



Influence of destination packaging on tourism performance in Nigeria

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Abstract

The purpose of this study was to examine the influence of destination packaging on tourism performance in Nigeria and to highlight the travel and tourism competitiveness index of countries in Sub-Saharan Africa. The study made use of secondary data collected from the database of world bank and world economic forum travel and tourism competitiveness index. The findings indicated that destination packaging strategies of Nigeria are inefficient and ineffectiveness. The prioritization of travel and tourism by the government is not encouraging to be compared with other top destinations in the region. This resulted in low contribution of tourism to employment, GDP, tourism investment and low tourist arrivals to Nigeria. The study recommends prioritization of travel and tourism industry by government at all levels through policy frameworks in order for private sectors to help in destination packaging and thereby attracts more international tourists to Nigeria.

Keywords: destination, packaging, tourism, Nigeria, sub-sahara, Africa

Introduction

Across the globe, tourism has evolved as one of the most expansive, diverse and sectors of our time. Now representing one of the largest and fastest growing economic sectors in the world, tourism contributing 9% of global GDP. Importantly, supporting the livelihoods of 1 in 11 people worldwide, the sector has become a source of immense opportunity and possibility (UNWTO, 2017). Tourism is becoming one of the main focus for economic revitalization globally and especially in developing countries where attention is being directed, to serve as avenue for economic diversification (Awodele & Ayeni, 2011)^[1].

Destinations recognizing the ability of the sector to transform nations economically, socially and environmentally, and therefore investing in the sector, have enjoyed significant progress, thus demonstrating tourism's role as an essential tool leading to the development, prosperity and well-being of a country's economy. In Africa, tourism continues to enjoy sustained growth. In 2014, the continent welcomed 56 million international tourists from 26 million in 2000. International tourism receipts increased by US\$1billion last year, reaching US\$36billion and accounting to 7% of all exports in the continent (UNWTO, 2017).

The African continent is truly blessed with a rich diversity, an abundance of untouched resources, natural beauty, cultural heritage and historical sites, wildlife, safaris, beaches, deserts and much more that, if channelled properly, could provide considerable opportunities for cultural tourism, ecotourism, adventure tourism, and diaspora tourism (UNWTO, 2017). In the same vein, Nigeria's tourism potentials are enormous as the country offers a wide variety of tourist attractions. These attractive, exciting, exotic and amazing tourist attractions

waiting to be explored in various parts of the country, if correctly packaged and promoted, could provide opportunities for job creation, more international arrivals, revenue generations, and development of rural communities.

Despite the enormous tourism resources in Nigeria, ineffective packaging of the destinations has always been the major challenge facing the country. World tourism organization in 2006 reported that tourist products in Nigeria were not organized and well packaged and this has resulted to downward trend in tourism competitiveness ranking of the country and also resulted in low international tourist arrivals as compared to some of the African countries with proper packages for their tourism industry.

According to the travel and tourism competitiveness index (TTCI) of 2015 released by World Economic Forum, Nigeria slipped downward in the world ranking from 127th in 2013 to 131st in 2015, out of 141 countries surveyed. In addition, international tourist arrivals continued to fluctuate negatively in comparison with other African countries.

Objectives of the study

The main objective of this study is to examine the influence of destination packaging on tourism performance of Nigeria. Specifically, the study seeks to examine the Competitiveness Index of Nigeria and other countries from Sub-Saharan Africa.

Review of Related Literature

The Concept of Packaging

Kotler (2003)^[10] defines packaging as "all the activities of designing and producing the container for a product". This definition highlights packaging of goods and not that of services. Morrison (2002)^[6] gave a clearer understanding of

packaging in the tourism industry. He sees packaging as “the combination of related and complementary services into a single price offering”. Morrison tries to related packaging to programming. He opines that programming involves developing special activities, events, or programmes to increase customer spending or to give added appeal to a package or other hospitality/travel service.

According to Morrison (2002) [6], packages and programmes perform the following five key roles in hospitality and travel marketing: (see the old work to copy).

Kotler (2003) [10], on the other hand, argues that various factors have contributed to the growing use of packaging as a marketing tool and they include:

- **Consumer affluence:** rising consumer affluence means consumers are willing to pay a little more for the convenience, appearance, dependability and prestige of better packages.
- **Company and brand image:** packages contribute to instant recognition of the company or brand.
- **Innovative opportunity:** innovative packaging can bring large benefits to consumers and profits to producers.

The total packaging of the destination is referred to as destination competitiveness.

Destination Competitiveness

Destination competitiveness is the ability of one country to create additional values and thus increase the national wealth by managing assets and processes, attractiveness, aggressiveness and proximity and by integrating these relationships within an economic and social model that takes into accounts a destination’s natural capital and its preservation for future generation (Ritchie & Crouch, 2003)

The success of founding destination in world markets is influenced by their relative competitiveness (Tanja, *et al*, 2001). A competitive advantage can be achieved if the overall appeal of the destination is synonymous to that of an alternative destination to potential visitors (Dwyer & Kim, 2003; Tanja *et al*, 2011) [7]. However, it must be highlighted that the competitiveness of the tourism destination is not defined by the set of rigid natural, cultural, artistic or environmental resources, but it is seen as an overall appeal of the destination (Cracolici & Nijkamp, 2009; Tanja *et al* 2011)

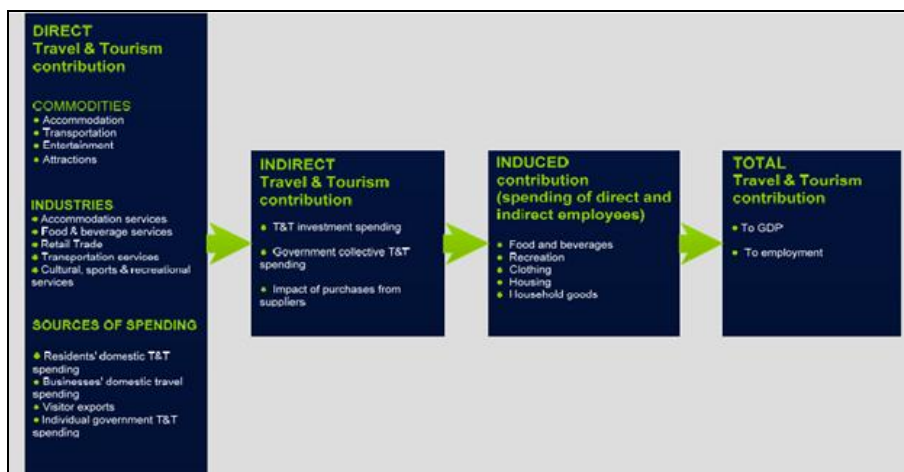
[7]. Consequently, tourism will achieve a formidable position on the tourism market if a destination is capable of gaining and maintaining competitive advantage. In order to achieve proper matches between tourism resources and management strategies, it is necessary for the industry and government to determine and understand the market and strongest points of new country’s competitiveness. (Tanja, *et al*, 2011) [7].

According to Crouch (2011) [5], tourism destination needs to develop, maintain, protect and strengthen their competitive position at a global level. The development of a destination competitiveness model will allow tourism stakeholders to identify key strengths and weakness, highlight opportunities for visitor attraction development and develop strategies to capitalize on these opportunities and to counter possible threats to future alteration development (Balkaran & Maharaj, 2013) [3].

There are many models created in an attempt to measure competitiveness as a unique phenomenon. Models differ according to the defined factors not determine competitiveness and their grouping (Tanja, *et al*, 2011) [7]. The most comprehensive academic modelling to date has been that of Ritchie and Crouch (2003), Dwyer and Kim (2003) and Crouch (2011) [5], while major industry modelling has been undertaken by the WTTC and world economic forum (2011; 2013; & 2015). A long-term view of competitiveness is paramount, and from a strategic planning perspective, sustained destination competitiveness requires two fundamental elements: resources representing sources of comparative advantage and effective destination management most elements of which the DMO has no control (Pike & Page, 2014) [12].

Tourism and Economic Growth in Nigeria

Tourism is widely acknowledged as an effective tool for socio-economic development because of the possible backward and forward linkages with the rest sectors of the economy which allows it to facilitate employment opportunities, income, and economic development and enhance quality of life (Ayeni & Ebohon, 2012). It is also an important economic activity in most countries around the world, as well as its direct economic impact, the industry has significant indirect and induced impacts (WTTC, 2015).



Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

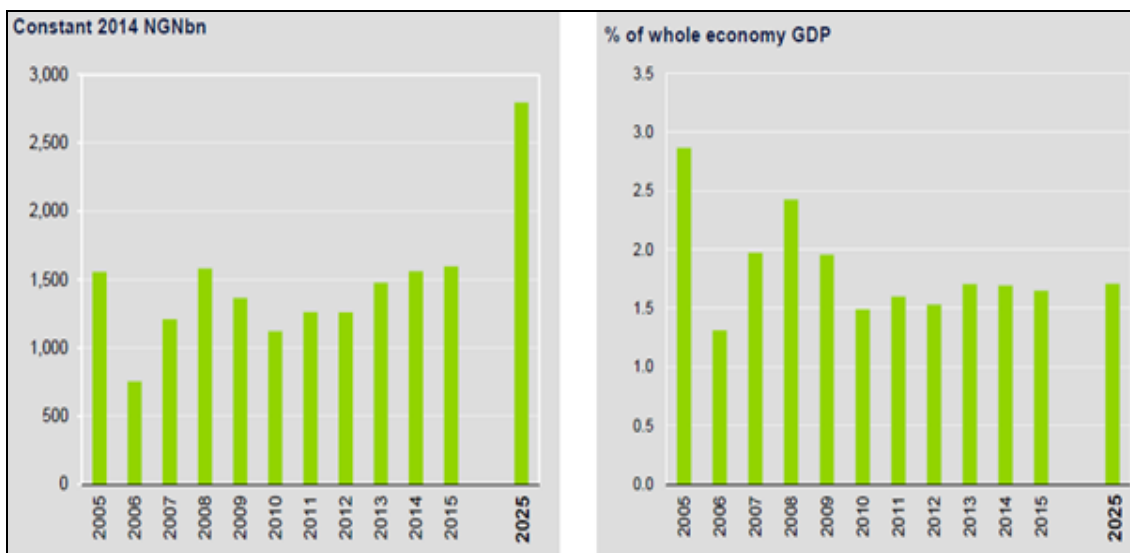
Fig 1: Economic Contribution of Travel and Tourism.

The figure shows the direct contribution of travel and tourism to GDP, indirect, induced and total contribution of tourism to GDP. The direct contribution of travel and tourism to GDP reflects the ‘internal’ spending on travel and tourism (total spending within a particular country on travel and tourism by residents and non-residents for business and leisure purposes) as well as government “individual spending” by government on travel and tourism services directly linked to visitors, such as cultural (museums or recreational, e.g. national parks). On the other hand, the total contribution of travel and tourism includes its ‘wider’ impacts (i.e. the indirect and induced impacts) on the economy. The direct contribution includes the GDP and jobs supported by: travel and tourism investment spending on important aspects of both purchase of new aircraft and construction of new hotels; government ‘collective’ spending, which helps travel and tourism activities in many different ways as it is made on behalf of the ‘community at large’ e.g. Tourism marketing and promotion, aviation, administration, security services, or armed 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. Besides, the ‘induced’ contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the travel and tourism sector (WTTC, 2015). Tourism over the years has proven to be a surprisingly strong and resilient economic and a fundamental contributor to

economic growth of nations by generating billions of dollars in exports and creating millions of jobs (Yusuff & Akinde, 2015) [22]. Tourism generated US\$76 trillion (10% of global GDP) and 277 million jobs (1 in 11 jobs) for the global economy in 2014. Recent years have also seen the sector growing at a faster rate than both the wider economy and other significant sectors such as automotive, financial services and health care. The international arrivals also surged, reaching nearly 1.14 billion and visitors spending more than matched that growth (WTTC, 2015).

With oil revenue on the decline, as a result of the global financial crisis, the Nigerian government has been looking for ways to breathe new life into the economy. Realizing that tourism is a strong alternative to crude oil as a revenue earner, in view of declining global oil prices, it has selected the industry as one of six priority areas central for revival of the economy. The government has made tourism its main instrument for achieving vision20:20:20 programme through diversification process, it hopes to reposition the industry as alternative source of revenue (World Travel Market, 2010) [18] and create more jobs (Gregory & Ajibola, 2013).

The direct contribution of travel and tourism to GDP for Nigeria in 2013 was NGN757.3 bn (1.6% of GDP). This figure increased to NGN1, 560.26 (1.7% of GDP) in 2014. This is forecast to rise by 2.4% to NGN1, 597.1bn in 2015 (WTTC, 2014) [21]. The direct contribution of travel and tourism to GDP is expected to grow by 5.8% pa to NGN2, 797.3bn (1.7% of GDP) by 2025 (WTTC, 2015).

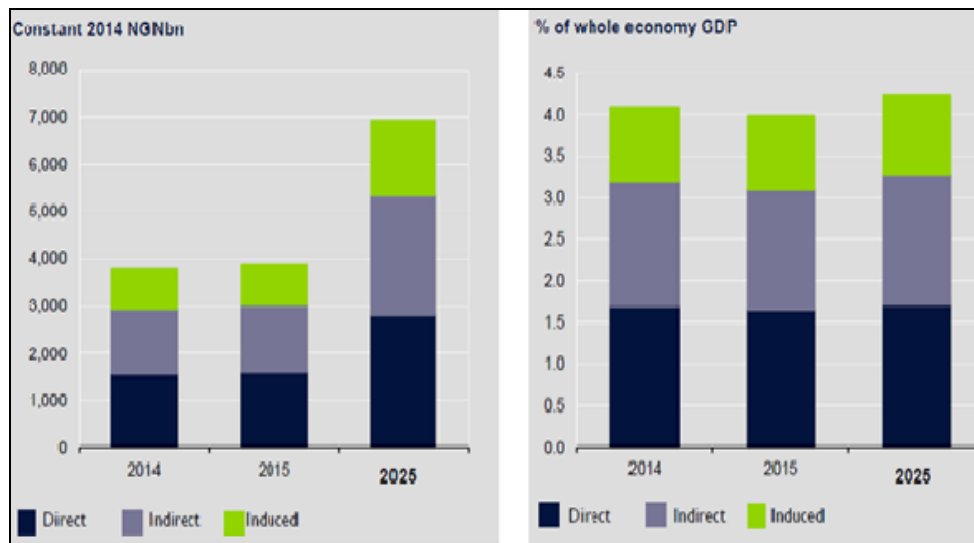


Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

Fig 2: Direct Contribution of Travel & Tourism to GDP

According to WTTC, (2014) [21], the total contribution of travel and tourism to GDP was NGN1, 559.5 bn in 2013 (3.2% of GDP) and is expected to grow by 1.9% to NGN1, 589.6bn (3.1% of GDP in 2014). There was a positive increase from the forecast as the total contribution of travel and

tourism to GDP was NGN3, 766.1bn in 2014 (4.1% of GDP) and is expected to grow by 2.5% to NGN3, 859.3bn (4.0% of GDP) in 2015. It is forecast to rise by 6.0% pa to NGN6, 908.8bn by 2025 (4.2% of GDP) (WTTC, 2015).



Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

Fig 3: Total Contribution of Travel & Tourism to GDP

Generally speaking, there is an increasing and widely accepted belief that tourism can promote and cause long-run economic growth. This is known in many literatures as the tourism-led growth hypothesis. In the work of Samimi *et al* (2011) ^[14], the tourism-led growth hypothesis was confirmed, as there was a bilateral causality and positive long-run relationship between economic growth and Tourism development. Giap, *et al* (2016) ^[8] confirmed tourism-led growth hypothesis in their work in Malaysia. Havi, (2013) ^[9] confirmed it in Ghana, Bayramoglu and Ari (2014) ^[4] confirmed that there was a strong unidirectional causality from the expenditures of foreign tourists who visited Greece to the growth of Greece. Alhwaish (2016) in his work on tourism and economic growth in Gulf Cooperation Council (GCC) countries and the results show a one-way Granger Causality, from economic growth to tourism growth. Yusuff and Akinde (2015) ^[22] confirmed also that there was a unilateral causality and positive long-run between tourism development and economic growth in Nigeria.

Tourism and Foreign Exchange Generation

Tourism has grown to become one of the most significant export sectors in many developed and developing countries of the world. It is widely acknowledged as an agent of economic development as it not only increases foreign exchange income, but also creates employment opportunities, stimulates the growth of the tourism industry and by virtue of this, triggers overall economic growth (Samimi *et al*, 2013). Tourism (domestic, inbound or outbound) is considered as an important variable that promotes economic growth through fiscal earnings and revenue generation to any country (Eziocha, Ohaka & Dagogo, 2015). It is equally a principal export for 83 percent of developing countries and the most significant source of foreign exchange after petroleum (Robert, 2010; Eziocha *et al*. 2015).

International tourism receipts are expenditure by international

inbound visitors, including payments to national carriers for international transport. These receipts include any other prepayment made for goods and services received in the destination country. They also may include receipts from same-day visitors, except when these are important enough to justify separate classification (World Bank, 2015).

An ever-increasing number of destinations worldwide have opened up to, and invested in tourism, turning it into a key driver of socio-economic progress especially in the area of export revenues. Over the past six decades, tourism has experienced continued expansion and diversification to become one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favourites of Europe and North America. It has boasted virtually uninterrupted growth overtime, despite occasional shocks, demonstrating the sector's strength and resilience. International tourist arrivals have increased from 25 million globally in 1950 to 278 million in 1980, 674 million in 2000, and 1, 126 million in 2015. In the same vein, international tourism receipts earned by destinations worldwide have surged from US\$2 billion in 1950 to US\$104 billion in 1980, US\$495 billion in 2000, and US\$1, 260 billion in 2015 (UNWTO, 2016).

Tourism as a major category of international trade in services, have also generated US\$211 billion in exports through international passenger transport services rendered to non-residents in 2015, bringing the total value of tourism exports up to US\$1.5 trillion, or US\$4 billion a day on average. International tourism now represents 7% of the world's exports in goods and services, up from 6% in 2014, as tourism has grown faster than world trade over the past four years. As a worldwide export category, tourism ranks third after fuels and chemicals and ahead of food and automotive products. In many developing countries, tourism ranks the first export sector (UNWTO, 2016).

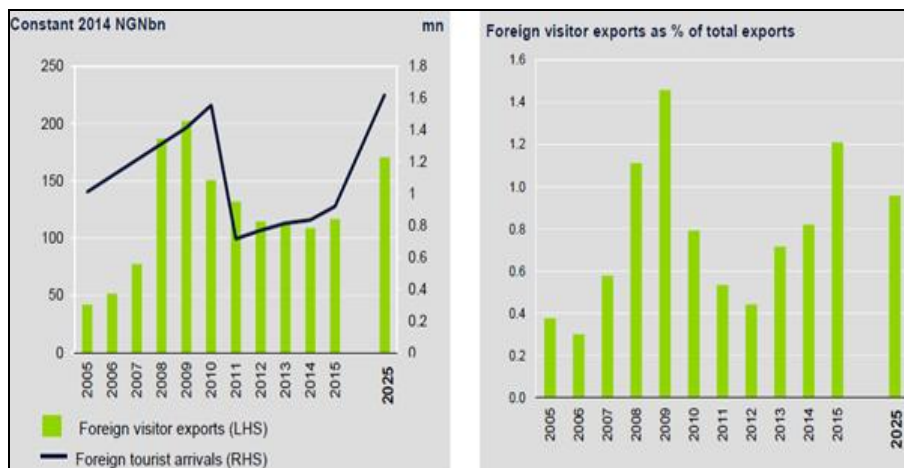
Table 1: Tourism Receipts of Nigeria (\$m)

Date	Value	Change %
2014	601,000,000	-2.44
2013	616,000,000	-3.60
2012	639,000,000	-7.12
2011	688,000,000	-6.52
2010	736,000,000	-6.95
2009	791,000,000	-17.52
2008	959,000,000	184.57
2007	337,000,000	61.24
2006	209,000,000	50.36
2005	139,000,000	183.67
2004	49,000,000	15.52

Source: [http: Knowena.com/atlas/Nigeria/Tourism-receipts](http://Knowena.com/atlas/Nigeria/Tourism-receipts)

Visitors' exports are key components of the direct contribution of Travel and Tourism. In 2013, Nigeria generated NGN107.1bn in visitor exports and this is expected to fall by 0.9% in 2014 and the country is expected to attract 900,000 international tourist arrivals (WTTC, 2014) [21]. In WTTC report of 2015, Nigeria generated NGN108.8bn in

visitor exports in 2014 and it is expected to grow by 7.1% and the country is expected to attract 919,000 international tourist arrivals. By 2025, international tourist arrivals are forecast to total 1,621,000; generating expenditure of NGN170.7bn, an increase of 3.9% pa (WTTC, 2015).



Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

Fig 4: Travel and Tourism Contribution to GDP: Domestic vs. Foreign, 2014

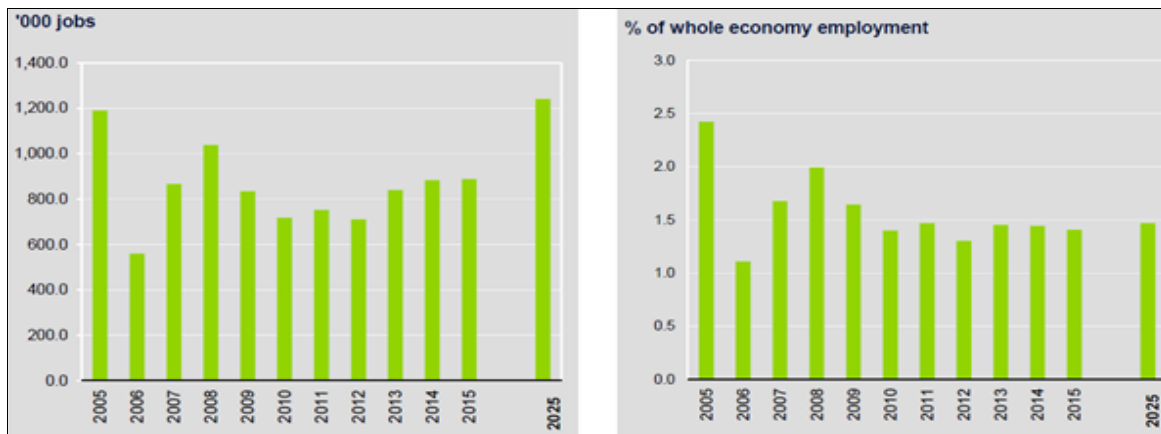
Tourism and Employment

Increasing tourism flows can bring many positive economic consequences to the host countries, particularly on GDP, employment and foreign trade (Pavlic, Tolic & Svilokos, 2013) [11]. Travel and tourism generated US\$7.6 trillion (10% of global GDP) and 277 million jobs (1 in 11 jobs) for the global economy in 2014 and recent years have seen the sector growing at a faster rate than both the wider economy and other significant sectors such as automotive, financial services and health care. The international arrivals also surged, watching nearly 1.14 billion and visitors spending more than matched that growth (WTTC, 2015).

Tourism is labour intensive and tourism workers are very important for the guests' impression of the host country. Therefore, it is of extreme importance to employ skilled workers (Pavlic, et al; 2013) [11]. Tourist arrivals create jobs directly in the hospitality industry; but through its indirect effects it also induces secondary employment in many tourism

supportive sectors. The majority of the employees in the hospitality industry are young people, under 25, and in addition most of them are women (Vellas, 2011; Pavlic et al; 2013) [11].

In Nigeria, Travel and Tourism generated 866,000 jobs in 2013 (1.3% of total employment) and this was forecast to fall by 0.8% in 2014 to 859,000 (WTTC, 2014) [21]. On the contrary, Travel and Tourism generated 883,500 jobs directly in 2014 (1.4% of total employment) and this is forecast to grow by 0.6% in 2015 to 888,500 (1.4% 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 restaurants and leisure industries directly supported by tourists. By 2023, Travel and Tourism will account for 1 240,000 jobs directly, an increase of 3.4% pa over the next ten years (WTTC, 2015).



Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

Fig 5: Direct Contribution of Travel and Tourism to Employment

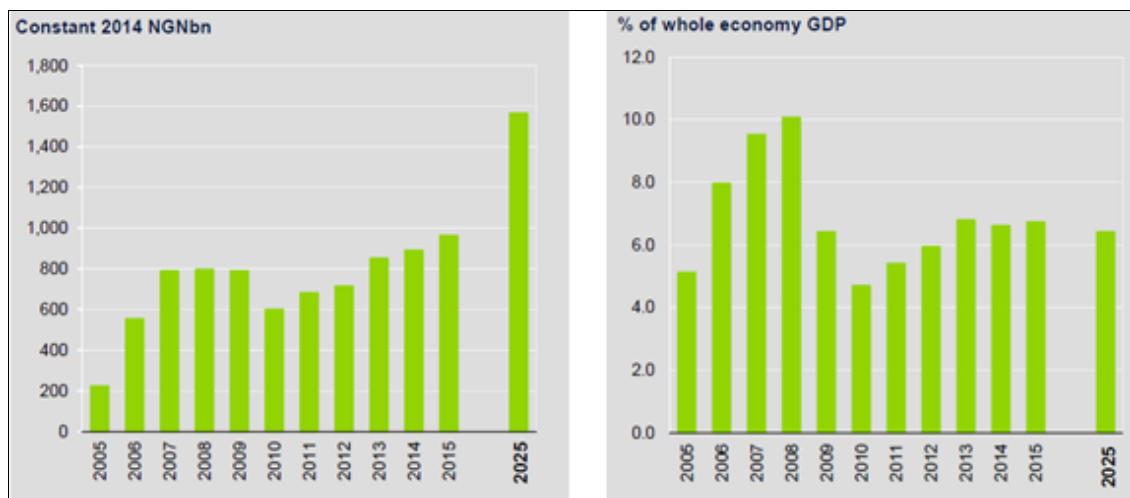
According to WTTC (2014)^[21] the total contribution of travel and tourism to employment (including wider effects from investment, the supply chain and induced income impacts) was 1,837,000 jobs in 2013 (2.8% of total employment). On the contrary, as reported by WTTC (2015), the total contribution of travel and tourism to employment was 2,198,500 jobs in 2014 (3.6% of total employment). This is forecast to rise by 0.6% in 2015 to 2,212,500 jobs (3.5% of total employment), and by 2025, travel and tourism is forecast to support 3,148,000 jobs (3.7% of total employment) an increase of 3.6% pa over the period.

Various authors have theoretically established a strong link between tourist arrivals and employment generations (WTTC, 2013, 2014, 2015; WEF, 2013; WTO, 2014; Pavlic *et al.*, 2013; Zaei & Zaei, 2013; Samimi, Sadeghi & Sadeghi, 2013; Alhawaish, 2016; Polat, Turkan & Gunay, 2010; Havi, 2013;

Bayramoglu & Ari, 2014; Yusuff & Akinde, 2015; Giap, Gopalan & Ye, 2016; Jovanovic & Ilic, 2016)^[21, 13, 23, 20 11, 9, 4, 22, 8]. This shows that destination packaging should be encouraged to enable the government of the country tackle the high level of unemployment in Nigeria.

Tourism and Investment

Travel and Tourism is expected to have attracted capital investment of NGN 264.2bn in 2013. This was expected to rise by 1.0% in 2014 (WTTC, 2014)^[21]. In 2014, the industry attracted capital investment of NGN 889.3bn which shows a sharp increase from 2013 figure. This is expected to rise by 8.3% in 2015, and rise by 5.0% pa over the next ten years to NGN1,563.9bn in 2025. Travel and Tourism’s share of total national investment will fall from 6.7% in 2015 to 6.4% in 2025 (WTTC, 2015).



Source: WTTC Travel & Tourism Economic Impact 2015. NIGERIA

Fig 6: Nigeria: Capital Investment in Travel and Tourism

The Travel and Tourism Competitiveness Index Model

First compiled in 2007, the travel and tourism competitiveness index (TTCI) measures the set of factors and policies that

enable the sustainable development of the travel and tourism sector, which in turn, contributes to the development and competitiveness of a country (WEF, 2017)^[17].



Sources: World Economic Forum (2015). Travel & Tourism Competitiveness Index.

Fig 6: The T & T Competitiveness index 2015

The Travel and Tourism Competitiveness Index ranking 2015 covers 141 economies worldwide. Table shows the overall ranking, based on 14 pillars and sub-indexes. From the table above, Spain leads the 2015 TTCI ranking for the first time and Europe with a total of six countries in the top 10 is confirmed as the region with the most T&T competitive economies. Nigeria ranks 131st just above ten other counties, showing that the country is not competitive even with other

countries in the Sub- Saharan Africa.

Methodology

The secondary data approach was used to gather relevant data and information used for this study. Values of the 14 pillars in the competitiveness index were used to discuss the performance of Nigeria and countries from Sub-Sahara Africa.

Data presentation and discussion of findings

Table 2: Travel and Tourism Competitiveness Index covering the 14 pillars: Sub-Sahara Africa

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
EASTERN AND SOUTHERN AFRICA							
South Africa	1	48	5.35	4.30	3.85	4.09	4.29
Seychelles	2	54	4.63	5.09	5.49	4.62	4.17
Mauritius	3	56	5.19	5.91	5.31	4.75	4.22
Namibia	4	70	4.76	5.02	3.70	3.80	3.82
Kenya	5	78	4.33	3.78	3.29	4.44	3.13
Botswana	7	88	4.86	5.15	3.50	4.20	3.74
Tanzania	8	93	3.97	4.85	2.68	4.03	2.48
Rwanda	9	98	5.13	5.58	3.92	4.36	2.93
Zambia	10	107	4.75	5.40	2.44	4.99	2.51
Swaziland	11	108	4.45	4.65	3.19	3.70	3.00
Uganda	14	114	3.87	4.62	2.72	4.11	2.72
Zimbabwe	15	115	2.97	5.31	3.00	3.83	2.82
Ethiopia	17	118	3.90	5.18	4.35	3.63	1.88
Madagascar	19	121	3.87	4.66	3.28	3.85	2.36
Malawi	22	126	4.03	5.41	2.44	4.18	2.55
Lesotho	24	129	4.23	4.42	2.93	3.91	2.47
Mozambique	25	130	4.23	4.50	1.97	3.57	1.94
Burundi	28	135	3.78	4.55	3.91	3.61	1.90
Eastern and Southern Africa average			4.36	4.91	3.44	4.09	2.94
Eastern and Southern Africa standard deviation			0.60	0.53	0.94	0.41	0.80
CENTRAL AND WEST AFRICA							
Cape Verde	6	86	4.42	5.18	4.64	4.39	3.52
Gambia, The	12	109	4.06	5.61	3.42	4.12	2.74
Senegal	13	112	4.11	5.41	3.13	3.63	3.02
Côte d'Ivoire	16	117	4.13	4.68	3.08	3.29	2.94
Ghana	18	120	4.58	4.96	3.09	4.35	3.05
Cameroon	20	122	3.96	5.29	3.32	4.20	1.89
Gabon	21	124	4.18	5.22	4.19	3.61	2.85
Mali	23	128	3.90	4.15	3.02	3.26	2.28
Nigeria	26	131	4.11	2.65	2.79	3.54	2.81
Sierra Leone	27	132	4.12	5.18	2.93	3.61	1.98
Mauritania	30	137	3.46	5.06	3.03	2.30	2.18
Angola	31	139	3.03	4.73	3.23	2.79	2.37
Guinea	32	140	3.38	4.95	2.51	3.19	1.94
Chad	33	141	2.80	4.36	2.49	2.73	1.31
Central and West Africa average			3.89	4.82	3.18	3.49	2.44
Central and West Africa standard deviation			0.50	0.71	0.57	0.61	0.61
Sub-Saharan Africa average			4.14	4.87	3.32	3.82	2.71
Best performer (global)			6.13	6.70	6.97	5.64	6.37

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
EASTERN AND SOUTHERN AFRICA									
South Africa	4.88	2.38	4.99	4.29	3.28	3.59	5.02	4.28	3.39
Seychelles	5.78	2.73	3.68	5.17	4.30	4.76	5.95	2.65	1.03
Mauritius	5.96	3.42	3.91	4.67	2.95	4.77	5.45	2.03	1.26
Namibia	4.51	2.62	5.20	4.41	3.03	3.68	4.75	3.94	1.12
Kenya	5.36	3.01	4.50	4.42	2.56	3.36	3.30	4.63	1.67
Botswana	4.33	2.12	5.44	4.42	2.27	2.82	3.47	3.59	1.35
Tanzania	4.83	3.25	4.87	3.78	1.94	2.56	2.70	4.91	1.54
Rwanda	4.29	2.93	4.61	4.68	1.84	3.85	2.52	2.75	1.27
Zambia	4.07	2.30	4.92	4.16	1.93	2.80	2.94	3.58	1.28
Swaziland	4.28	2.96	5.49	4.48	3.03	3.49	2.88	2.16	1.02
Uganda	4.04	3.03	4.82	3.96	1.81	2.65	2.61	3.51	1.50
Zimbabwe	3.87	2.22	4.96	4.18	1.79	2.74	2.84	3.51	1.46
Ethiopia	3.75	2.57	4.65	4.00	2.27	2.51	2.23	3.00	1.50
Madagascar	4.47	2.97	4.91	3.46	1.87	2.38	2.91	2.65	1.39
Malawi	3.46	2.03	4.69	4.01	1.51	2.62	2.54	2.93	1.30
Lesotho	4.03	1.66	5.27	3.87	1.59	2.83	3.01	1.98	1.02
Mozambique	3.78	3.05	4.36	3.93	1.78	2.27	2.84	2.61	1.25
Burundi	2.45	3.15	5.02	3.78	1.64	2.80	1.90	1.91	1.14
Eastern and Southern Africa average	4.34	2.69	4.79	4.20	2.30	3.14	3.33	3.15	1.42
Eastern and Southern Africa standard deviation	0.83	0.48	0.47	0.41	0.75	0.75	1.16	0.91	0.53
CENTRAL AND WEST AFRICA									
Cape Verde	4.52	3.13	4.48	4.32	3.63	3.42	4.56	1.83	1.05
Gambia, The	4.88	2.02	5.90	4.49	1.99	3.66	2.67	2.23	1.16
Senegal	3.79	3.07	3.56	4.36	2.03	2.89	3.38	3.04	1.43
Côte d'Ivoire	3.31	1.76	4.46	4.09	2.04	3.31	3.26	3.30	1.27
Ghana	3.46	1.90	4.32	3.99	2.07	3.11	2.55	2.57	1.47
Cameroon	3.42	1.80	4.83	3.93	1.79	2.60	2.59	3.18	1.29
Gabon	3.00	1.34	4.99	4.30	2.03	2.14	2.68	2.80	1.18
Mali	3.93	2.91	4.24	4.55	1.75	2.64	2.57	2.09	1.74
Nigeria	3.34	1.85	4.38	3.86	2.02	2.42	2.70	2.69	1.80
Sierra Leone	3.94	1.84	4.89	3.77	1.51	2.79	1.98	2.38	1.29
Mauritania	3.12	2.94	4.82	4.15	1.59	1.96	2.37	2.12	1.11
Angola	2.67	1.29	5.46	3.41	1.96	2.07	2.44	2.34	1.24
Guinea	2.96	1.75	4.32	3.81	1.54	2.09	1.94	2.76	1.33
Chad	3.57	1.66	3.76	4.34	1.42	2.13	2.09	2.49	1.03
Central and West Africa average	3.56	2.06	4.60	4.12	1.93	2.62	2.67	2.53	1.31
Central and West Africa standard deviation	0.58	0.63	0.59	0.32	0.52	0.56	0.66	0.43	0.22
Sub-Saharan Africa average	3.99	2.40	4.71	4.17	2.13	2.90	3.03	2.87	1.37
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

Sources: World Economic Forum (2015). The T & T Competitiveness Index 2015. World Economic Forum Publications

Table 2 above shows the travel and tourism competitiveness index of countries in Sub-Saharan Africa. The index is grouped into four main headings and 14 pillars of sub-indexes. From the table, Nigeria attains the 26th in regional ranking and 131st position overall. South Africa rank 1st in the region and 48th globally.

On enabling environment pillars, Nigeria’s value on business environment was 4.11; safety and security, 2.65; health and hygiene, 2.79; human resources and labour market, 3.54; ICT readiness, 2.81. The enabling environment for tourism to thrive and attract more tourists both domestic and international tourists is not performing well to be compared to top tourists’ destination in the region like South Africa. Only business environment and human resources and labour market scored above average. Safety and security, health and hygiene and ICT readiness scored below average.

On travel and tourism policy and enabling conditions, prioritization of travel and tourism was 3.34; international openness, 1.85; price competitiveness, 4.38; environmental sustainability, 3.86. The travel and tourism policy and enabling conditions performance was not too encouraging. Though the price competitiveness, environmental sustainability and prioritization of travel and tourism scored above average, the international openness that many nations in the region are advocating for and adopting performed poorly

with a value of 1.85. This, we believe, has affected the number of international tourist arrivals to Nigeria.

Infrastructure pillars posted poor performance under the year covered. Air transport infrastructure scored 2.02; ground and port infrastructure, 2.42; and tourist service infrastructure was 2.70. Looking at the performance of South Africa under this pillar, especially on the tourist service infrastructure with a score of 5.02. It shows lack of investment in tourist service infrastructure in Nigeria and it equally affects the number of arrivals to Nigeria.

On natural and cultural resources pillars, it was surprising to see a score of 2.69, which is below average; cultural resources and business travel scored 1.80. Despite the abundance of natural and cultural resources in Nigeria, packaging, protection and conservation of the resources have become a major challenge facing tourism development in Nigeria.

Summary of findings

The results based on the descriptive statistics and literature search revealed the following:

- The business environment pillar of the Nigeria travel and tourism competitiveness index recorded a score of 4.11, which is above average but less than 5.35 recorded by South Africa the industry leader for the year under review.
- Safety and security pillar for Nigeria recorded below

average with a score of 2.65. Nigeria over the years is faced with numerous security challenges, especially in the area of terrorism, herdsmen attacks and kidnapping.

- Health and hygiene pillar recorded a value of 2.79 which is below average. The health sector is equally experiencing some challenges. Most hospitals and health centres in the rural community lack modern equipment and affordable drugs.
- Human resources and labour market pillar scored 3.54 which is above average. Nigeria boast of great number of skilled and unskilled labour ready to be absorbed into the industry.
- ICT readiness for the country was valued at 2.81. This pillar covers ICT use for biz-to-biz transactions, internet usage, quality of electricity, etc.
- Prioritization of travel and tourism had a score of 3.34, which is above average but not as high top competing destinations like South Africa. Government expenditure on travel and tourism is not encouraging and it is affecting number of international tourist arrivals and tourism receipts.
- International openness was so poor with a rank of 1.85. This includes, visa requirements and openness to bilateral agreements.
- Price competitiveness recorded a score of 4.38 which is above average. It shows the strength of tourism industry in Nigeria. This includes, ticket prices and hotel accommodation which are fair as compared to other top destinations.
- Environmental sustainability also recorded above average with a score of 3.86. This includes, stringency of environmental regulations, enforcement of environmental regulations, etc.
- On infrastructure pillars, air transport, ground and port infrastructure and tourist service infrastructure scored 2.02, 2.42, and 2.70 respectively. These scores are below average and shows that the country is not doing enough to improve infrastructure to enhance international tourist arrivals.
- Natural and cultural resources pillars recorded scores below the average. Natural resources scored 2.69, while cultural resources and business travel scored 1.80. This shows that our cultural resources are not being harnessed and packaged for international consumption.

Conclusion

Nigeria as one of the competing destinations in Sub-Saharan Africa is still struggling with tourism development. As a destination, efforts put in place to package tourism offerings have not been encouraging as compared to other leading destinations in the region. Available data show that tourism does not play a very important role in the Nigeria's economy, accounting for only approximately 1.5% of GDP and employment and it is not high on the government agenda, ranking 131st in terms of T&T prioritization. Given Nigeria's cultural resources (57th) and natural assets, the country's limited development of tourism industry appears to be a missed opportunity for diversifying the economy and creating employment opportunities. For proper tourism development in a country, there is need for the government to prioritize the

sector through policy framework, and in doing so, it provides direction for the private sector to follow.

Recommendations

Based on the findings, this study suggests the following recommendations:

- Government at all levels, should prioritize travel and tourism industry due to its multiplier effects on the economy.
- Security situation in Nigeria is worrisome and urgent attention should be paid by the government to tackle the security challenges.
- Government should work out modalities in conjunction with community heads on how to promote cultural resources in the area.
- Government should do more in the area of safety and hygiene, ICT readiness, infrastructural development and aggressive marketing to promote attractions sites and attract tourists.

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