



# The Housing Industry in Ghana



# Bank of Ghana

The Tourism Industry and the Ghanaian Economy

Prepared by Research Department  
May 2007

**The Sector Study reports are prepared by the Research Department of Bank of Ghana for the deliberations of the Bank's Board of Directors. The reports are subsequently made available as public information.**

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# 1. INTRODUCTION

The tourism industry has contributed significantly to the country's economy, particularly in recent times, as the sector continues to demonstrate its potential as a key driver of growth. For example, between 2000 and 2005, visitor arrivals and spending increased by 46 per cent and 68 per cent respectively. The industry is currently the third largest foreign exchange earner after merchandise exports and remittances from abroad and has become one of the most important and fastest growing sectors of the Ghanaian economy. Tourism receipts are forecasted to reach \$1.5 billion by end 2007.

Government has therefore earmarked the sector as a major potential source of foreign exchange, which needs to be tapped. According to a strategy document designed and being implemented by the Ministry of Tourism and Diasporan Relations (MTDR) for the period 2003–2007, the target for the sector by the end of 2007 include:

- a projected increase in tourist arrivals to one million people.
- making tourism the largest employer after agriculture and retailing, and also the largest employer in the formal sector with 300,000 jobs.
- increasing tourism forex earnings to US\$1.5 billion per annum.
- establishing Ghana as the "homeland" for Africans in the Diaspora.

The aim of this paper is to assess the extent to which these objectives could be achieved, and to suggest measures to enhance the achievement of these goals.

A review of the existing literature on the tourism industry in Ghana was done, and consultations and discussions were held with stake-holders in the sector. A field survey was also conducted at selected tourist sites, and operators as well as tourists were consulted to ascertain their views on specific policy areas relating to the growth of the industry.

For the purposes of this study, tourism is defined as activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

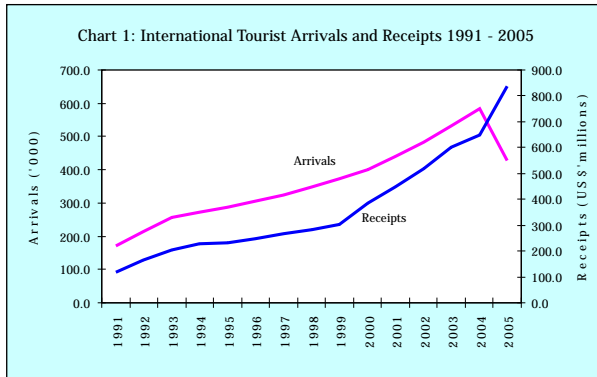
The study is presented in five sections. The next section (section 2) gives a review of performance trends in the tourism industry. Section 3 presents findings from a field survey conducted to ascertain first hand views of players in the industry while section 4 outlines the various measures at promoting tourism industry in Ghana. Section 5 concludes with some policy recommendations.

## 2. AN OVERVIEW OF PERFORMANCE TRENDS IN THE TOURISM INDUSTRY IN GHANA

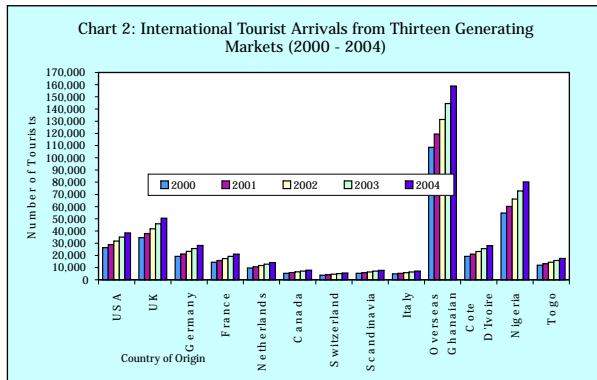
### 2.1 TOURIST ARRIVALS, RECEIPTS AND TOURISM RELATED EMPLOYMENT

International tourist arrivals and receipts have shown steady and positive trends since 1991, except for a slight dip in arrivals in 2005 (as shown in Chart 1). Tourist arrivals increased from 172,000 in 1991 to 429,000 in 2005. This was a significant increase, even though, considering the target of 1,000,000 by 2007, which was set in the Tourism Strategy of the Ministry of Tourism and Diaspora Relations, a lot of effort is required to ensure a doubling of the arrival figures in the next two years. Yet still, a close look at the country of origin of tourists from thirteen generating markets (see Chart 2) indicates that there were consistent upward trends in arrivals irrespective of origin. The figures also show that sources in the ECOWAS sub-region accounted for the largest share, representing 60 per cent (inclusive of overseas Ghanaians), with the remaining 40 per cent from countries outside Africa (see Chart 3). The importance of regional sources, as indicated by these figures, implies that policies towards improving the number of tourist arrivals must give attention to regional incentives.

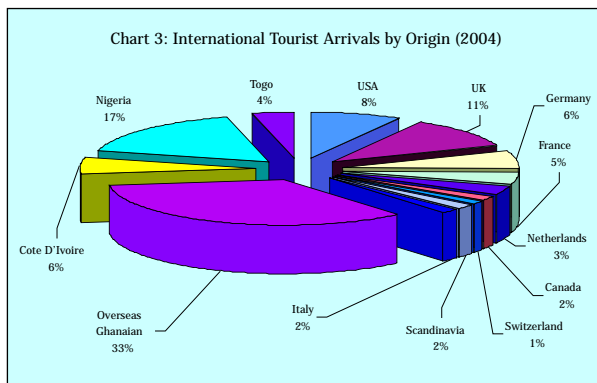




Source: Ghana Tourist Board



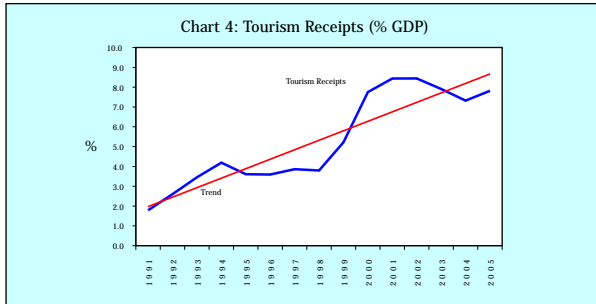
Source: Ghana Tourist Board



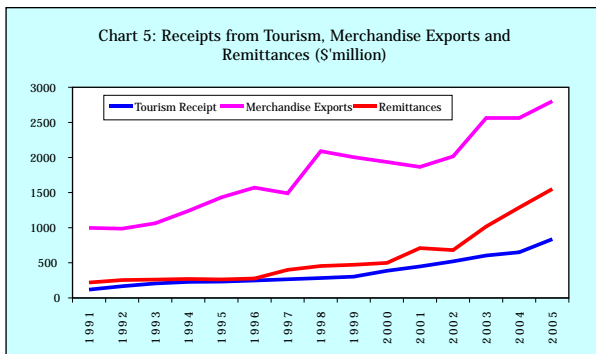
Source: Ghana Tourist Board

The general upward trend in tourism receipts was not affected by the fall in arrivals (as exhibited in Chart 1). Receipts from tourism increased from \$118.0 million (1.8% of GDP) in 1991 to \$836.0 million (7.8% of GDP) in 2005, which is about half way to the targeted \$1.5 billion receipts by 2007. However, GDP share of receipts from tourism followed a cyclical pattern from 1992 to 2005 (with the 2004 dip ascribable to the fall in arrivals), even though the general trend has followed an upward movement (see Chart 4).

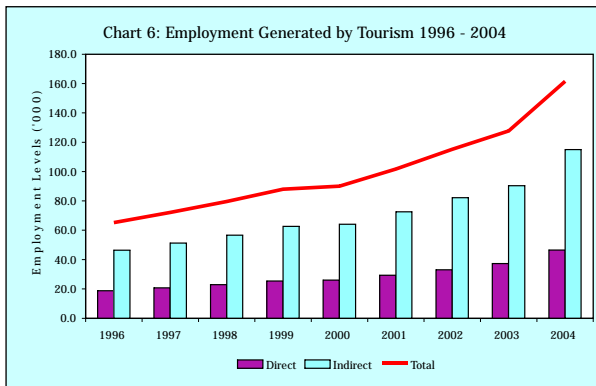
A comparison of foreign exchange receipts from tourism with other sources such as merchandise exports and remittances shows that the sector is holding its own, contributing about half of total remittances and a third of foreign exchange receipts from merchandise trade. The tourism sector is also providing employment in both direct and indirect ways to a significant number of Ghanaians. For example, according to figures obtained from the Ghana Tourist Board (see Appendix 4 and Chart 5), tourism provided about 19,000 direct jobs and 46,000 indirect jobs in 1996. These figures rose to about 47,000 direct jobs and 115,000 indirect jobs in 2004. These indicators imply that tourism related jobs have more than doubled in less than ten years.



Source: Ghana Tourist Board



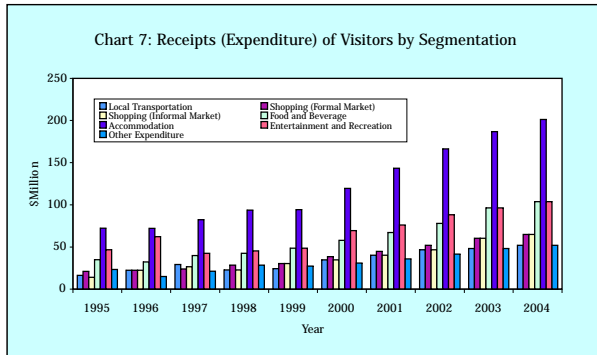
Source: Ghana Tourist Board



Source: Ghana Tourist Board

Another important aspect of tourism receipts relates to the distribution of expenditure by tourists among the various segments of the industry. Chart 7 illustrates tourists' expenditure in the various segments of the industry from 1995 to 2004. The figures for 2004 indicate that expenditure on accommodation ranked first in tourists' expenses, followed by a tie position by the Entertainment & Recreation and Food & Beverage categories; the two Shopping categories; Local Transportation and Other Expenditures respectively. A closer look at the Chart also reveals that, whereas Accommodation remained the topmost recipient of tourists' expenditures throughout the sample period (receiving an average of about 31.3% of the total expenditures), Food and Beverage improved from a lower level (15.3%) in 1995 (compared to 20.4% to Entertainment and Recreation) to equate that of Entertainment and Recreation in 2003-2004 period (16% and 16.2% respectively). Similar expenditures on shopping in the Informal Markets improved from 6.1 per cent in 1995 (compared to 9.1 % on Formal Markets) to about 10.1 per cent in 2005 (the same figure for the Formal Market in 2005).

The implications of these indicators for local industries are that, there have been some improvements in the interests of tourists on products in the informal markets and for local food and beverages in recent times. Nevertheless, more needs to be done to improve the patronage of local transportation by tourists.



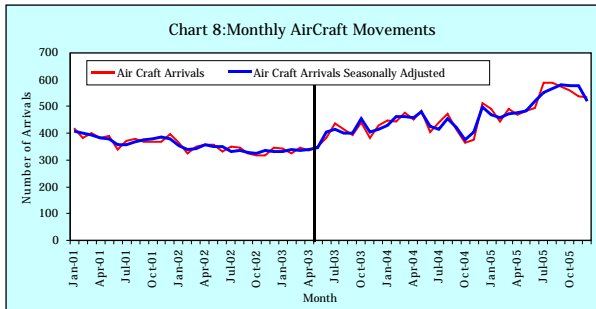
Source: Ghana Tourist Board

## 2.2 AIRCRAFT AND FREIGHT MOVEMENTS AND PASSENGER ARRIVALS

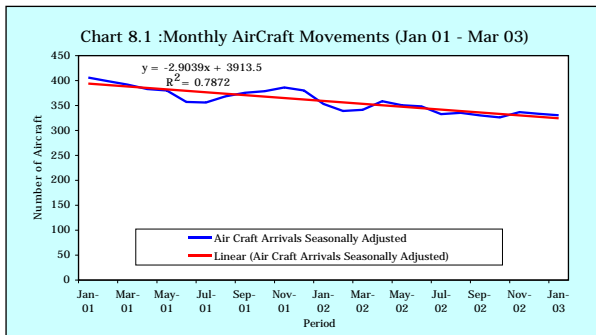
As a way of further assessing the performance of the tourism industry, we tracked the performance of selected tourism related indicators to see evidence of any significant shift in the data (see Appendix 18 for the trend estimation results). A cursory look at Chart 8 reveals an upward trend in aircraft movements from 2001 to 2005. However, the period before April 2003 recorded a fall in the average growth rate of 0.53 per cent (-0.68 per cent for the seasonally adjusted growth) while the period after, realised a positive average growth of 1.82 per cent (1.61 for the seasonally adjusted growth). Charts 8.1 and 8.2 illustrate this parametric shift in trend.

Similar developments can be seen in terms of Freight movement as depicted by Chart 9. There was a negative average growth rate of 0.95 per cent from January 2001 to March 2003 (-0.76 per cent seasonally adjusted growth). On the other hand, there was a positive growth of 6.47 per cent for the period April 2003-December 2005 (3.95 % for seasonally adjusted growth). This shift is shown in Chart 9.1 and Chart 9.2.

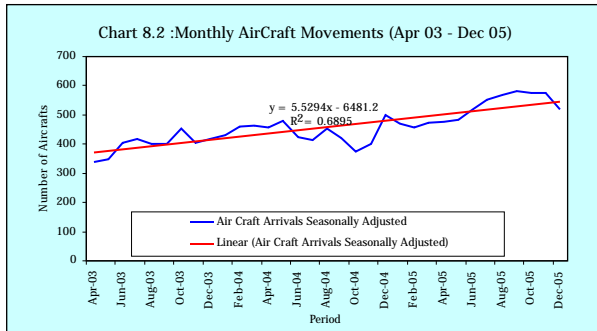
In contrast to the observations for aircraft and freight movements, as shown in Chart 10, the growth in the number of passengers was positive for the whole period. This is consistent with the trend in the number of tourist arrivals noted in Chart 1. Passenger arrivals recorded a positive growth of 1.16 per cent (albeit -0.15 % for Seasonally adjusted growth) for the period before April 2003; and 2.01 per cent (1.10 % for seasonally adjusted growth) for the period April 2003 - December 2005. Yet, Charts 10.1 and Chart 10.2 indicate a slight shift in the gradient of the trend.



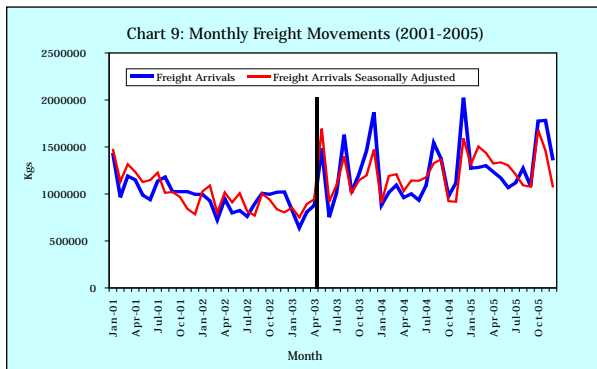
Source: Ghana Civil Aviation Authority



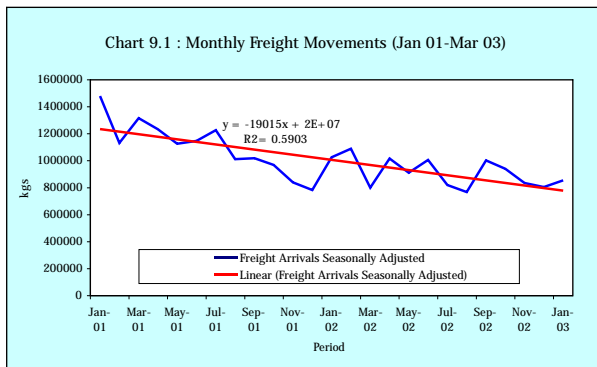
Source: Ghana Civil Aviation Authority



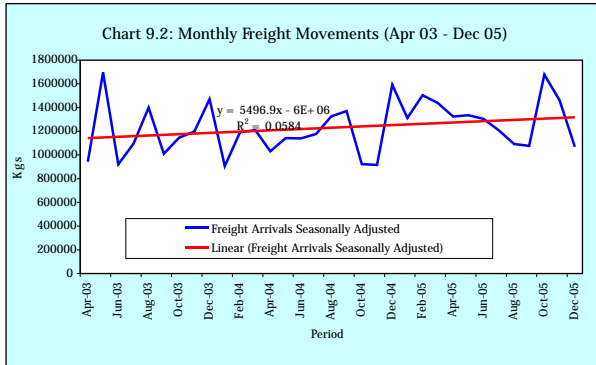
Source: Ghana Civil Aviation Authority



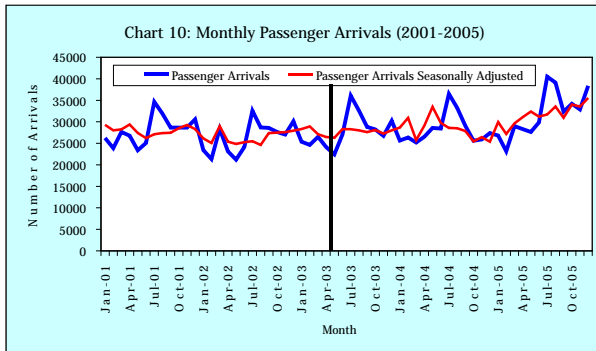
Source: Ghana Civil Aviation Authority



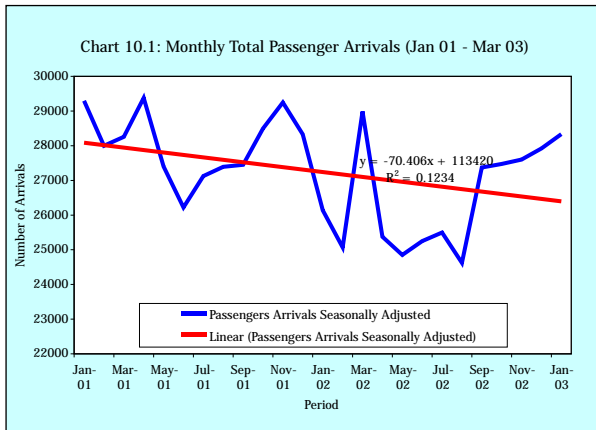
Source: Ghana Civil Aviation Authority



Source: Ghana Civil Aviation Authority

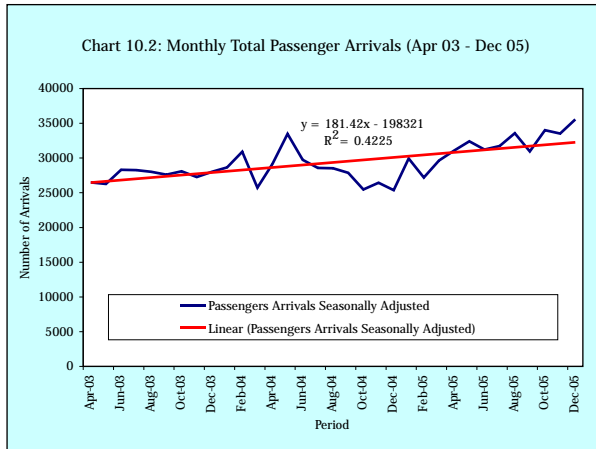


Source: Ghana Civil Aviation Authority



Source: Ghana Civil Aviation Authority





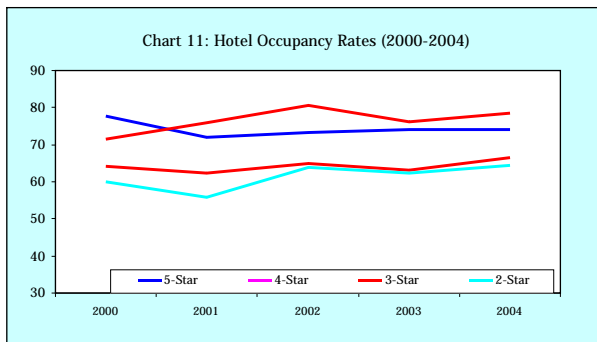
Source: Ghana Civil Aviation Authority

### 2.3 TOURIST INFRASTRUCTURE

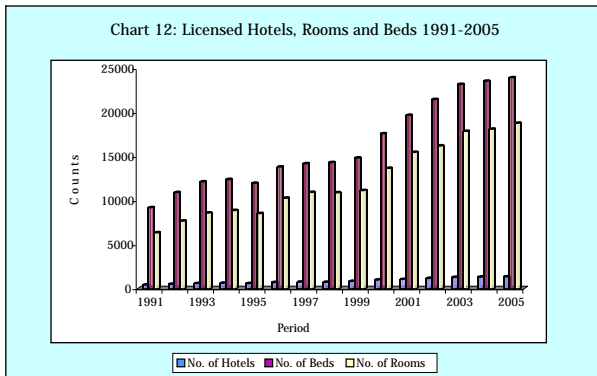
Tourism is a competitive industry that requires a good mix of attractions and support facilities to ensure a sustainable tourism industry. Some of the facilities and services required to meet the needs of tourists include, accommodation services; food and beverage services; transportation, services by travel agents, tour operators, and tourist guides; recreation and entertainment services such as the performing arts, museums, botanical and zoological gardens, nature reserves and wildlife preservation services; sports and recreation services such as golf and race circuits, recreational parks and beaches, amusement park services, carnivals and casino services; and other miscellaneous services such as banking and insurance services, rental and leasing services, trade fairs and exhibitions, spa services, and tourist information services etc. These are discussed below.

- Accommodation

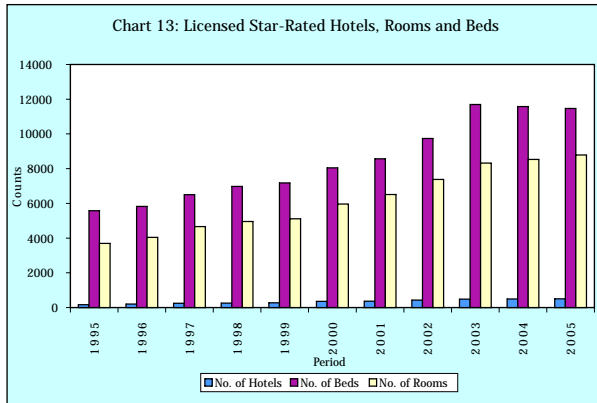
Accommodation is an essential component of tourism since it involves a stay away from home. Accommodation services are wide-ranging and includes hotel and motel lodging services, letting services of furnished accommodation, youth hostel services, children's training and holiday camp services, camping and caravanning site services, sleeping car and similar services and residence of students.



Source: Ghana Tourist Board



Source: Ghana Tourist Board



Source: Ghana Tourist Board

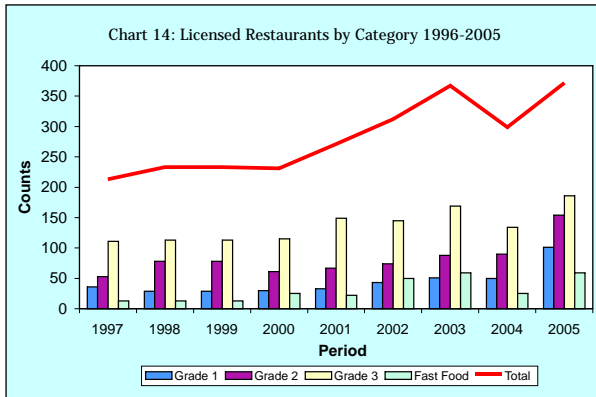
As seen in Chart 13, the number of hotels, rooms and beds have increased significantly between 1991 and 2005. The number of hotels increased from 419 in 1991 to 1345 in 2005, which showed an average annual growth of 9.7 per cent. The number of hotel rooms also increased from 6,339 in 1991 to 18,752 in 2005, showing an average annual growth of 8.6 per cent. The number of beds increased from 9,189 in 1991 to 23,924 in 2005, showing an average annual growth of 7.7 per cent.

The number of star-rated hotels also increased from 168 in 1995 to 504 in 2005 showing an average annual growth of 11.9 per cent. The number of star-rated hotel rooms increased from 3,693 in 1995 to 8,791 in 2005, showing an average annual growth of 9.4 per cent.

Finally the number of star-rated hotel beds increased from 5,576 in 1995 to 11,469 in 2005, which represents an average annual growth of 7.7 per cent.

- Food and Beverage

This is an essential service in the industry and includes meal serving services with full restaurant services, meal serving services in self-service facilities and beverage serving services for consumption in the premises.

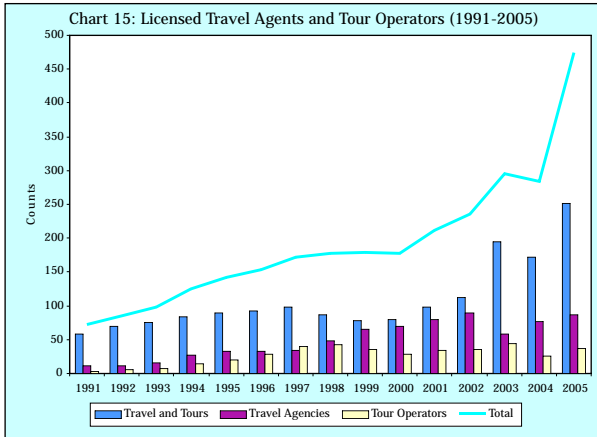


Source: Ghana Tourist Board

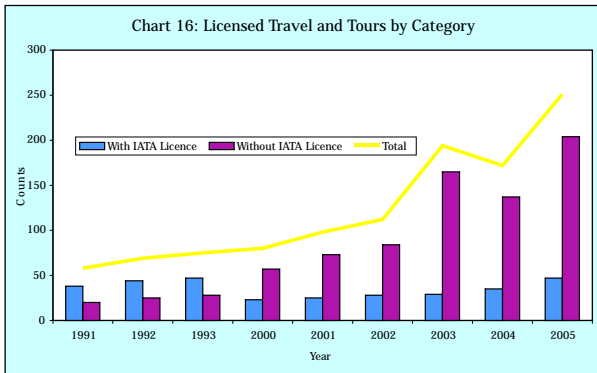
The number of licensed restaurants by category also increased from 154 in 1996 to 372 in 2005, which implies an average annual growth of 20.4 per cent.

- Travel Agency, Tour Operator and Tourist Guide

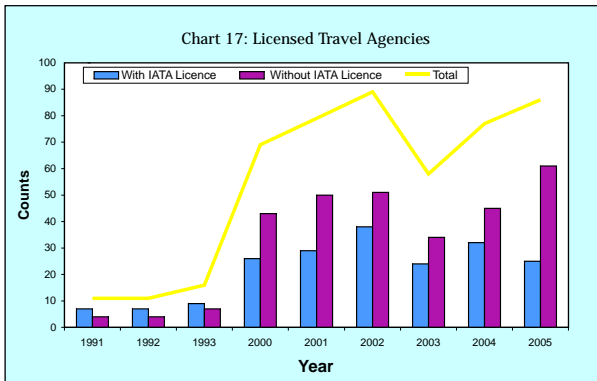
The above services provide the intermediation role to bring buyers and sellers together either to create markets where they previously did not exist or to make existing markets work more efficiently and thereby expand market size. For travel and tourism, intermediation comes about through tour operators who act as wholesalers assembling the components of the tourist trip into a package and retailing the latter through travel agents who deal directly with the public.



Source: Ghana Tourist Board



Source: Ghana Tourist Board



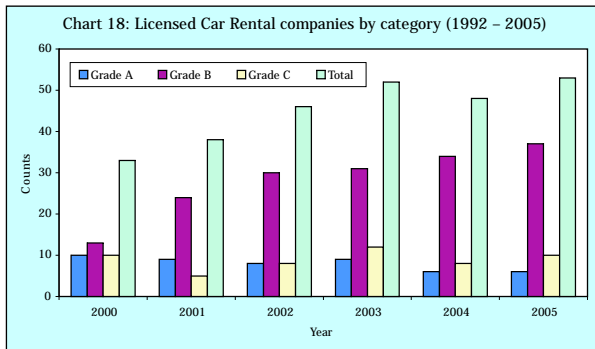
Source: Ghana Tourist Board

The number of licensed travel agents and tour operators increased from 72 in 1991 to 474 in 2005 which showed an average annual growth of 18.4 per cent.

- Passenger Transport

Transportation provides the means to reach the destination and also the means of movement at the destination. Adequate transportation infrastructure is therefore crucial in tourism development. The passenger transport infrastructure includes the following:

- i. Air transport services
- ii. Rail transport services
- iii. Road transport services
- iv. Water transport services



Source: Ghana Tourist Board

The chart shows that the number of licensed car rental companies by category increased from 18 in 1992 to 53 in 2005, which implies an average annual growth of 7.9 per cent.

These findings suggest that the tourism industry in Ghana indeed has tremendous economic potential that needs to be exploited. The nature of the industry is such that there are linkages across the economy, as its tentacles spread into

agriculture, industry and other service sectors like transport, storage and communication, wholesale and retail trade, restaurants and hotels; finance and insurance, etc. Thus it has both a direct and indirect potential impact on national output growth.

### 3. SURVEY FINDINGS

A survey of thirty-seven tourist sites across the country was undertaken to ascertain, among other things, the following:

- i. How sites were administered
- ii. Resources available to the sites
- iii. Profitability of the sites
- iv. Problems facing the sites

Twenty out of the thirty-seven sites responded through questionnaires administered to them. Seventeen sites did not respond. Thus, the response and non-response rates were 54 per cent and 46 per cent respectively. Below are the tabulated results of the survey.

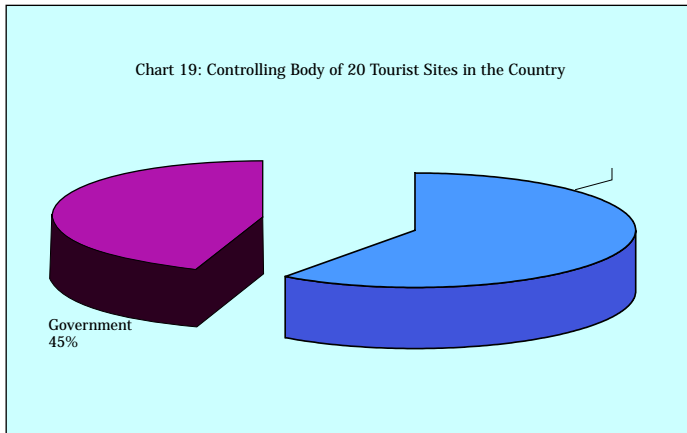




Chart 20: Survey Results: Sources of Funds for Running 20 Selected Tourist Sites

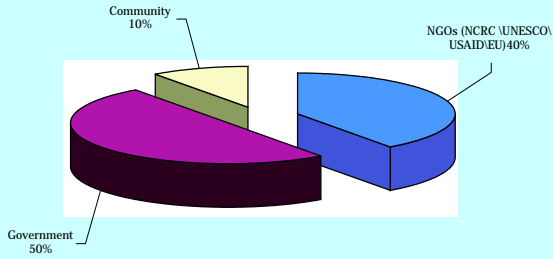


Chart 21: Tourism Survey: Economic Performance of 20 Tourist Sites

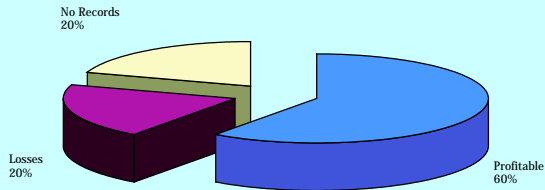
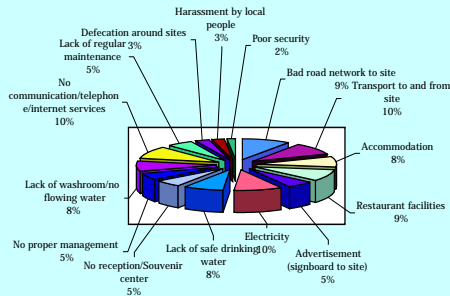


Chart 22: Survey Results: Problems at Tourist Sites





Hippo grazing on the bank at Wechiau, near Wa in the Upper West Region.



Flooded forest ecosystem rich in manatee habitat



### Afram Arm - The Volta Lake Manatee

The West African manatee is critically endangered - with the Volta Lake population among the most important left in the world.



## Boabeng-Fiema Monkey Sanctuary

For over 150 years, the people of Boabeng & Fiema have considered the Colobus and Mona monkeys sacred – children of the gods. Today this is the most important location in the world for this Colobus species. Enhanced protection and management is critical for their continued survival.



## White-Necked Rockfowl - Asumura, Brong Ahafo Region.

One of the top 5 most endangered bird species in Africa, NCRC and partners re-discovered it in Ahafo in 2003. Previously not recorded in Ghana for 40 years, they have documented 35 nests in the Asumura area. Asumura is one of the most important sites of this highly endangered species in the world. Newmont Gold and Wienco are supporting their identification and protection.



Canoe trip in Riverine Forest,  
Wassa Domama, Western Region.

Kob Antelopes  
have returned  
to Wechiau  
Sanctuary, in the  
Upper West Region.



Mole National  
Park

Buffalo and  
elephants at the  
Mole National  
Park.





**Sitatunga - Avu  
Lagoon, Volta Region.**

Western Sitatunga, the  
World's only aquatic  
antelope was discovered in  
the Avu Lagoon in 1998 by  
NCRC.

The lagoon is the only  
location where this dramatic  
specie is found in Ghana.



*Pictures by Courtesy of  
Nature Conservation Research Centre, Accra. (NCRC)*

From the responses of the survey the following facts came out clearly as regards the potentials of the tourism industry in the country:

- a. The tourism sector is fast growing and business in the industry is profitable.
- b. Administration of the sites is mainly either community based/private or government controlled. Government's control is either through district assemblies, Forestry Commission or Ghana Museums and Monuments Board.
- c. Resources for supporting the sites come from a variety of sources. These include foreign sources like the European Union, UNESCO, USAID and NGOs like NCRC. Other sources of funding are from government and the local communities where the sites are based.
- d. However, a host of problems face the sites, which need to be addressed.

## 4. CHALLENGES IN PROMOTING TOURISM IN GHANA

The government and industry stakeholders have been undertaking various activities to help the industry grow and the development of the industry can be seen as a process. For ease of analysis, measures to promote the industry have been divided into five broad headings which are:

- i. Product Development
- ii. Tax Incentives
- iii. Marketing and Awareness
- iv. Improvement in Transportation
- v. Human Resource Development

### 4.1 PRODUCT DEVELOPMENT

Tourism development should be a public-private endeavour as already noted. In furtherance of this, the Ministry of Tourism and Diasporan Relations is being supported by the Japan International Co-operation Agency (JICA) to implement a three-year project entitled: Tourism Development Through the Strengthening of Public-Private Partnership (PPP). The project is designed to assist the tourism sector with the overall goal of tourism development through PPP, an innovative approach that will enable both public and private sectors plan and execute projects or plans together for the mutual benefit of the tourism sector.

Participants who are drawn from both the public and private sectors will be expected to collectively identify and select some few projects to be piloted within the next three years to achieve results. Five broad areas have

been targeted for development in the sector and these are:

- Finance and Investment
- Marketing and Promotion
- Policy
- Product Development
- Human Resource Development

In addition to the development of the PPP concept, listed below are some of the projects being undertaken by the government and other stakeholders to improve product development.

- i. The government has provided HIPC funds for the construction of 24 receptive facilities at some of the key attraction sites nationwide including the Assin Manso Reverential Site, the Observatory Point at Atibie, Kwame Nkrumah's birthplace at Nkroful, the Assin Praso Historical and Eco-tourism zones and the Afadjato Mountain site where a footpath is being constructed for those interested in climbing the mountain.
- ii. The Ministry of Tourism and Diasporan Relations has earmarked some areas and tourist attraction sites for immediate development. This includes Wli Waterfalls, Mole and Kakum National Parks, Elmina Beach, Dodi Islands and Nakwa in the Central Region. This is to be packaged and promoted through private sector initiatives.
- iii. The Global Environment Facility of the UNDP has provided funds under its small grants programme for the development of the crocodile pond at Yarigungu in the Zawze Electoral Area of the Bawku Municipal Assembly.



- iv. The Ministry of Tourism and Diasporan Relations in co-operation with the Ministry of Communications is making efforts to set up an Information and Communication Technology (ICT) centre at the Boabeng Fiema Monkey Sanctuary at Nkoranza and other tourist sites in the country to help visitors to these sites communicate on the internet.
- v. The Brong Ahafo Regional Co-ordinating Council is working in close collaboration with the various municipal and district assemblies in the region as well as the relevant ministries and agencies to upgrade road networks leading to the numerous tourist sites in the region.
- vi. The wildlife Division of the Forestry Commission has fashioned out tourism investment opportunities with a view to encouraging private participation in the tourism sector. In this connection, an agreement has been signed between the Wildlife Division and a Tanzanian company, Moivaro Investment and Trading Company for the development of a total of 160 Eco-Lodge facilities in the Mole National Park and 80 forest lodge facilities in the Kakum National Park. This is in addition to 'build and operate' tourist facilities like tree houses, game viewing hides and trail camps planned for Mole Park. The Wildlife Division has again fashioned out plans for the construction of lodging and other facilities at the Ankasa Resource Centre, Kyabobo National Park and Digya National Park.
- vii. At the Kwame Nkrumah birthplace at Nkroful, the Ghana Tourist Development Company is building a library and also reconstructing the original family house including the kitchen where Nkrumah was born to attract more tourists.

- viii. The Assin Manso slave project is coming on stream
- ix. The Elmina 2015 Strategy Project has begun with support from the European Union. The aim is to package Elmina as a product to showcase its industrial potential, especially the fishing and salt industries, commerce, sports, beaches and other tourist attractions. Co-operating agencies include the Komenda Edina Eguafo Abirem (KEEA) District Assembly, Elmina Traditional Council, Ghana Museums & Monuments Board and Ghana Tourist Board.

#### 4.2 TAX INCENTIVES

The Ghana Investment Promotion Centre (GIPC) has also given the tourism industry a boost to attract more investors into the industry and open new vistas of opportunity in the sector. A new law, Ghana Investment Promotion Centre (Promotion of Tourism) Instrument 2005 has been promulgated and the objective is to enable enterprises in the tourism sector enhance the level and quality of their services to make them more competitive. Under the instrument, accommodation establishments such as hotels, motels, resorts, guests houses and catering rest houses would be exempted from the payment of customs and import duties and other related charges. Also VAT on machinery, appliances, furniture and fittings in pre-approved quantities would be waived. Travel and Tour establishments situated in Accra will enjoy three years tax holiday while those in the regional capitals and elsewhere will enjoy four years and five years tax holidays respectively. Conference and Convention establishments will also enjoy three years tax holidays for those situated within those in the regional capitals and five years for those located elsewhere.

The government is spearheading the establishment of a Tourism Development Fund aimed at cushioning the sector's meagre budgetary allocation to facilitate the aggressive marketing and promotion of the tourism industry.

#### 4.3 MARKETING AND AWARENESS

Various activities and programmes have been initiated by the government and other stakeholders in the industry to improve the poor marketing and lack of awareness syndrome in the industry. These measures are meant to promote international and domestic tourism.

Measures include:

- a. Scancom (Areeba) in collaboration with the Ministry of Tourism and Diasporan Relations in May 2006 launched a 60 second advertisement on CNN to promote Ghana as a tourist and investment destination. This is at a cost of \$200,000.00 per each advert.
- b. The Ministry of Tourism and Diasporan Relations and Ghana Tourist Board in collaboration with the Discovery Channel has produced a tourism documentary dubbed “The Presidential Tour” aimed at marketing the country's tourist potentials abroad.
- c. A project dubbed “The Joseph Project has been launched by the Ministry of Tourism and Diasporan Relations which seeks to bring members of the diaspora in the Caribbean and Americas to their ancestral homeland to coincide with the 50th Anniversary of independence in 2007.

- d. A raffle sponsored by the Ghana Association of Travel and Tourism Agents (GATTA) dubbed “Travel Ghana Raffle” has been launched by the Ministry of Tourism and Diasporan Relations. It is aimed at wooing over a million tourists to Ghana for the 50th independence anniversary celebration and promoting Ghana abroad. The raffle, targeted at Ghanaians living abroad, friends of Ghana, foreigners living in Ghana and Ghanaians at home, forms part of the “Golden Face of Ghana” project initiated by GATTA to promote safe and responsible international as well as domestic tourism. Proceeds from the raffle would be used to set up an endowment fund for the tourism industry to help boost activities in private sector tourism.
- e. A new aviation and sports tourism product, Hang and Paragliding Festival has been introduced by the Ministry of Tourism and Diasporan Relations on top of Mountain Ejuamena, near Atibie in the Eastern Region. The second one organised by the Ministry and sponsored by Kasapa, operators of cellular phone services, brought together 15 foreign pilots and gliders from seven countries to the summit of the mountain and Nkawkaw before they landed at a nearby stadium to entertain Easter merry-makers. The aim is to establish this festival as an annual event and make Ghana the only country in West Africa to host such event in Africa after South Africa and Kenya. In furtherance of promoting this tourism product to pull tourists to Ghana, plans are far advanced to establish an institute to train people in Hang and Paragliding.

#### 4.4 IMPROVEMENT IN TRANSPORTATION

The country's high cost destination syndrome is still a nagging issue. However, North American Airlines started direct flights from the USA to Ghana last year after the collapse of Ghana Airways. This will help reduce the drudgery of connecting flights from the USA to Ghana through Europe and other destinations and also help to reduce the high airfares.

With the new Ghana Investment Promotion Centre (Promotion of Tourism) Bill, it is expected that many private investors will invest in the hotel and hospitality industry to ginger competition to help reduce the high cost of hotel and restaurant services in the country.

#### 4.5 HUMAN RESOURCE DEVELOPMENT

To improve the human resource base of the industry and improve customer service in the sector various private institutions have been set up to help in this regard.

These include:

- a. Global School of Aviation in Accra and Kumasi, which trains people in areas like Air ticketing, Tourism Management, Travel Agent Management, Hotel Management and Marketing.
- b. Starline Training Institute in Accra which offers diploma courses in Hotel Management, Tour Operations and Marketing.
- c. School of Hotel, Restaurant and Tourism Management at Trade Fair Centre, Accra which offers courses in hotel and restaurant management.

- d. Funding is being sought by the government to transform Eredec Hotel in Koforidua, Eastern Region into a regional tourism and hospitality training academy and centre in the sub-region.
- e. At the higher institution level, the University of Cape Coast has started offering degree courses in Tourism.

## 5. CONCLUSIONS & RECOMMENDATIONS

The foregoing analysis has portrayed a picture of what is entailed in the tourism industry, what Ghana currently has to offer in the industry, problems in the industry and attempts to solve the problems to make the sector contribute significantly to the country's economic development.

The analysis has shown that Ghana has vast tourism potentials both in terms of natural features and her rich cultural heritage to make tourism a booming sector of the country's economy.

Over the years, tourist arrivals and foreign exchange earnings have been growing significantly. This phenomenon can be further enhanced by the characteristic hospitality of the Ghanaian. However, after considering the state of the tourism industry in Ghana today, the country has a long way to go to get the industry to levels, which pertain in African countries like the Gambia, Kenya, Tanzania, South Africa, Zimbabwe, Egypt and Morocco. A lot needs to be done if the country wants to make a headway.

To begin with, the country needs to start from the beginning by providing basic infrastructure and facilities at the tourist sites. From visits to the tourist sites and responses from the tourist operators a lot needs to be done to fill the gap in the facilities and infrastructure at the sites and these include access roads, reception centres, trained tour guides, washroom and toilet facilities, accommodation and lodging facilities, restaurant facilities, potable water and electricity, transportation, ICT facilities, sanitation, security and proper management of sites.

There is the need to improve and add value to some of the existing sites to attract more tourists to yield more revenue for the economy. For instance, Ankasa Resource Reserve can become more popular and attract more tourists if a canopy walkway can be built there as at Kakum. Attraction to Lake Bosomtwe can be enhanced with the provision of speed boats on the lake for the pleasure of tourists interested in fishing and this should go with provision of life guards. The possibility of building a cable car for tourists to travel across the lake can also be explored. Dodi Islands remains undeveloped and a disappointment to tourists. Value can be added to the island with provision of basic facilities like walkways, rest stops and chalets.

Clearly the country's tourism potential has not been fully explored and there is the need to develop more viable tourist sites which abound in the country to rake in more foreign exchange. These potential sites include Tenzuk Hills, Widnaba eco-tourism site, Sirigu Craft Village, Navrongo slave market, Kyabobo National Park, Old German buildings and fetish shrines in the Krachi District, Tagbo Waterfalls, Agumatsa Waterfalls, Tsatsadu Waterfalls and Tizor Water falls in the Volta Region, the Tano-Boase Sacred Grove, Bats Colony in Techiman and Buoyem Caves in the Brong Ahafo Region.

In the eco-tourism sector, Ghana has 23 wildlife heritage sites comprising seven national parks at Mole, Kakum, Bui, Bia, Digya, Nini-Suhien and Kyabobo. There are six resource reserves at Ankasa, Assin-Atandanso, Bia, Gbele, Kalakpa and Shai Hills. There are four wildlife sanctuaries at Agumatsa, Buabeng-Fiema, Bomfobiri and Owabi. There also are five coastal ramsar sites at Densu, Keta Lagoon, Muni-Pomadze, Sakumo and Songor and one nature reserve at Kogyae. These sites are vital sources for generating income and wealth. However, for several years, many of these sites have been under-utilised and neglected and prone to many hazards. Ramsar sites are often used for waste disposal, while the parks and resource reserves are prone to bushfires, poaching, tree cutting and charcoal burning. There is the need to develop and market such sites to attract tourists for the much-needed wealth creation.



The craft villages need help to boost their tourism potential and entrepreneurial effort. Structures being built for the craftsmen to ply their trade at Ahwiaa and Aburi have been abandoned which is unfortunate. The structures need to be reactivated by the various district assemblies to help boost that sector. The private sector should also be encouraged to supplement government efforts in providing structures for the craftsmen by building stalls for hire to the craftsmen.

Aside the structures, there is the need to start or deepen co-operative structures of the craftsmen to make them more viable and also help them have access to loans from the financial sector. In this sector it is worthy of note that the chief of Tewobabi near Ntonso in the Ashanti Region who is in the Adinkra and Kente industry is building structures to promote the industry. He has already built a reception centre, a factory with facilities for training the disabled to be employed in his factory, residential facilities for the workers, a showroom, a 24-seater water closet toilet facilities, urinals and telephone facilities. He intends building hotel and restaurant facilities, a swimming pool and a pond for fishing by tourists and an ICT centre. It is recommended that his outfit be used as tourist reception centre for the catchment area of Ahwiaa, Ntonso, Bonwire, Pankrono and surrounding areas.

Indeed, tourism is a community affair and everybody in the catchment community must be involved. In Ghana many people including the district and municipal assemblies seem to believe that tourism development and promotion is the sole responsibility of the Ministry of Tourism and Diasporan Relations and the Ghana Tourist Board.

The district and municipal assemblies should spearhead the campaign to get people educated in their various areas about the benefits of tourism and expectations from the citizens. If people know about the benefits of tourism, they are not likely to defecate around tourist sites and the beaches, win sand at the beaches or harass tourists for gifts and other favours. As a collorary to this,

district and municipal assemblies should provide toilet and sanitary facilities for citizens in their areas and thence implement existing bye-laws on sanitation or institute such laws where none exists.

Domestic tourism must be given a boost to be spearheaded by the Ghana Association of Travel and Tourist Agents and given publicity in the local press. Tour packages spanning a day to several days to various sites should be embarked upon by the tour agencies and this can be targeted at various institutions like schools, churches, voluntary associations and the general public. Apart from helping people to know about other people's culture and history in the country, it will help improve the rural economy as people buy food, water and souvenirs and may, perhaps, invest in the communities that host tourist attractions. Boosting domestic tourism should go in tandem with provision of handy information about tourist sites, directions to the sites, road maps, city and town maps.

As a matter of policy, there is the need to place a tourism officer in each of the district assemblies. The officer will be the hub around whom tourism develops in the district and he or she is to liaise with other tourism development agencies and stakeholders in the district. It will be the duty of the officer to identify the tourism potential of the district, identify tourism development gaps in terms of infrastructure and facilities which will then be leveraged to the private sector as attractive investment opportunities.

Ghana's diplomatic missions in co-operation with tourism development agencies must spearhead marketing of Ghana's tourism potential overseas. This needs to be tackled with greater zeal and focus. For example, the successes of the national football team at the recently held World Cup in Germany, has laid a good foundation for tourism development, and this must be built upon. This should, however, go hand in hand with developing attractive local tourist sites so that they don't become a disappointment to foreign tourists after spending so much to come into the country.

In conclusion, it is apparent that lack of funds or poor funding of the sector is the bane of the country's tourism development and progress. The establishment of the Tourism Development Fund spearheaded by GATTA and the promulgation of the new Ghana Investment Promotion Center (Tourism Promotion) law are laudable events to get the private sector to go into tourism development. However, looking at the ambitious targets set by the five-year tourism development programme enshrined in the introduction, it is not likely the targets will be met.

The tourism environment in the country is not likely to change significantly in the next couple of months despite the fact that the country celebrates her 50th independence anniversary in 2007 which may attract more visitors to Ghana. To push the industry to the levels envisaged in the targets, it is recommended that the country inject more funds into the sector in addition to sourcing capital from foreign sources to develop the sector holistically.

Appendix 1  
International Tourist Arrivals and Receipts 1991-2005  
(Thousands of arrivals, receipts in Millions of US\$ and percentages)

Year	Arrivals ('000)	Annual Change	Receipts (US\$ million)	Annual Change (%)
1991	172.0	17.8	118.0	45.7
1992	213.0	23.8	167.0	41.5
1993	257.0	20.7	206.0	23.4
1994	271.0	5.4	228.0	10.7
1995	286.0	5.5	233.0	2.2
1996	305.0	6.6	249.0	6.9
1997	325.0	6.6	266.0	6.8
1998	348.0	7.1	284.0	7.0
1999	373.0	7.2	304.0	7.0
2000	399.0	6.9	386.0	27.0
2001	439.0	10.0	448.0	16.1
2002	483.0	10.0	26.0	16.1
2003	531.0	9.9	603.0	16.0
2004	584.0	10.0	649.0	7.6
2005*	429.0	26.5	836.0	28.8

Source: Ghana Tourist Board

\* Provisional

Appendix 2  
Tourism Receipts Compared with Ghana's Merchandise Exports and Remittances  
1991 – 2005 (\$Million and Percentages)

Year	Cocoa Beans and Products	Gold	Timber and Timber Products	Other Exports	(a) Total Merchandise Exports	Remittances	(b) Tourism Receipt	(c) b as % of a
1991	346.5	304.4	124.2	222.5	997.7	219.5	118.0	11.8
1992	302.5	343.4	113.9	226.6	986.3	254.9	167.0	16.9
1993	285.9	434.0	147.4	196.4	1063.6	261.2	206.0	19.4
1994	320.2	548.6	165.4	203.5	1237.7	271.0	228.0	18.4
1995	389.5	647.3	190.6	203.9	1431.2	263.2	233.0	16.3
1996	552.0	612.4	146.8	258.8	1570.1	276.1	249.0	15.9
1997	470.0	579.2	172.0	268.7	1489.9	400.4	266.0	17.9
1998	620.4	687.8	171.0	611.6	2090.8	453.8	284.0	13.6
1999	552.3	710.8	173.8	568.4	2005.3	472.0	304.0	15.2
2000	437.1	702.0	175.2	621.9	1936.3	499.0	386.0	19.9
2001	382.7	617.8	169.3	697.3	1867.1	709.7	448.0	24.0
2002	474.4	689.1	182.7	669.0	2015.2	680.0	520.0	25.8
2003	802.2	830.1	174.7	755.4	2562.4	1017.2	603.0	23.5
2004	817.7	830.1	174.7	739.8	2562.4	1287.1	649.0	25.3
2005	908.6	945.6	226.5	721.5	2802.2	1549.8	836.0	29.8

Source: Ghana Tourist Board, Bank of Ghana

Column C is the author's own calculations

Appendix 3  
International Tourism Receipts Compared with Ghana's GDP  
1991 - 2005 (\$ 'million and Percentages)

Year	(a) GDP(\$ 'million)	(b) Tourism Receipt (\$ 'million)	(c) b as % of a
1991	6601	118	1.8
1992	6413	167	2.6
1993	5967	206	3.5
1994	5440	228	4.2
1995	6458	3233	3.6
1996	6925	249	3.6
1997	6883	266	3.9
1998	7474	284	3.8
1999	5830	304	5.2
2000	4977	386	7.8
2001	5309	448	8.4
2002	6160	520	8.4
2003	7624	603	7.9
2004	8862	649	7.3
2005	10690	836	7.8

*Sources: Ghana Tourist Board, Ghana Statistical Services, Bank of Ghana  
Column C is the author's own calculations*

Appendix 4  
Direct and Indirect Employment Generation 1996 - 2004  
(Thousands of Employees and Percentages)

Year	Direct	Indirect	Total	Annual Change (%)
1996	18.8	46.4	65.2	10.5
1997	20.8	51.3	72.1	10.6
1998	22.9	56.6	79.6	10.4
1999	25.4	62.6	87.9	10.4
2000	26.0	64.1	90.1	2.5
2001	29.3	72.5	101.8	13.0
2002	33.1	82.1	115.2	13.2
2003	37.3	90.4	127.7	10.9
2004	46.5	115.0	161.5	26.5

*Sources: Ghana Tourist Board*

Appendix 5  
Receipts (Expenditure) of Visitors by Segmentation (US\$'M)

YEAR	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
CATEGORY										
Local Transportation	16.32	22.39	29.21	22.72	24.33	34.74	40.0	46.76	48.22	51.95
Shopping (Formal Market)	20.99	22.39	23.90	28.40	30.41	38.60	44.78	51.96	60.28	64.94
Shopping (Informal Market)	13.99	22.39	26.56	22.72	30.41	34.74	40.30	46.76	60.28	64.94
Food and Beverage	34.98	32.34	39.84	42.59	48.66	57.90	67.17	77.94	96.45	103.90
Accommodation	72.29	72.15	82.33	93.71	94.28	119.66	143.31	166.26	186.87	201.30
Entertainment and Recreation	46.64	62.20	42.49	45.43	48.66	69.48	76.13	88.33	96.45	103.90
Other Expenditure	23.32	14.94	21.26	28.39	27.37	30.88	35.84	41.56	48.22	51.95
Total Receipts	228.53	248.80	265.59	283.96	304.12	386.00	447.83	519.57	602.80	642.88

Source: Ghana Tourist Board

Appendix 6  
Percentage Breakdown of Tourist Expenditure (Average) 1996 - 2002

CATEGORY	1996	1997	1998	1999	2000	2001	2002
Local Transportation	9	11	8	8	9	9	9
Shopping (Formal Market)	9	9	10	10	10	10	10
Shopping (Informal Market)	9	10	8	10	9	9	9
Food and Beverage	13	15	15	16	15	15	15
Accommodation	29	31	33	31	31	32	32
Entertainment and Recreation	25	16	16	16	18	17	17
Other Expenditure	6	8	10	9	8	9	9

Source: Ghana Tourist Board

Appendix 7  
International Tourist Arrivals from Thirteen Generating Markets 2000 - 2004

Country	2000	2001	2002	2003	2004
USA	26,317	28,945	31,834	35,013	38,508
UK	34,546	37,994	41,787	45,959	50,547
Germany	19,254	21,173	23,286	25,611	28,168
France	14,418	15,857	17,440	19,181	21,096
Netherlands	9,659	10,623	11,684	12,850	14,133
Canada	5,361	5,896	6,485	7,132	7,844
Switzerland	3,784	4,162	4,577	5,034	5,537
Scandinavia	5,325	5,857	6,442	7,085	7,792
Italy	4,845	5,328	5,860	6,445	7,089
Overseas Ghanaian	108,609	119,451	131,376	144,492	158,917
Cote D'Ivoire	19,183	21,098	23,204	25,521	28,069
Nigeria	54,764	60,231	66,244	72,857	80,131
Togo	11,941	13,133	14,444	15,886	17,472

Source: Ghana Tourist Board

Appendix 8  
Hotel Occupancy Rates 2000 – 2004

	2000	2001	2002	2003	2004
5 - Star	77.8	72.1	73.4	74.2	74.0
4 - Star	71.4	76.0	80.6	76.1	78.5
3 - Star	64.1	62.4	65.0	63.1	66.5
2 - Star	60.0	55.8	64.0	62.4	64.5

Source: Ghana Tourist Board

Appendix 9  
Licensed Hotels, Rooms and Beds 1991 - 2005

YEARS	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
No. of Hotels	419	509	587	624	580	703	751	730	834	992	1053	1169	1289	1315	1345
% Growth	19.7	21.5	15.3	6.3	7.1	21.2	6.8	2.8	14.2	1.89	6.1	11.0	10.3	2.0	2.3
No. of Rooms	6339	7666	8578	8865	8518	10263	10921	10879	11123	13641	15453	16180	17835	18079	18752
% Growth	11.7	20.9	11.9	3.3	3.9	20.5	6.4	0.4	2.2	22.6	13.3	4.7	10.2	1.4	3.7
No. of Beds	9189	10902	12112	12373	11938	13791	14164	14299	14818	17558	19648	21442	23175	23538	23924
% Growth	7.2	18.6	11.1	2.2	3.5	15.5	2.7	1.0	3.6	18.5	11.9	9.1	8.1	1.6	1.6

Source: Ghana Tourist Board

Appendix 10  
Licensed Star - Rated Hotels, Rooms and Beds

YEARS	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
No. of Hotels	168	198	243	253	276	354	367	434	481	494	504
% Growth	11.3	17.9	22.7	4.1	9.1	28.3	3.7	18.3	10.8	2.7	2.0
No. of Rooms	3,693	4,046	4,665	4,954	5,116	5,962	6,513	7,377	8,320	8,536	8,791
% Growth	11.5	9.6	15.3	6.2	3.3	16.5	9.2	13.3	12.8	2.6	3.0
No. of Beds	5,576	5,826	6,502	6,981	7,175	8,045	8,568	9,735	11,697	11,580	11,469
% Growth	7.9	4.5	11.6	7.4	2.8	12.1	6.5	13.6	20.2	-1.0	-1.0

Source: Ghana Tourist Board

Appendix 11  
Licensed Restaurants by Category 1996 - 2005

YEARS	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Grade 1	28	36	29	29	30	33	43	51	50	101
Grade 2	44	53	78	78	61	67	74	88	90	154
Grade 3	82	111	113	113	115	149	145	169	134	186
Fast Food		13	13	13	25	22	50	59	25	59
Total	154	213	233	233	231	271	312	367	299	327
% Growth	63.8	38.3	9.4	0.0	-0.9	17.3	15.1	17.6	18.5	24.4

Source: Ghana Tourist Board

Appendix 12  
Licensed Travel Agents and Tour Operators, 1991-2005

CATEGORY	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Travel and Tours															
a. With IATA Licence	38	44	47	-	-	-	-	-	-	23	25	28	29	35	47
b. Without IATA Licence	20	25	28	-	-	-	-	-	-	57	73	84	165	137	204
Subtotal	58	69	75	84	90	93	98	87	78	80	98	112	194	172	251
Travel Agencies															
a. With IATA Licence	7	7	9	-	-	-	-	-	-	26	29	38	24	32	25
b. Without IATA Licence	4	4	7	-	-	-	-	-	-	43	50	51	34	45	61
Subtotal	11	11	16	27	32	33	34	49	65	69	79	89	58	77	86
Tour Operators	3	5	7	14	20	28	40	42	36	28	34	35	44	25	37
Total	72	85	98	125	142	154	172	178	179	177	211	236	296	284	474
% Growth	60	18	15.3	27.6	13.6	8.4	11.7	3.5	0.6	-1.1	19.2	11.8	25	-4.1	66.9

Source: Ghana Tourist Board

Appendix 13  
Licensed Car Rental Companies by Category, 1992 – 2005

CATEGORY	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Grade A	-	-	-	-	-	-	-	-	10	9	8	9	6	6
Grade B	-	-	-	-	-	-	-	-	13	24	30	31	34	37
Grade C	-	-	-	-	-	-	-	-	10	5	8	12	8	10
Total	18	22	24	27	30	25	26	27	33	38	46	52	48	53
% Growth	-10	22.2	9.1	12.6	11.1	-16.7	4.0	3.8	22.2	15.2	21.1	13.0	-7.7	10.4

Grading of Car Hire Rental companies commenced in the year 2000

Source: Ghana Tourist Board

Appendix 14  
Controlling Body of 20 Tourist Sites in the Country

Controlling Body	Absolute Figures	Percentage (%)
Community / Private	11	55.0
Government	9	45.0

Appendix 15  
Sources of Funds for Running 20 Tourist Sites in the Country

Source of Resource	Absolute Figures	Percentage (%)
Nature Conservation Research Center (NCRC) \UNESCO\USAID\ EU	8	40.0
Government	10	50.0
Community	2	10.0



Appendix 16  
Profitability of 20 Tourist Sites in the Country

Results of Operations	Absolute Figures	Percentage (%)
Profitable	12	60.0
Losses	4	20.0
No Records	4	20.0

Appendix 17  
Major Problems Facing 20 Tourist Sites in the Country

Problem	Absolute Figures	Percentage (%)
Bad road net work to site	18	90.0
Transport to and from site	18	90.0
Accommodation	15	75.0
Restaurant facilities	17	85.0
Advertisement (signboard to site)	10	50.0
Electricity	18	90.0
Lack of safe drinking water	15	75.0
No reception/Souvenir center	10	50.0
No proper management	10	50.0
Lack of washroom/no flowing water	15	75.0
No communication/telephone/internet services	18	90.0
Lack of regular maintenance	10	50.0
Defecation around sites	5	25.0
Harassment by local people	5	25.0
Poor security	3	15.0

Appendix 18: Trend Estimates for Aircraft and Freight Movements and  
Passenger Arrivals

Sample: January 2001 - March 2003

	Air Craft Movements	Freight Movements	Passenger Arrivals
Equation	$Y = -2.9039x + 396.9$	$Y = -1901.5x + 1E06$	$Y = -70.406x + 28158$
R Squared	0.7872	0.5903	0.1234

Sample: April 2003 - December 2005

	Air Craft Movements	Freight Movements	Passenger Arrivals
Equation	$Y = 5.5294x + 3.64.23$	$Y = 5496.9x + 1E= 06$	$Y = 181.42x + 26281$
R Squared	0.5875	0.0584	0.4225

## Appendix 19: Tourism Sites

Ghana has quite a wide range of tourist attraction centres that are located across the country. These can be placed under three broad categories, namely; Cultural sites, Festivals and Events, and Others. These are presented in the tables below.

### (i) Cultural

Cultural sites include historic sites, traditional sites, natural sites, eco-tourist sites, and craft centres. Examples of each of these are given below:

Table 1: Historic Sites

Facility	Location	Region
Cape Coast Castle <sup>1</sup>	Cape Coast,	Central Region
Elmina Castle	Elmina,	Central Region
Kumasi Fort	Kumasi,	Ashanti Region
Tetteh Quarshie Cocoa Farm	Mampong Akuapim,	Eastern Region
Abonse Slave Market	Abonse,	Eastern Region
Assin Manso Slave Cemetery	Assin Manso,	Central Region
Kwame Nkrumah Mausoleum	Accra,	Greater Accra Region
Kwame Nkrumah Grave	Nkroful,	Western Region
Salaga Slave Market	Salaga,	Northern Region
Warinyaga Mosque	Garu Warinyaga,	Upper East Region
Larabanga Mosque/Mystery Stone	Larabanga	Northern Region
Paga Nania Slave Market	Paga,	Upper East Region
Gwollu Slave Traders Defence Wall	Gwollu,	Upper West Region

<sup>1</sup> Ghana has 22 castles and forts dotted along the coast of the country

Table 2: Traditional Sites

Facility	Location	Region
Manhyia Palace/Okomfo Anokye Sword	Kumasi,	Ashanti Region
Wa Na's Palace,	Wa	Upper West Region
Akonedi Shrine,	Larteh	Eastern Region
Krachi Dente Shrine	Kete Krachi	Volta Region
Nzulezu Village on Stilts	Nzulezu,	Western Region
Antoa Grove and Shrine	Antoa,	Ashanti Region
Yaa Asantewaah Museum,	Ejisu,	Ashanti Region

Table 3: Natural Sites

Facility	Location	Region
Lake Bosomtwe	Kuntanase	Ashanti Region
Boti Falls	Huhunya	Eastern Region
Volta Lake	Akosombo	Eastern Region
Volta Estuary	Ada	Greater Accra Region
Wli Water Falls	Hohoe	Volta Region
Kintampo Water Falls	Kintampo	Brong Ahafo Region
Mountain Afadjato	Amedzofe	Volta Region
Odweanoma Mountains/Paragliding	Kwahu Atibie	Eastern Region
Dodi Island/Dodi Princess	Akosombo	Eastern Region

Table 4: Eco-Tourist Sites

Facility	Location	Region
Kakum National Park/Walkway	Abrafo - Odumasi	Central Region'
Shai Resource Reserve	Shai	Greater Accra Region.
Ankasa Forest Reserve	Ankasa	Western Region
Amansuri Conservation Area	Beyin	Western Region.
Tafi Atome Monkey Sanctuary	Tafi	Volta Region
Mole National Park	Larabanga	Northern Region
Fiema Boabeng Monkey Sanctuary	Boabeng-Fienia	Brong Ahafo Region
Bui National Park	Bui	Northern Region
Paga Crocodile Pond	Paga	Upper East Region
Aburi Botanic Garden	Aburi	Eastern Region

<sup>2</sup> Ghana has 23 wildlife heritage sites across the country

Table 5: Craft Centres

Facility	Location	Region
Bonwire Kente Village	Bonwire	Ashanti Region
Ntonso/Tewobabi Adinkra Village	Ntonso	Ashanti Region
Ahwia Craft Village	Ahwia	Ashanti Region
Aburi Craft Village	Aburi	Eastern Region

Table 6: Festivals and Events

Facility	Location	Region
Homowo Festival	Accra	Greater Accra
Hogbetsotso	Anloga	Volta Region
Aboakyer	Winneba	Central Region
Akwantutenten	Worawora	Volta Region
Edina Bakatue	Elmina	Central Region
Akwanbo	Agona	Central Region
Odwira	Den	Central Region
Ohum	Akim Abuakwa	Eastern Region
Odwira	Aburi, Akropong, Akwapim Larteh, Amonokrom, Ahwerease	Eastern Region
Damba	Mamprusi	Northern Region
Adae Kese	Kumasi	Ashanti Region
Fetu Afahye Emancipation Day Festival for Africans and People of African Descent Pan-African Historic Festival (PANAFEST) for Africans and People of African Descent	Cape Coast	Central Region Greater Accra, Central, Western Greater Accra, Central, Western

Table 7: Other Sites

Facility	Location	Region
Akosombo Dam	Akosombo	Eastern Region
Tongo Whistling Rock	Tongo	Upper East Region
Akim Oda Big Tree	Akim Oda	Eastern Region

