

Africa's Competitiveness In The Global Economy and The Tourism Sector

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Abstract

Africa's achievements in tourism revenues and tourists arrivals must be understood in the context of the continent's relatively unexploited tourism potential. Africa still accounted for only 3.4 percent of global tourism receipts and 5.2 percent of tourist arrivals, despite accounting for almost 15% of the world's population. Although Travel and Tourism (T&T) sector provides many benefits, numerous obstacles at the national level have continued to hinder its development. The obstacles include: Improving safety, and security, upgrading health and hygiene levels, developing infrastructure and access to African sites, and fostering the region's human capital. Given the well understood potential for a growing national T&T sector to contribute to employment, raise national income, and reduce poverty, Africa still has ample opportunity to boost its ability to fully reap the benefits the sector offers. The Travel and Tourism competitiveness index (TTCI) is a comprehensive index that aims to measure the factors and policies that make it attractive to develop the T&T sector in different countries. The composition of the sub-indexes which could have contributed to the sectors full potential are government policy regulated. The business environment and infrastructure are not favorable to the tourists. Africa's Travel and Tourism competitiveness is presented for thirty-five African countries in 2009 and 2011. Tunisia is the top-ranked African country at 47th position, followed closely by Mauritius at 53rd and South Africa at 66th. They clearly set themselves apart as the top African performers in T&T competitiveness. Tunisia and Mauritius are outperformed in the TTCI only by China and Brazil among the comparators shown, and have scores not far behind that of Brazil. The paper compares such competitiveness with countries in Asia and the BRIC countries, (Brazil, Russia, India and China). It is argued that Tourism is a major earner of foreign exchange through international receipts and expenditures which are presented for the global top-ten countries. No African country featured among the top ten countries globally. The paper concludes that Africa's Tourism sector has the potential which if properly explored would enhance Africa's competitiveness in the global economy.

Key Words: Africa, Competitiveness, Globalization, Economy, Travel and Tourism

This paper sets out to explore Africa, and indeed Nigeria, as they are battling with re-branding their economies in order to be globally competitive. With Nigeria's over 75% revenue from oil, it is imperative to embark on a long term strategy to recognize oil as a depleting asset and

Introduction

devise other diversification strategies without which the future generation will face dire economic challenge. Tourism should be seen as one of the world's largest industries and one of its fastest growing economic sectors which should be explored.

Tourism, as an instrument for regional development for many countries, stimulates new economic activities such as Hospitality Industries, Travel Agencies and infrastructural developments. [13] has described tourism as a veritable way of making people to know about the rich cultural diversity of the people in addition to the rich cultural heritage of the country. Tourism has positive economic impacts on the balance of payments, employment, gross income and production.

This paper looks at Africa's Travel and Tourism competitiveness as presented for thirty-five African countries in 2009 and 2011 and then compares such competitiveness with countries in Asia and the BRIC countries. The conceptual framework is followed by Africa's Travel and Tourism Competitiveness and Travel & Tourism Competitiveness Index (TTCI). Africa's Comparative Travel and Tourism (T&T) competitiveness closely follows globalization and global tourism including tourism arrivals, tourism receipts and expenditures. The analysis of global tourism statistics is followed by the conclusion and recommendations of the paper.

The objectives are:

- a) To compare Africa's Competitiveness with the BRIC countries (Brazil, Russia, India and China).
- b) To examine the global Top Ten Countries in the areas of the most visited countries, International Tourist arrivals, Tourists receipts and expenditures, and the most visited Cities.
- c) To analyze global Tourism statistics and make recommendations for enhancing Africa's Tourism Competitiveness.

Conceptual Framework

When people leave their homes and environments to travel for some days or short durations to near or far off places for resting or relaxing on beaches, surfing, paragliding, mountain climbing, visiting

historical places or centers for medical treatment and other purposes, it is called tourism. Such stays are normally for a month at the maximum. For many years the tourism sectors together with their economic and social significance were over looked. In the words of [5], this is being rectified. Governments have increasingly recognized the economic importance of tourism and imposed a broad range of new taxes that have significantly added to the cost of travel from tourist perspective. Tourists have increasingly scrutinized all forms of tourism developments so as to ensure that their environmental and social impacts are acceptable. Globally, today's generation of young people are more informed, more mobile, and more adventurous. [12], has stated that youth travel has been recognized by UNWTO as one of the fastest growing and most dynamic markets of the global tourism sector.

According to the [8] Africa's rich natural and cultural resources represent a major unexploited endowment through Travel and Tourism. The sector has the potential to operate significant employment, growth and poverty reduction. Tourism sector is a very important industry and a life blood for many countries, because it provides a vital source of foreign exchange for sustenance. It is important to note that African region has many advantages on which to build tourism industry, price competitiveness, strong affinity for tourism and natural resources by efforts toward environmental sustainability.

There are also a number of obstacles in developing the tourism sector. These include: Improving safety, and security, upgrading health and hygiene levels, developing infrastructure and access to African sites, and fostering the region's human capital.

[3], have pointed out that, although Travel and Tourism (T&T) sector provides many benefits, numerous obstacles at the national level have continued to hinder its

development. In their opinion, businesses and governments could address national-level challenges to the sectors growth.

Africa's Travel And Tourism Competitiveness

Africa's achievements in tourism revenues and tourists arrivals must be understood in the context of the continent's relatively unexploited tourism potential. Indeed, according to the United Nations World Tourism Organization (UNWTO), in 2010 Africa still accounted for only 3.4 percent of global tourism receipts and 5.2 percent of tourist arrivals, despite accounting for almost 15% of the world's population. Given the well understood potential for a growing national T&T sector to contribute to employment, raise national income, and reduce poverty, Africa still has ample opportunity to boost its ability to fully reap the benefits the sector offers.

The rapidly unfolding changes in destinations, particularly across North Africa, may lead to new spurts of tourism demand as countries move from a focus on leadership changes to concerted efforts to strengthen economies. This arena is anticipated to provide abundant occasions for Travel & Tourism to demonstrate its resilience, (able to recoil or spring back). As a growing component of the broad services sector, Travel & Tourism has a vital role to play in enabling export diversification and attracting foreign direct investment (FDI).

[3], have identified the pillars that will contribute to the sector achieving its full potential. These pillars are available in Figure 1.0 below

Travel & Tourism Competitiveness Index (Ttci)

The Travel and Tourism competitiveness index (TTCI) is a comprehensive index that aims to measure the factors and policies that make it

attractive to develop the Travel and Tourism (T&T) sector in different countries. From the Figure 1.0 below, there are three types of Sub-indexes:

Figure 1.0: Composition of the three sub-indexes of the TTCI

- 1) Sub-index A:
Travel And Tourism (T&T) Regulatory Framework
 Health and hygiene
 Safety and security
 Environmental sustainability
 Policy rules and regulations
 Prioritization of Travel & Tourism
- 2) Sub-index B:
T&T Business Environment And Infrastructure
 ICT infrastructure
 Tourism infrastructure
 Ground transport infrastructure
 Air transport infrastructure
 Price competitiveness in the T&T industry
- 3) Sub-index C:
T&T Human, Cultural, And Natural Resources
 Human resources
 Affinity for Travel & Tourism
 Cultural resources
 Natural resources

Source: World Economic Forum, 2011.

Figure 1.0 above summarizes the structure of the overall Index, showing how the 14 pillars are allocated within the three sub-indexes. The first sub index captures those elements that are policy related and generally under the purview of the government; the second sub-index captures elements of the business environment and the infrastructure of each economy; and the third sub-index captures the human, cultural, and natural elements of each country's resource endowments

Africa's Comparative Travel And Tourism (T&T) Competitiveness

Table 1.0: Travel & Tourism Competitiveness Index
2011 and 2009 comparison

Country/Region	TTCI 2011		TTCI 2009	
	Rank*	Score	Rank†	Score
China	39	4.5	47	4.5
Tunisia	47	4.4	44	4.4
Brazil	52	4.4	45	4.4
Mauritius	53	4.4	40	4.4
Russian Federation	59	4.2	59	4.2
<i>Southeast Asian average</i>				4.2
South Africa	66	4.1	61	4.1
India	68	4.1	62	4.1
<i>Latin American & Caribbean average</i>				4.0
Egypt	75	4.0	64	4.0
Morocco	78	3.9	75	3.9
Namibia	84	3.8	82	3.8
<i>North African average</i>				3.8
Cape Verde	89	3.8	n/a	3.8
Botswana	91	3.7	79	3.7
Gambia	92	3.7	87	3.7
Rwanda	102	3.5	n/a	3.5
Kenya	103	3.5	97	3.5
Senegal	104	3.5	101	3.5
Ghana	108	3.4	110	3.4
Tanzania	110	3.4	98	3.4
Zambia	111	3.4	100	3.4
Algeria	113	3.4	115	3.4
Uganda	115	3.4	111	3.4
Swaziland	116	3.4	n/a	3.4
<i>Sub-Saharan African average</i>				3.3
Zimbabwe	119	3.3	121	3.3
Benin	120	3.3	120	3.3
Malawi	121	3.3	117	3.3
Ethiopia	122	3.3	123	3.3
Libya	124	3.2	112	3.2
Cameroon	126	3.2	125	3.2
Madagascar	127	3.2	116	3.2
Mozambique	128	3.2	124	3.2
Nigeria	130	3.1	128	3.1
Côte d'Ivoire	131	3.1	130	3.1
Burkina Faso	132	3.1	126	3.1
Mali	133	3.0	119	3.0
Lesotho	135	3.0	132	3.0
Mauritania	136	2.8	127	2.8
Burundi	137	2.8	131	2.8
Angola	138	2.8	n/a	2.8
Chad	139	2.6	133	2.6

Sources: World Economic Forum, 2009, 2011; authors' calculations.

* Out of 139 economies

† Out of 133 economies

Table 1.0 above compares the performance of the 35 African countries in 2009 and 2011 editions of the TTCI, as well as the averages for North Africa and sub-Saharan Africa. To put the analysis into an international context, the Index also includes a number of comparator economies. These include the averages of two relevant developing regions—Latin America and the Caribbean and Southeast Asia - as well as the ranks and scores of the four rapidly developing and large BRIC countries—Brazil, Russia, India, and China. For each country, the table presents the rank out of the 139 economies covered in the 2011 TTCI (with 1 being the highest rank and 139 being the lowest), as well as the scores on a scale of 1 to 7 (with scores closer to 7 representing stronger performances). Country rankings from the TTCI 2009 are provided for comparison. The table shows that the North African and sub-Saharan African averages are outperformed by the other two regional averages as well as by all four of the BRIC economies, although North Africa outperforms sub-Saharan Africa by a wide margin. Yet, as the table also shows, individual African countries perform comparatively well.

In the global rankings reflecting 2010 activity, Tunisia is the top-ranked African country at 47th position, followed closely by Mauritius at 53rd. They are outperformed in the TTCI only by China and Brazil among the comparators shown, and have scores not far behind that of Brazil. In addition, they outperform all other countries and regions shown in the table. Tunisia and Mauritius are joined in the top half of the overall rankings by only one other country, South Africa. Although South Africa is outperformed by Russia, it is ahead of India and all of the regional averages. These three countries thus clearly set themselves apart as the top African performers in T&T competitiveness.

Egypt, Morocco, and Namibia constitute a second cluster of African countries, which are below the Indian, Southeast Asian, and Latin American averages but ahead of the North African average and well ahead of the performance of most sub-Saharan African countries.

Three other African countries place within the top 100 of the rankings: Cape Verde, Botswana, and Gambia. These sub-Saharan African countries outperform the North African countries of Algeria and Libya, as well as the large majority of countries in their own region. Future review of the impact of recent events in countries across northern Africa will undoubtedly contribute to shifts in these rankings.

All other African countries in the table are below the 100 mark, and although several of them are above the sub-Saharan African average, it is important to note that this is a very low benchmark, with the average for all countries in this region placing somewhere between the 116th and 119th ranks out of 139 economies. Africa has some strong performers. Yet most countries receive poor assessments according to the TTCI. It is critical to note that these aggregate numbers mask important strengths among individual economies within the individual pillars of the Index, and upon which they could build stronger T&T industries.

Globalization

Globalization, according to [1] is basically a process of greater integration of world economies through increasing free flow of goods, services, capital, information, ideas and people. [9], have said that globalization involves the closer integration of world economies especially in the areas of trade and finance.

3.1: Global Tourism

Tourism is one of the world's fastest growing industries and an important source of foreign exchange and

employment for many developing countries such as many African countries. It has been referred to as an industry responsible for traveling for leisure and relaxation, pleasure, sightseeing, visiting, or going to places of interest and attraction. According to [6], tourism is related to travel package which include moving from one location to another by air, road, sea, rent cars and ships by help of travel industries. In the author's opinion, tourism is inseparable from hospitality. Tourism has also been described as a marketing industry which has close relationship with hospitality industry. [14], has said that tourism and hospitality is the fastest growing industry in the world with over 72.4 million jobs within the industry.

This paper is of the view that Tourism is the current trend by which nations are growing very fast and benefiting from it. It is important to note that development of tourism leads to growth in hospitality industry (these are hotels, motels and inns).

According to [13], The Golden Beach Hotels which is one of the biggest indigenous hotel chains in Ghana,

welcomed over 30,000 Nigerians and these have contributed over N80 million to Ghanaian economy.

The Meridien Ibom Hotel and Golf Resort, in Uyo, Akwa Ibom State is fast redefining Hospitality and Tourism business in the South-South region of Nigeria. It is located on the fringe of Nwaniba beach, a serene coastal community in Uruan; it is a wonderland that needs to be exploited. The multi-million Naira magnificent hotel complex sitting on a vast expanse of land is of international standard and an architectural masterpiece. [13], has stated that Nigerian golfers in Diaspora under the aegis of Nigeria UK Golfing Association (NUGA) chose this place for its "Homecoming 2009". This was a historic event, as the golfers in Diaspora and the golfers in Nigeria explored and patronized the use of this place for their competition.

Most Visited Countries

The ten countries leading in tourism in the world are: France, Spain, USA, China, Italy, UK, Germany, Ukraine, Turkey and Mexico, [2]. The Table below shows the most visited countries.

TABLE: 2.0: Most visited countries by international tourist arrivals

Rank	Country	UNWTO Regional Market	International tourist arrivals (2009)	International tourist arrivals (2010)	%
1	France	Europe	76.8 million	76.8 million	+0.0%
2	United States	North America	55.0 million	59.7 million	+8.7%
3	China	Asia	50.9 million	55.7 million	+9.4%
4	Spain	Europe	52.2 million	52.7 million	+1.0%
5	Italy	Europe	43.2 million	43.6 million	+0.9%
6	United Kingdom	Europe	28.2 million	28.1 million	-0.2%
7	Turkey	Europe	25.5 million	27.0 million	+5.9%
8	Germany	Europe	24.2 million	26.9 million	+10.9%
9	Malaysia	Asia	23.6 million	24.6 million	+3.9%
10	Mexico	North America	21.5 million	22.4 million	+4.4%

Source: Pepple, Noble (2012). Tourism and Economic Development: Prospects and challenges in non-oil economy.

From Table 2.0: above, the ten most visited countries by international tourist arrivals are France, United States, China, Spain, Italy, United Kingdom, Turkey, Germany, Malaysia and Mexico in that order in 2009 and 2010. France had the highest number of tourist arrivals in both 2009 and 2010, (76.8 million for each of the year). This was followed by the United States with 55.0 and 59.7 million for 2009 and 2010 respectively. The least of these ten most visited tourist countries is Mexico which is in North America with 21.5 and 22.4 millions for both 2009 and 2010 respectively. Africa was not among these first ten most visited countries by international arrivals. It might interest us to ask why Africa is not among these countries when we have so many cultural activities that could attract visitors quarterly or yearly to our continent. [7], have specified that for many tourist destinations around the world, it is their attractions that often serve as the catalyst

for tourists visits. They further have stated that attractions provide a single most important reason for leisure tourism to a destination.

Africa has enough attractions that should be attractive to our visitors. These include our indigenous textiles especially the hand-crafted ones such as Akwete which are woven by Akwete Ndoki in Abia State. For centuries, these products have been secretly made and produced, just like the pottery makers of Ile Dada; strangers are not welcomed in these businesses. They are said to live in a closed society that protects their craft secretes. [10], has stressed that this is not the right way of doing things. The world is fast becoming a global village and as such, clinging to ones little ideas or business are becoming outdated. It is therefore important to be open minded so as to discourage the feeling that ‘we are different’.

International Receipts

Table 3.0: Interational Tourism Receipts

Rank	Country	UNWTO Regional Market	International Tourism Receipts (2011)
1	United States	North America	\$116.3 billion
2	Spain	Europe	\$59.9 billion
3	France	Europe	\$53.8 billion
4	China	Asia	\$48.5 billion
5	Italy	Europe	43.0 billion
6	Germany	Europe	38.8 billion
7	United Kingdom	Europe	35.9 billion
8	Australia	Oceania	31.4 billion
9	Macao (China)	Asia	27.8 billion (2010)
10	Hong Kong (China)	Asia	27.2 billion

Source: Pepple, Noble (2012). Tourism and Economic Development: Prospects and challenges in non-oil economy.

From the Table 3.0 above, United States which is in North America has a record of \$116.3 billion as its international tourism receipts. Spain trailed behind the

United States with 59.9 billion tourism receipts. Hong Kong on the other hand, had the least international tourism receipts of 27.2 billion. All of these activities

happened in the year, 2011. And again, Africa is not among the list of these first

ten countries with international tourism receipts in 2011.

3.4: International Tourism Expenditures

Table 4.0: International Tourism Expenditures

Rank	Country	UNWTO Regional Market	International Tourism Expenditures (2010)
1	Germany	Europe	\$77.7 billion
2	United States	North America	\$75.5 billion
3	China	Asia	\$54.9 billion
4	United Kingdom	Europe	\$48.6 billion
5	France	Europe	\$39.4 billion
6	Canada	North America	\$29.5 billion
7	Japan	Asia	\$27.9 billion
8	Italy	Europe	\$27.1 billion
9	Russia	Europe	\$26.5 billion
10	Australia	Oceania	\$22.5 billion

Source: Pepple, Noble (2012). Tourism and Economic Development: Prospects and challenges in non-oil economy.

[15], defines expenditure as the amount of money spent. As we look at Table 4.0 above, we would see the amount of billions of Dollars spent by tourists in 2010 in various countries. The country that got the most was Germany - \$77.7 billion followed by Unites States of America with the international tourism expenditure. It is about \$75.5 billion. Australia has the least of these expenditures in its country with a total of \$22.5 Billion in 2010. No African country is on the list of these top ten countries of the world with international tourism expenditures.

What tourism facilities in these tourism sectors are they spending on? What are actually attracting the tourists? These are some of the questions we need to ask ourselves so that we can improve on our own tourism sectors.

It is important to note that the Federal Government of Nigeria recently announced that it would need about N3

trillion to rebrand Nigeria in the area of tourism. This figure, to many people, sounds colossal (extremely large) in the midst of economic depression, but a closer look at the Table above, could tell that this amount is nothing to compare with what will put Nigeria and in particular, the African continent in the competitive world market. In other words, the huge amount to rebrand the country may not have much effect like a concerted effort to put an African country such as Nigeria in the global map through tourism. Tourism is a veritable way of making people to know about the rich cultural diversity of the people, coupled with rich cultural heritage of the country.

Africa and indeed Nigeria are richly and magnificently endowed with tourism assets which when developed, could make Nigeria a foremost tourist destination in Africa

Most Visited Cities

Table 5.0: Most – Visited Cities By International Tourist Arrivals

Rank	City	Country	International visitors (millions)	Year/Notes
1	Paris	France	15.6	2011 (Extrapolation, excluding outer suburbs visitors)
2	London	United Kingdom	15.2	2011
3	Antalya	Turkey	10.5	2011(May include same-day visitors)
4	New York City	United States	10.3	2011(Projection, may include same-day visitors)
5	Singapore	Singapore	9.2	2010 (Excluding Malaysian citizen arriving by land)
6	Kuala Lumpur	Malaysia	9.0	2011 (Only hotel guests)
7	Hong Kong	Hong Kong (China)	8.7	2011 (Excluding Mainland Chinese Visitors)
8	Dubai	United Arab Emirates	8.1	2011 (Only hotel and hotel apartment guests)
9	Istanbul	Turkey	8.1	2011 (May include same-day visitors)
10	Bangkok	Thailand	7.2	2010

Source: Pepple, Noble (2012). Tourism and Economic Development: Prospects and challenges in non-oil economy.

The Table 5.0 above shows the most visited cities by international tourist arrivals. When we look at the Table closely, we see that the most visited city is Paris with 15.6 million tourists. This was closely followed by London which recorded 15.2 million visitors in 2011. These are large numbers of visitors. Bangkok in Thailand has the least of the visitors with a record of 7.2 visitors in 2010. No African county is listed among these top ten cities. We need to work very

hard in our tourism sector to be able to put Africa in the top ten of tourism world map.

Analysis Of Global Tourism Statistics

The global tourism statistics have made it clear that tourism is important and in some cases vital for the socioeconomic and political prosperity of many countries of the world.

- In 2011 alone, there were over 982 million international tourist arrivals worldwide, representing a growth of 4.6% when compared to 2010.
- International tourism receipts (the travel item of the balance of payments) grew to US\$1.03 trillion in 2011, corresponding to an increase in real terms of 3.8% from 2010.
- In 2011, international travel demand continued to recover from the

losses resulting from the late 2000s recession, where tourism suffered a strong slowdown from the second half of 2008 through the end of 2009

- After a 5% increase in the first half of 2008, growth in international tourist arrivals moved into negative territory in the second half of 2008, and ended up only 2% for the year, compared to a 7% increase in 2007.

- The negative trend intensified during 2009, exacerbated in some countries due to the outbreak of the H1N1 influenza virus, resulting in a worldwide decline of 4.2% IN 2009 to 880 million international tourist arrivals, and a 5.7% decline in international tourism receipts.

Tourism brings in large amounts of income in the form of payments for goods and services, and often times the payments go directly to the people that might not have found the opportunity to participate in mainstream economic activities. Tourism accounts for 30% of the world's exports of services, and 6% of overall export of goods and services.

The service industries such as transportation services (e.g. airlines, cruise ships and taxicabs); hospitality services (such as accommodations, including hotels and resorts); and part of the entertainment industry (such as amusement parks, casinos, shopping malls, music venues and theaters) are very closely dependent on tourism.

It is very important that we take the business of tourism most seriously, crude oil or no crude oil. The world tourism organization (WTO) has identified the top ten counties most visited in terms of the number of international travelers. In 2010, China overtook Spain to become the third most visited country.

Conclusion

Africa's Travel and Tourism competitiveness was presented for thirty-five African countries in 2009 and 2011. The paper compared such competitiveness with countries in Asia and the BRIC countries. It argued that Tourism is a major earner of foreign exchange through international receipts and expenditures which were presented for the global top-ten countries. Africa's Tourism receipts were also compared with other regions of the world. No African county featured among the top ten countries globally. We therefore conclude that Africa's Tourism sector has the potential which if properly explored would enhance Africa's competitiveness in the global economy.

Recommendations

i) African countries should make Tourism and Hospitality industry a priority Sector for

the purpose of attracting foreign direct investment (FDI) and earning foreign exchange.

ii) The Tourism industry should be managed within a regulatory framework that classifies Hotels, Parks, Restaurants, and Recreational Centers according to International Standards.

iii) Our Institutions of higher learning should involve in training and retraining programs to enhance the capacity of personnel in the Tourism and Hospitality industry.

iv) State Governments and Corporate bodies should invest in the identified Tourism potentials of particular States in Nigeria

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