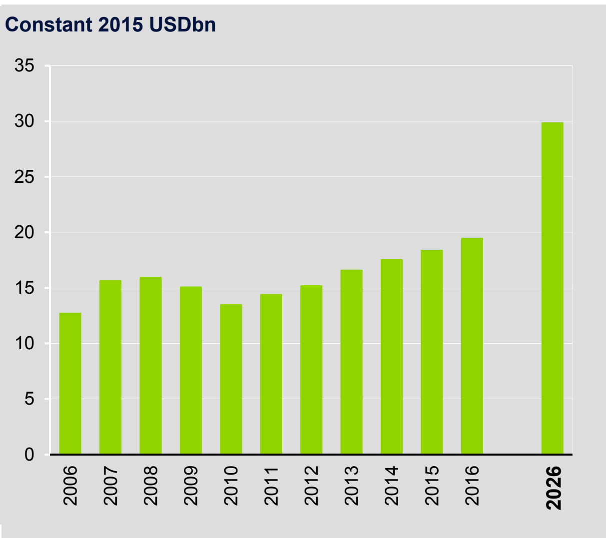
SUB SAHARAN AFRICA: VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

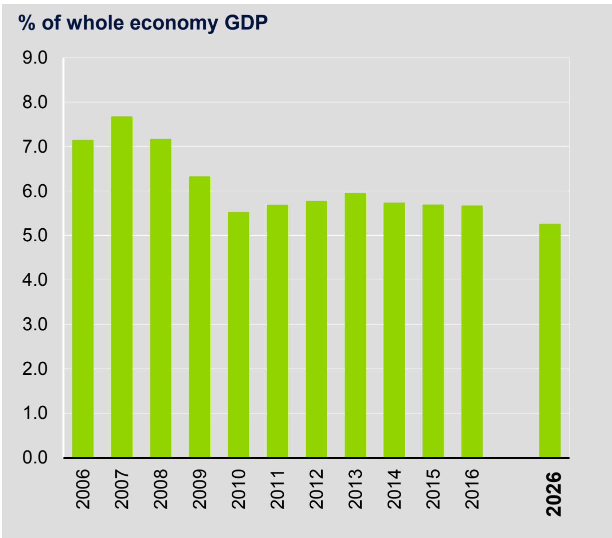
INVESTMENT

Travel & Tourism is expected to have attracted capital investment of USD18.3bn in 2015. This is expected to rise by 5.9% in 2016, and rise by 4.4% pa over the next ten years to USD29.8bn in 2026.

Travel & Tourism's share of total national investment will fall from 5.7% in 2016 to 5.2% in 2026.

SUB SAHARAN AFRICA: CAPITAL INVESTMENT IN TRAVEL & TOURISM





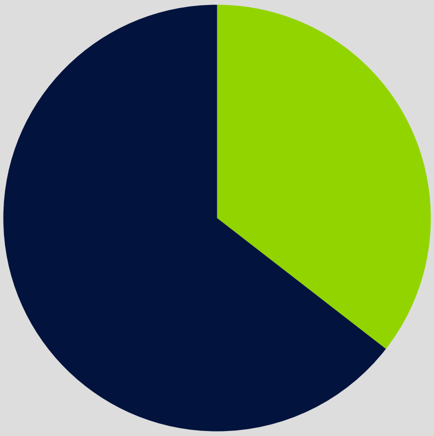
[1] All values are in constant 2015 prices & exchange rates

Different components of Travel & Tourism[1]

Sub Saharan Africa
Travel & Tourism's Contribution to GDP:
Business vs Leisure, 2015

Leisure spending
64.5%

Business spending
35.5%



Leisure travel spending (inbound and domestic) generated 64.5% of direct Travel & Tourism GDP in 2015 (USD49.6bn) compared with 35.5% for business travel spending (USD27.3bn).

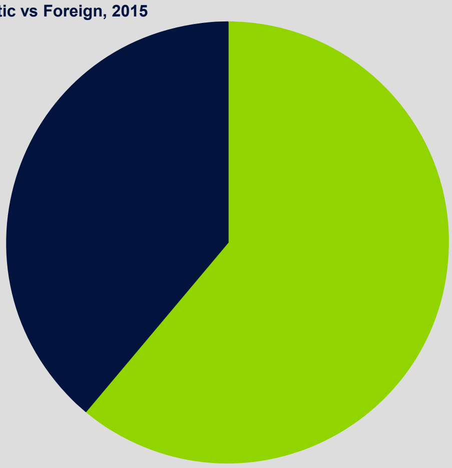
Leisure travel spending is expected to grow by 3.7% in 2016 to USD51.4bn, and rise by 5.1% pa to USD84.9bn in 2026.

Business travel spending is expected to grow by 3.4% in 2016 to USD28.2bn, and rise by 4.9% pa to USD45.5bn in 2026.

Sub Saharan Africa
Travel & Tourism's Contribution to GDP:
Domestic vs Foreign, 2015

Foreign visitor spending
38.9%

Domestic spending
61.1%



Domestic travel spending generated 61.1% of direct Travel & Tourism GDP in 2015 compared with 38.9% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 4.2% in 2016 to USD49.0bn, and rise by 5.0% pa to USD79.4bn in 2026.

Visitor exports are expected to grow by 2.6% in 2016 to USD30.7bn, and rise by 5.2% pa to USD50.9bn in 2026.

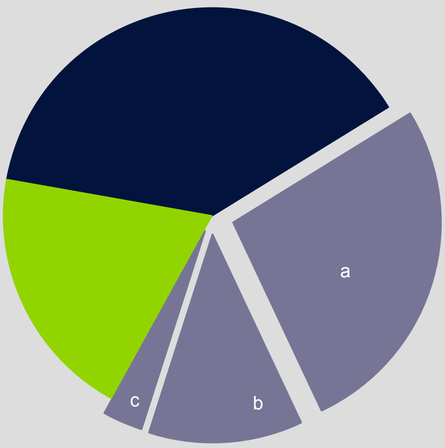
Sub Saharan Africa
Breakdown of Travel & Tourism's Total Contribution to GDP, 2015

Direct
38.4%

Induced
19.7%

Indirect
41.8%

Indirect is the sum of:
(a) Supply chain **26.8%**
(b) Investment **11.9%**
(c) Government collective **3.1%**



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is nearly three times greater than its direct contribution.

[1] All values are in constant 2015 prices & exchange rates

Regional rankings:
Absolute contribution, 2015

Travel & Tourism's Direct Contribution to GDP		2015 (US$bn)
1	European Union	605.6
2	North America	596.1
3	North East Asia	405.8
4	Latin America	135.6
5	South East Asia	121.7
6	Other Europe	93.1
7	Middle East	72.4
8	South Asia	59.9
9	Oceania	48.4
10	**Sub Saharan Africa**	41.9
11	North Africa	32.4
12	Caribbean	16.8

Travel & Tourism's Total Contribution to GDP		2015 (US$bn)
1	North America	1741.7
2	European Union	1609.8
3	North East Asia	1369.5
4	Latin America	371.8
5	South East Asia	301.7
6	Other Europe	286.2
7	Middle East	194.5
8	Oceania	175.2
9	South Asia	170.4
10	**Sub Saharan Africa**	108.9
11	North Africa	71.0
12	Caribbean	53.1

Travel & Tourism's Direct Contribution to Employment		2015 '000 jobs
1	South Asia	26841.2
2	North East Asia	25015.3
3	South East Asia	12474.2
4	European Union	11342.8
5	North America	10058.7
6	**Sub Saharan Africa**	6696.3
7	Latin America	6037.8
8	Other Europe	2886.3
9	Middle East	2519.0
10	North Africa	2386.6
11	Oceania	866.4
12	Caribbean	708.5

Travel & Tourism's Total Contribution to Employment		2015 '000 jobs
1	North East Asia	72865.1
2	South Asia	45110.9
3	South East Asia	32213.4
4	European Union	25647.8
5	North America	23677.1
6	Latin America	16576.4
7	**Sub Saharan Africa**	16546.4
8	Other Europe	10200.2
9	Middle East	5919.9
10	North Africa	5409.9
11	Oceania	2395.3
12	Caribbean	2255.0

Travel & Tourism Capital Investment		2015 (US$bn)
1	North East Asia	189.7
2	North America	166.8
3	European Union	152.9
4	South East Asia	48.5
5	Latin America	46.8
6	Middle East	41.8
7	South Asia	40.5
8	Other Europe	33.7
9	**Sub Saharan Africa**	18.3
10	Oceania	17.8
11	North Africa	11.2
12	Caribbean	6.6

Visitor Exports		2015 (US$bn)
1	European Union	415.4
2	North America	223.2
3	North East Asia	204.4
4	South East Asia	115.5
5	Other Europe	91.2
6	Middle East	72.5
7	Latin America	44.2
8	Oceania	38.3
9	**Sub Saharan Africa**	29.9
10	Caribbean	29.6
11	South Asia	27.8
12	North Africa	16.8

The tables on pages 7-10 provide provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world average.
The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

Regional rankings: Relative contribution, 2015

Travel & Tourism's Direct Contribution to GDP		2015 % share
1	South East Asia	5.0
2	North Africa	4.9
3	Caribbean	4.7
4	European Union	3.7
5	Oceania	3.3
6	Latin America	3.3
7	Middle East	3.0
8	North America	2.9
9	**Sub Saharan Africa**	2.7
10	Other Europe	2.6
11	North East Asia	2.4
12	South Asia	2.3

Travel & Tourism's Total Contribution to GDP		2015 % share
1	Caribbean	14.8
2	South East Asia	12.4
3	Oceania	12.1
4	North Africa	10.8
5	European Union	9.9
6	Latin America	9.0
7	North America	8.4
8	Other Europe	8.0
9	Middle East	8.0
10	North East Asia	8.0
11	**Sub Saharan Africa**	6.9
12	South Asia	6.4

Travel & Tourism's Direct Contribution to Employment		2015 % share
1	European Union	5.0
2	South Asia	4.8
3	Oceania	4.7
4	North America	4.6
5	North Africa	4.6
6	Caribbean	4.2
7	South East Asia	4.1
8	Middle East	3.3
9	Latin America	2.9
10	North East Asia	2.8
11	**Sub Saharan Africa**	2.6
12	Other Europe	1.7

Travel & Tourism's Total Contribution to Employment		2015 % share
1	Caribbean	13.3
2	Oceania	13.1
3	European Union	11.4
4	North America	10.9
5	South East Asia	10.5
6	North Africa	10.4
7	North East Asia	8.3
8	Latin America	8.0
9	South Asia	8.0
10	Middle East	7.8
11	**Sub Saharan Africa**	6.5
12	Other Europe	6.1

Travel & Tourism Investment Contribution to Total Capital Investment		2015 % share
1	Caribbean	12.1
2	North Africa	7.7
3	South East Asia	7.3
4	Middle East	6.4
5	Latin America	5.9
6	South Asia	5.7
7	**Sub Saharan Africa**	5.7
8	Oceania	4.9
9	European Union	4.9
10	Other Europe	4.4
11	North America	4.0
12	North East Asia	3.1

Visitor Exports Contribution to Total Exports		2015 % share
1	Caribbean	18.8
2	Oceania	12.3
3	North Africa	11.7
4	South East Asia	8.0
5	**Sub Saharan Africa**	7.9
6	North America	7.1
7	Latin America	6.7
8	Middle East	6.3
9	European Union	5.9
10	South Asia	5.4
11	Other Europe	4.8
12	North East Asia	4.3

Regional rankings: Real growth, 2016

	Travel & Tourism's Direct Contribution to GDP	2016 % growth
1	South Asia	6.2
2	South East Asia	5.1
3	North East Asia	4.8
4	Oceania	4.4
5	Middle East	4.4
6	**Sub Saharan Africa**	3.4
7	European Union	3.1
8	North America	3.0
9	Caribbean	2.4
10	North Africa	1.4
11	Other Europe	1.4
12	Latin America	-0.5

	Travel & Tourism's Total Contribution to GDP	2016 % growth
1	South Asia	6.7
2	South East Asia	5.2
3	North East Asia	5.1
4	Middle East	4.4
5	Oceania	4.1
6	**Sub Saharan Africa**	3.3
7	North America	3.1
8	European Union	3.1
9	Caribbean	2.7
10	North Africa	1.6
11	Other Europe	1.5
12	Latin America	-0.3

	Travel & Tourism's Direct Contribution to Employment	2016 % growth
1	South Asia	3.0
2	Middle East	2.6
3	South East Asia	2.2
4	Other Europe	2.0
5	European Union	1.8
6	North America	1.7
7	North East Asia	1.5
8	Oceania	1.1
9	Latin America	0.9
10	Caribbean	0.6
11	**Sub Saharan Africa**	0.4
12	North Africa	0.3

	Travel & Tourism's Total Contribution to Employment	2016 % growth
1	Middle East	3.1
2	South Asia	2.9
3	North East Asia	2.7
4	North America	2.2
5	South East Asia	2.1
6	Oceania	1.6
7	European Union	1.5
8	Other Europe	1.1
9	Caribbean	0.9
10	Latin America	0.8
11	North Africa	0.2
12	**Sub Saharan Africa**	0.2

	Travel & Tourism Investment	2016 % growth
1	South East Asia	6.1
2	**Sub Saharan Africa**	5.9
3	South Asia	5.4
4	North America	5.4
5	Middle East	5.1
6	North East Asia	4.6
7	Caribbean	4.5
8	European Union	4.4
9	Latin America	3.9
10	North Africa	3.4
11	Other Europe	2.6
12	Oceania	1.6

	Visitor Exports	2016 % growth
1	Oceania	6.4
2	South Asia	4.7
3	South East Asia	4.6
4	European Union	3.8
5	North East Asia	3.3
6	Middle East	2.8
7	Caribbean	2.7
8	**Sub Saharan Africa**	2.6
9	Latin America	2.1
10	Other Europe	1.6
11	North America	0.7
12	North Africa	-1.2

Regional rankings:
Long term growth, 2016 - 2026

Travel & Tourism's Direct Contribution to GDP		2016 - 2026 % growth pa
1	South Asia	7.2
2	South East Asia	5.7
3	North East Asia	5.7
4	**Sub Saharan Africa**	5.2
5	Middle East	4.9
6	North Africa	4.1
7	North America	3.8
8	Latin America	3.7
9	Other Europe	3.6
10	Oceania	3.5
11	Caribbean	3.4
12	European Union	2.8

Travel & Tourism's Total Contribution to GDP		2016 - 2026 % growth pa
1	South Asia	7.1
2	South East Asia	5.8
3	North East Asia	5.6
4	**Sub Saharan Africa**	5.2
5	Middle East	4.9
6	North Africa	4.2
7	Latin America	3.7
8	North America	3.5
9	Other Europe	3.5
10	Caribbean	3.4
11	Oceania	3.2
12	European Union	2.7

Travel & Tourism's Direct Contribution to Employment		2016 - 2026 % growth pa
1	Middle East	3.4
2	South East Asia	3.1
3	Other Europe	2.7
4	North Africa	2.6
5	**Sub Saharan Africa**	2.5
6	Latin America	2.4
7	Caribbean	2.2
8	North America	2.1
9	South Asia	2.0
10	European Union	1.8
11	North East Asia	1.5
12	Oceania	1.4

Travel & Tourism's Total Contribution to Employment		2016 - 2026 % growth pa
1	Middle East	3.4
2	North East Asia	3.2
3	South East Asia	2.8
4	**Sub Saharan Africa**	2.7
5	North Africa	2.4
6	Latin America	2.3
7	North America	2.2
8	Caribbean	2.0
9	Other Europe	2.0
10	South Asia	2.0
11	Oceania	1.7
12	European Union	1.4

Travel & Tourism Investment Contribution to Capital Investment		2016 - 2026 % growth pa
1	South Asia	6.4
2	South East Asia	6.3
3	Middle East	5.4
4	North East Asia	5.3
5	**Sub Saharan Africa**	4.4
6	North America	4.1
7	Latin America	3.8
8	Other Europe	3.7
9	Caribbean	3.6
10	North Africa	3.6
11	European Union	2.9
12	Oceania	2.1

Visitor Exports Contribution to Exports		2016 - 2026 % growth pa
1	South Asia	6.8
2	South East Asia	6.3
3	Latin America	5.3
4	**Sub Saharan Africa**	5.2
5	Middle East	5.1
6	North Africa	4.8
7	Other Europe	4.8
8	North America	4.5
9	Oceania	3.8
10	Caribbean	3.6
11	European Union	3.4
12	North East Asia	3.4

Summary tables: Estimates & Forecasts

Sub Saharan Africa	2015 USDbn[1]	2015 % of total	2016 Growth[2]	2026 USDbn[1]	2026 % of total	2026 Growth[3]
Direct contribution to GDP	41.9	2.7	3.4	72.0	2.6	5.2
Total contribution to GDP	108.9	6.9	3.3	187.2	6.8	5.2
Direct contribution to employment[4]	6,696	2.6	0.4	8,625	2.5	2.5
Total contribution to employment[4]	16,546	6.5	0.2	21,631	6.3	2.7
Visitor exports	29.9	7.9	2.6	50.9	7.9	5.2
Domestic spending	47.0	3.0	4.2	79.4	2.2	5.0
Leisure spending	49.6	1.7	3.7	84.9	1.7	5.1
Business spending	27.3	1.0	3.4	45.5	0.9	4.9
Capital investment	18.3	5.7	5.9	29.8	5.2	4.4

[1]2015 constant prices & exchange rates; [2]2016 real growth adjusted for inflation (%); [3]2016-2026 annualised real growth adjusted for inflation (%); [4]'000 jobs

Africa	2015 US$bn[1]	2015 % of total	2016 Growth[2]	2026 US$bn[1]	2026 % of total	2026 Growth[3]
Direct contribution to GDP	74.3	3.3	2.5	121.3	3.2	4.8
Total contribution to GDP	180.0	8.1	2.6	295.7	7.9	4.8
Direct contribution to employment[4]	9,083	3.0	0.3	11,707	2.9	2.5
Total contribution to employment[4]	21,956	7.2	0.2	28,513	7.0	2.6
Visitor exports	46.7	9.0	1.2	77.6	8.5	5.1
Domestic spending	77.0	3.5	3.8	123.8	2.5	4.5
Leisure spending	86.6	2.3	2.6	141.3	2.3	4.7
Business spending	37.1	1.0	3.3	60.1	0.9	4.6
Capital investment	29.6	6.3	5.0	46.3	5.8	4.1

[1]2015 constant prices & exchange rates; [2]2016 real growth adjusted for inflation (%); [3]2016-2026 annualised real growth adjusted for inflation (%); [4]'000 jobs

Worldwide	2015 US$bn[1]	2015 % of total	2016 Growth[2]	2026 US$bn[1]	2026 % of total	2026 Growth[3]
Direct contribution to GDP	2,229.8	3.0	3.3	3,469.1	3.4	4.2
Total contribution to GDP	7,170.3	9.8	3.5	10,986.5	10.8	4.0
Direct contribution to employment[4]	107,833	3.6	1.9	135,884	4.0	2.1
Total contribution to employment[4]	283,578	9.5	2.2	370,204	11.0	2.5
Visitor exports	1,308.9	6.1	3.0	2,056.0	6.2	4.3
Domestic spending	3,419.9	4.7	3.3	5,245.5	3.9	4.0
Leisure spending	3,621.9	2.3	3.0	5,645.8	2.6	4.2
Business spending	1,106.9	0.7	3.9	1,658.8	0.8	3.7
Capital investment	774.6	4.3	4.7	1,254.2	4.7	4.5

[1]2015 constant prices & exchange rates; [2]2016 real growth adjusted for inflation (%); [3]2016-2026 annualised real growth adjusted for inflation (%); [4]'000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment.

The economic contribution of Travel & Tourism: Real 2015 prices

Sub Saharan Africa (USDbn, real 2015 prices)	2010	2011	2012	2013	2014	2015	2016E	2026F
1. Visitor exports	22.7	24.2	26.0	26.9	28.3	29.9	30.7	50.9
2. Domestic expenditure (includes government individual spending)	35.9	38.0	41.6	44.3	46.3	47.0	49.0	79.4
3. Internal tourism consumption (= 1 + 2)	58.7	62.3	67.6	71.3	74.6	76.9	79.6	130.4
4. Purchases by tourism providers, including imported goods (supply chain)	-26.8	-28.4	-30.9	-32.7	-33.9	-35.0	-36.3	-58.4
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	31.8	33.9	36.7	38.5	40.7	41.9	43.3	72.0
Other final impacts (indirect & induced) 6. Domestic supply chain	23.2	24.5	26.5	27.7	29.1	29.9	30.9	50.5
7. Capital investment	13.5	14.4	15.1	16.6	17.5	18.3	19.4	29.8
8. Government collective spending	2.6	2.8	2.9	3.2	3.3	3.5	3.7	6.4
9. Imported goods from indirect spending	-3.7	-6.1	-5.7	-5.1	-6.0	-6.2	-6.7	-9.3
10. Induced	16.8	16.9	18.5	20.0	20.9	21.5	22.0	37.8
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	84.2	86.5	94.1	100.9	105.5	108.9	112.6	187.2
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	5,788.9	6,188.1	6,278.5	6,451.0	6,439.1	6,696.3	6,720.4	8,625.4
13. Total contribution of Travel & Tourism to employment	14,432.7	15,010.3	15,512.7	16,050.7	15,961.3	16,546.4	16,576.3	21,631.4
Other indicators **14.** Expenditure on outbound travel	21.8	22.5	21.0	20.7	21.0	22.3	23.4	33.6

The economic contribution of Travel & Tourism: Nominal prices

Sub Saharan Africa (USDbn, nominal prices)	2010	2011	2012	2013	2014	2015	2016E	2026F
1. Visitor exports	24.6	27.4	29.7	30.2	31.3	29.9	28.7	66.7
2. Domestic expenditure (includes government individual spending)	38.3	43.6	47.7	50.6	52.0	47.0	45.8	105.1
3. Internal tourism consumption (= 1 + 2)	62.9	71.0	77.3	80.8	83.2	76.9	74.5	171.9
4. Purchases by tourism providers, including imported goods (supply chain)	-29.3	-33.0	-35.8	-37.2	-37.9	-35.0	-33.8	-29.3
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	33.6	38.0	41.5	43.5	45.4	41.9	40.7	94.6
Other final impacts (indirect & induced) 6. Domestic supply chain	25.5	28.7	30.8	31.6	32.5	29.9	28.6	66.9
7. Capital investment	14.3	16.2	17.3	18.8	19.6	18.3	18.0	39.1
8. Government collective spending	2.7	3.1	3.3	3.6	3.7	3.5	3.6	8.2
9. Imported goods from indirect spending	-3.9	-6.7	-6.3	-5.7	-6.8	-6.2	-6.3	-12.2
10. Induced	18.0	19.3	21.2	22.7	23.4	21.5	20.5	49.8
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	90.1	98.7	107.9	114.5	117.8	108.9	105.0	246.4
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	5,788.9	6,188.1	6,278.5	6,451.0	6,439.1	6,696.3	6,720.4	8,625.4
13. Total contribution of Travel & Tourism to employment	14,432.7	15,010.3	15,512.7	16,050.7	15,961.3	16,546.4	16,576.3	21,631.4
Other indicators **14.** Expenditure on outbound travel	23.6	26.0	24.3	24.0	23.9	22.3	21.7	45.4

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

The economic contribution of Travel & Tourism: Growth

Sub Saharan Africa Growth[1] (%)	2010	2011	2012	2013	2014	2015	2016E	2026F [2]
1. Visitor exports	3.6	6.6	7.2	3.7	5.2	5.6	2.6	5.2
2. Domestic expenditure (includes government individual spending)	-3.9	5.9	9.4	6.6	4.3	1.5	4.2	5.0
3. Internal tourism consumption (= 1 + 2)	-1.1	6.1	8.5	5.5	4.6	3.1	3.6	5.1
4. Purchases by tourism providers, including imported goods (supply chain)	-1.2	5.7	9.0	5.9	3.6	3.2	3.8	4.9
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	-1.1	6.5	8.1	5.1	5.5	3.0	3.4	5.2
Other final impacts (indirect & induced) 6. Domestic supply chain	-0.5	5.8	7.9	4.6	5.2	2.7	3.5	5.0
7. Capital investment	-10.5	6.7	5.5	9.3	5.7	4.7	5.9	4.4
8. Government collective spending	2.6	5.2	6.3	7.3	4.5	5.5	5.3	5.6
9. Imported goods from indirect spending	17.3	62.5	-6.6	-10.4	18.9	2.4	9.1	3.3
10. Induced	-4.6	1.0	9.6	7.9	4.6	2.7	2.1	5.6
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	-3.8	2.7	8.9	7.2	4.6	3.3	3.3	5.2
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	2.4	6.9	1.5	2.7	-0.2	4.0	0.4	2.5
13. Total contribution of Travel & Tourism to employment	-0.2	4.0	3.3	3.5	-0.6	3.7	0.2	2.7
Other indicators **14.** Expenditure on outbound travel	5.7	2.9	-6.6	-1.3	1.2	6.1	5.0	3.7

[1]2010-2015 real annual growth adjusted for inflation (%); [2]2016-2026 annualised real growth adjusted for inflation (%)

GLOSSARY

KEY DEFINITIONS

TRAVEL & TOURISM
Relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

DIRECT CONTRIBUTION TO GDP
GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

DIRECT CONTRIBUTION TO EMPLOYMENT
The number of direct jobs within Travel & Tourism. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

TOTAL CONTRIBUTION TO GDP
GDP generated directly by the Travel & Tourism sector plus its indirect and induced impacts (see below).

TOTAL CONTRIBUTION TO EMPLOYMENT
The number of jobs generated directly in the Travel & Tourism sector plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

VISITOR EXPORTS
Spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

DOMESTIC TRAVEL & TOURISM SPENDING
Spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

GOVERNMENT INDIVIDUAL SPENDING
Spending by government on Travel & Tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services (eg national parks).

INTERNAL TOURISM CONSUMPTION
Total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

BUSINESS TRAVEL & TOURISM SPENDING
Spending on business travel within a country by residents and international visitors.

LEISURE TRAVEL & TOURISM SPENDING
Spending on leisure travel within a country by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

INDIRECT CONTRIBUTION
The contribution to GDP and jobs of the following three factors:

- **CAPITAL INVESTMENT:** Includes capital investment spending by all industries directly involved in Travel & Tourism. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.

- **GOVERNMENT COLLECTIVE SPENDING:** Government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.

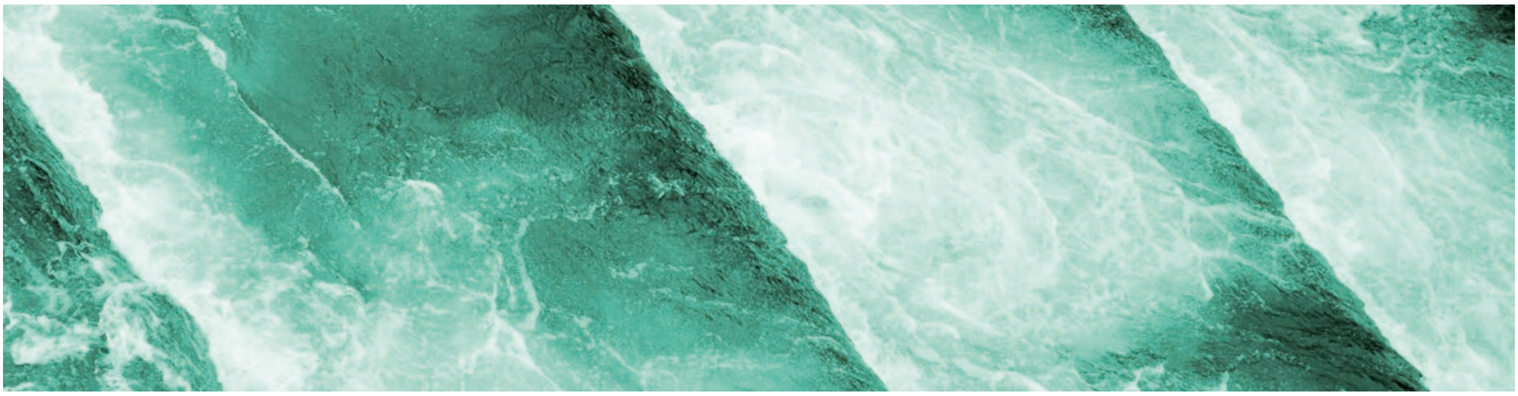
- **SUPPLY-CHAIN EFFECTS:** Purchases of domestic goods and services directly by different industries within Travel & Tourism as inputs to their final tourism output.

INDUCED CONTRIBUTION
The broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

OTHER INDICATORS

OUTBOUND EXPENDITURE
Spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

FOREIGN VISITOR ARRIVALS
The number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.



METHODOLOGICAL NOTE

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008). This involves benchmarking of country reports to official, published TSAs. This year the Ecuador TSA was integrated for the first time, alongside new data for Austria, Bermuda, Canada, Czech Rep, Ecuador, France, Lithuania, Malaysia, New Zealand, Nicaragua, Qatar, South Africa, Switzerland, UK, and the USA.

In addition to producing data on 184 countries, WTTC also produces reports on 24 other regions, sub-regions and economic and geographic groups. This year, there are 8 reports for special economic and geographic groups.

ECONOMIC AND GEOGRAPHIC GROUPS

APEC (ASIA-PAC IFIC ECONOMIC COOPERATION)
Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan, Thailand, USA, Vietnam.

THE COMMONWEALTH
Anguilla, Antigua and Barbuda, Australia, Bahamas, Bangladesh, Barbados, Belize, Bermuda, Botswana, Brunei, Cameroon, Canada, Cayman Islands, Cyprus, Dominica, Ghana, Grenada, Guyana, India, Jamaica, Kenya, Kiribati, Lesotho, Malawi, Malaysia, Maldives, Malta, Mauritius, Mozambique, Namibia, Nigeria, New Zealand, Pakistan, Papua New Guinea, Rwanda, South Africa, Seychelles, Sierra Leone, Singapore, Solomon Islands, Sri Lanka, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Swaziland, Tanzania, Tonga, Trinidad and Tobago, Uganda, UK, British Virgin Islands, Vanuatu, Zambia.

FORMER NETHERLANDS ANTILLES
Bonaire, Curacao, Sint Maarten, Saba and Sint Eustatius.

G20
Argentina, Australia, Brazil, Canada, China, European Union, France*, Germany*, India, Indonesia, Italy*, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, South Korea, Turkey, UK*, USA.

MEDITERRANEAN (MEDITERRANEAN TRAVEL ASSOCIATION)
Albania, Algeria, Bosnia Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Libya, Macedonia, Malta, Montenegro, Morocco, Portugal, Serbia, Slovenia, Spain, Syria, Tunisia, Turkey.

OAS (ORGANIZATION OF AMERICAN STATES)
Argentina, Antigua and Barbuda, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, St Kitts and Nevis, Nicaragua, Panama, Paraguay, Peru, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay.

OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)
Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

OTHER OCEANIA
American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

PACIFIC ALLIANCE
Chile, Colombia, Mexico, Peru.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)
Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

*included in European Union

ECONOMIC IMPACT REPORTS:

REGIONS, SUB REGIONS & COUNTRIES

WORLD

REGION	SUB REGION	COUNTRY
AFRICA	NORTH AFRICA	Algeria
		Egypt
		Libya
		Morocco
		Tunisia
	SUB-SAHARAN	Angola
		Benin
		Botswana
		Burkina Faso
		Burundi
		Cameroon
		Cape Verde
		Central African Republic
		Chad
		Comoros
		Democratic Republic of Congo
		Ethiopia
		Gabon
		Gambia
		Ghana
		Guinea
		Ivory Coast
		Kenya
		Lesotho
		Madagascar
		Malawi
		Mali
		Mauritius
		Mozambique
		Namibia
		Niger
		Nigeria
		Republic of Congo
		Reunion
		Rwanda
		Sao Tome & Principe
		Senegal
		Seychelles
		Sierra Leone
		South Africa
		Sudan
		Swaziland
		Tanzania
		Togo
		Uganda
		Zambia
		Zimbabwe

REGION	SUB REGION	COUNTRY
AMERICAS	CARIBBEAN	Anguilla
		Antigua & Barbuda
		Aruba
		Bahamas
		Barbados
		Bermuda
		Cayman Islands
		Cuba
		Former Netherlands Antilles
		Dominica
		Dominican Republic
		Grenada
		Guadeloupe
		Haiti
		Jamaica
		Martinique
		Puerto Rico
		St Kitts & Nevis
		St Lucia
		St Vincent & the Grenadines
		Trinidad & Tobago
		UK Virgin Islands
		US Virgin Islands
	LATIN AMERICA	Argentina
		Belize
		Bolivia
		Brazil
		Chile
		Colombia
		Costa Rica
		El Salvador
		Ecuador
		Guatemala
		Guyana
		Honduras
		Nicaragua
		Panama
		Paraguay
		Peru
		Suriname
		Uruguay
		Venezuela
	NORTH AMERICA	Canada
		Mexico
		USA

REGION	SUB REGION	COUNTRY
ASIA-PACIFIC	NORTHEAST ASIA	Japan
		China
		Hong Kong
		South Korea
		Macau
		Taiwan
		Mongolia
	OCEANIA	Australia
		New Zealand
		Fiji
		Kiribati
		Other Oceania
		Papua New Guinea
		Solomon Islands
		Tonga
		Vanuatu
	SOUTH ASIA	Bangladesh
		India
		Maldives
		Nepal
		Pakistan
		Sri Lanka
	SOUTHEAST ASIA (ASEAN)	Brunei
		Cambodia
		Indonesia
		Laos
		Malaysia
		Myanmar
		Philippines
		Singapore
		Thailand
		Vietnam
EUROPE	EUROPEAN UNION	Austria
		Belgium
		Bulgaria
		Croatia
		Cyprus
		Czech Republic
		Denmark
		Estonia
		Finland
		France
		Germany
		Greece
		Hungary
		Ireland
		Italy
		Latvia

REGION	SUB-REGION	COUNTRY
EUROPE	EUROPEAN UNION	Lithuania
		Luxembourg
		Malta
		Netherlands
		Poland
		Portugal
		Romania
		Slovakia
		Slovenia
		Spain
		Sweden
		UK
	OTHER EUROPE	Albania
		Armenia
		Azerbaijan
		Belarus
		Bosnia Herzegovina
		Georgia
		Iceland
		Kazakhstan
		Kyrgyzstan
		Macedonia
		Moldova
		Montenegro
		Norway
		Russian Federation
		Serbia
		Switzerland
		Turkey
		Ukraine
		Uzbekistan
MIDDLE EAST		Bahrain
		Iran
		Iraq
		Israel
		Jordan
		Kuwait
		Lebanon
		Oman
		Qatar
		Saudi Arabia
		Syria
		UAE
		Yemen

WORLD TRAVEL & TOURISM COUNCIL

The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism.

WTTC promotes sustainable growth for the sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading, private sector Travel & Tourism businesses.

Together with its research partner, Oxford Economics, WTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting 285 million jobs and generating 9.8% of global GDP in 2015. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 184 economies around the world. In addition to the individual country reports, WTTC produces a world report highlighting global trends and 24 further reports that focus on regions, sub-regions and economic and geographic groups. To download reports or data, please visit **www.wttc.org**

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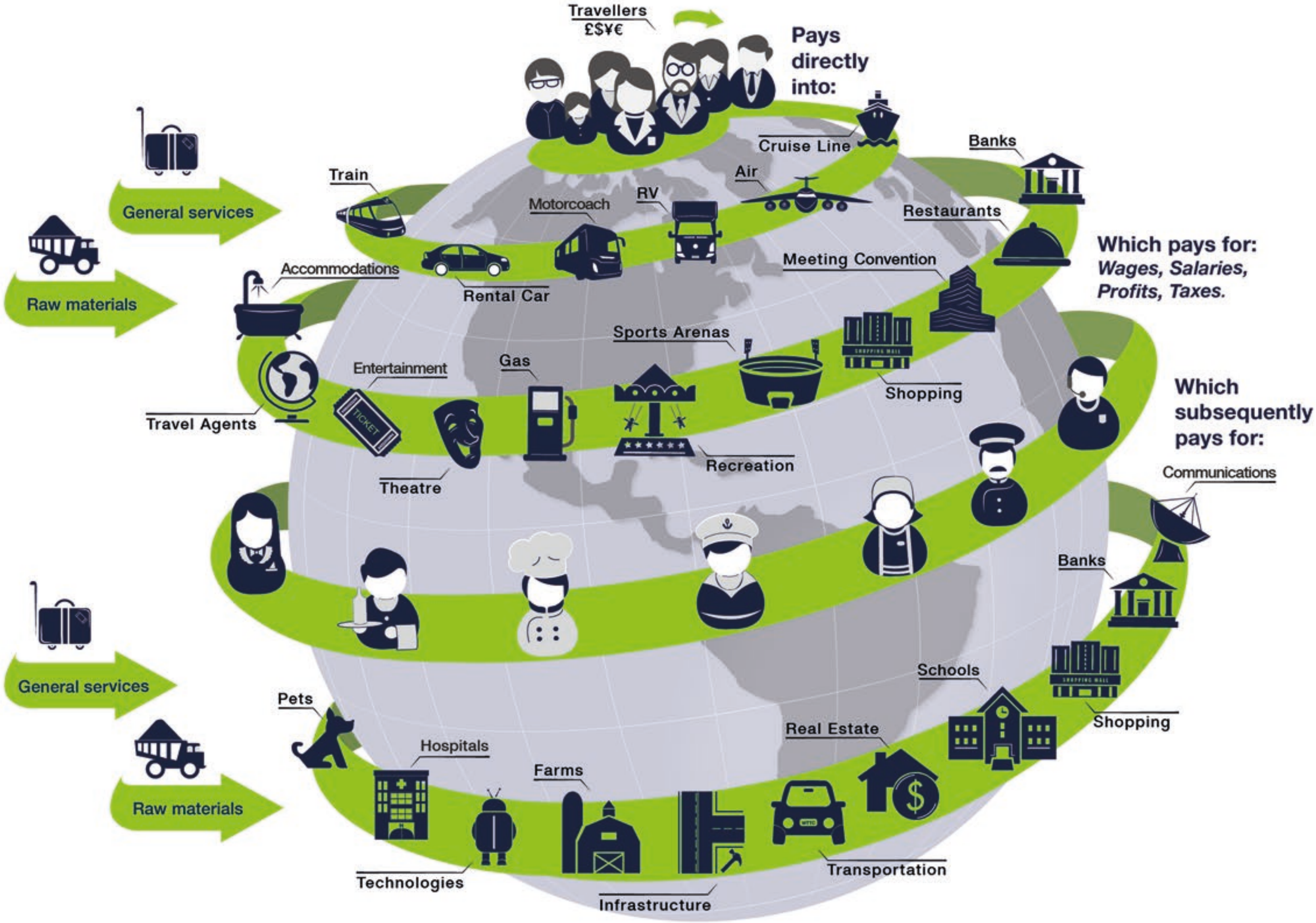
TRAVEL PAYS

HOW MONEY TRAVELS



WORLD TRAVEL & TOURISM COUNCIL

THE AUTHORITY ON WORLD TRAVEL & TOURISM

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