



TOURISM IN THE PALOP COUNTRIES AND RELATIONS WITH PORTUGAL

TURISMO NOS PALOP E RELAÇÕES COM PORTUGAL

RESUMO O turismo tem-se vindo a desenvolver de forma consistente ao longo dos anos praticamente em todas as regiões do mundo. África é uma das regiões onde se espera que venha a aumentar a sua quota de mercado. Desta forma, os Países Africanos de Língua Oficial Portuguesa (PALOP) têm uma oportunidade de desenvolver uma actividade que poderá ser estratégica, caso consigam preparar-se adequadamente para este desafio. Este documento reflecte sobre algumas das principais linhas de orientação que deverão ser adoptadas para atingir melhores resultados.

ABSTRACT Tourism has been developing in a consistent way along the years in almost every regions of the world. Africa is one of the regions where it is expected to growth its market quota. So, African Countries of Portuguese Official Language (PALOP) have an opportunity of developing an activity that may become strategic, if they can properly prepare themselves to this challenge. This document reflects on some of the main goal lines that should be improved to achieve better results.

PALAVRAS-CHAVE

Turismo, PALOP, Sustentabilidade,
Índice de Penetração do Turismo

KEYWORDS

Tourism, PALOP, Sustainability,
Tourism Penetration Index

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INTRODUCTION

This study intends to make a critical analysis about the potential as well as the vulnerabilities of tourism activity in PALOP countries in the last years and simultaneously to reflect about the main future challenges of a tourist strategy in these countries.

In order to achieve this goal, we have chosen to implement a qualitative analysis and we will build some indicators that will not only compare these countries among themselves, but it will validate their future options of (in)success.

As said above, our sample will be composed by the designated PALOP countries that are former Portuguese ex-colonies: Angola, Cape Verde, Guinea Bissau, Mozambique and São Tomé and Príncipe.

Given the specificities of each country, we will primarily list some of the main characteristics of each one and only then reflect and analyze their tourism strategies and opportunities.

1. INTERNATIONAL TOURISM IN REVUE

International tourism has often been described by numerous authors as an activity with a potential key to achieve new patterns of development, prosperity and well-being of nations. Various factors can contribute in

different ways to this situation, but some are more traditional. The overall export income generated by inbound tourism, including passengers transport, exceeded US\$ 1 trillion in 2009, or close to US\$ 3 billion a day (UNWTO, 2011). Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services (UNWTO, 2011).

Globally, if we look at tourism as an export category, this activity ranks fourth only after fuels, chemicals and automotive products. For many developing countries this is one of the main sources for foreign exchange income and the number one export category, contributing to the creations of many employment and opportunities and for the development.

The contribution of tourism to economic activity worldwide is estimated at some 5% (UNWTO, 2011). Tourism's contribution to employment tends to be slightly higher relatively and is estimated in the order of 6-7% of the overall number of jobs worldwide (direct and indirect) (UNWTO, 2011).

Besides these numbers, we can also stress some others trends that happened in 2010. In the short term:

- A steady growth for international tourism, after several months of decline.
- According to the August 2010 Interim Update of the UNWTO World Tourism Barometer, worldwide international tourist arrivals increased by 7% between January and June 2010 compared to the depressed levels of the same period of 2009, which means that the recovery trend that started in the last quarter of 2009 is being kept.

In the long-term trend:

- 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 and various more can still emerge alongside the traditional ones of Europe and North America.



- Apart from some occasional shocks or specific situations, international tourist arrivals have shown virtually uninterrupted growth¹.
- As growth has been particularly fast in the world's emerging regions, the share in international tourist arrivals received by emerging and developing countries has steadily risen, from 32% in 1990 to 47% in 2009.
- By 2020 international arrivals are expected to reach 1.6 billion.

GRAPHIC 1. EVOLUTION OF INTERNATIONAL INBOUND TOURISM



Source: World Tourism Organization (2011) and Worldbank (2008)

In 2009 and 2010 several economies worldwide were strongly affected by several crisis and events. We can shortly stress the international and persistent economic uncertainty, social and political crisis in various countries, the serious disruption of air travel following the volcanic eruption in Iceland in April as well as the problematic weather conditions in various parts of the world. All these issues had a nocive impact in tourism flows

that declined almost 4% from 2008 to 2009 (the year hardest hit by the global economic crisis). During 2010 international tourism arrivals recovered significantly achieving 935 million tourists (it grew by almost 7% and represented more 58 million tourists). The vast majority of destinations worldwide posted positive figures but the recovery path came at different speeds and was primarily achieved by emerging economies (UNWTO, 2011). Following a year of global recovery in 2010, previsions for 2011 international tourism arrivals and after expects to maintain the growth but at a slower pace. UNWTO forecasts of international tourist arrivals by region expect to grow at between 4% to 5% in 2011, a rate slightly above the long-term average (UNWTO, 2011).

TABLE 1. INTERNATIONAL TOURISM ARRIVALS 2011 (FORECAST)

	2010	FORECAST 2011
World	6,7%	4% - 5%
Europe	3,2%	2% - 4%
Asia and Pacific	12,6%	7% - 9%
Americas	7,7%	4% - 6%
Africa	6,4%	4% - 7%
Middle East	13,9%	7% - 10%

Source: World Tourism Organization (2011)

In 2010 international tourist arrivals kept the growth, especially in the emerging economies (almost +8%). In the advanced economies the growth was just about +5% (UNWTO, 2011). Of course, the main challenge is to benefit from this situation, mainly in the developing countries, is to consolidate this growth, create jobs and revenues for the economy and the population. In terms of regions, we can expect the following situation (UNWTO, 2011):

- Asia (+13% growth). This was the first region to recover from the global crisis in 2010. International tourist arrivals into Asia reached a new

¹ From 25 million in 1950, to 277 million in 1980, to 438 million in 1990, to 681 million in 2000, and the current 880 million (UNDP, 2011).



record at 204 million last year, up from 181 million in 2009.

- In Europe (+3% to 471 million) the recovery was slower than in other regions due to the air traffic disruption caused by the eruption of the Eyjafjallajokull volcano and the economic uncertainty that strongly affected the euro zone. However, tourism activity managed to recover from the second half of the year. Even though, this was not enough to bring overall results above the losses of 2009.
- Americas (+8% to 151 million) were successful in

recovering from the decline in 2009, mainly caused by the economic hardship in North America and the impact of the influenza A(H1N1) outbreak.

This recovery can be partially explained by the return to growth from the US economy.

- In the Middle East (+14% to 60 million) almost all destinations grew by 10% or more.
- Finally, Africa (+6% to 49 million). This was the only region that managed to meet positive numbers in 2009 and that is expected to maintain this growth during 2010.

TABLE 2. INTERNATIONAL TOURIST ARRIVALS (AFRICA AND WORLD)

YEAR	MILLION ARRIVALS	AFRICA MARKET SHARE (% OF WORLD ARRIVALS)	AVERAGE ANNUAL GROWTH RATE (%)		PERIOD
			WORLD	AFRICA	
1980	7,3	2,6	5,6	11,8	1970-1980
1990	15	3,3	4,8	7,4	1980-1990
1995	20,2	3,6	4,3	6,1	1990-1995
1998	24,9	3,9	4	7,4	1995-1998
2011	49	4,7	4,2	5,6	2000-2010
2020	77,3	5	4,5	5,1	2010-2020

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2011	49	4,7	4,2	5,6	2000-2010
2020	77,3	5	4,5	5,1	2010-2020

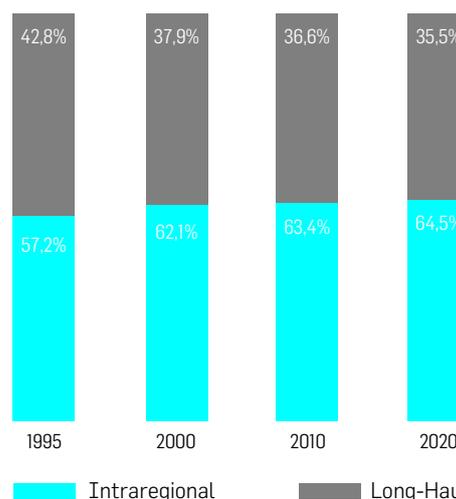
Source: WTO (Various years)

Although Africa has little weight in terms of international quota of arrivals, it has been consistently outperformed the world as a whole. Thus, in 30 years, total arrivals in Africa reached 49 million, almost seven times the level of 1980.

There have been major differences among the different Africa's subregions.

Long-haul travel to Africa is expected to rise over the years. By 2020 intraregional trips are expected to be almost twice than long-haul.

GRAPHIC 2. INTERNATIONAL TOURIST ARRIVALS TO AFRICA



Source: WTO (Various years)

These inbound tourists come mainly from Africa, meaning that PALOP countries must be adapt their strategy to this new reality.

TABLE 3. INTERNATIONAL TOURIST ARRIVALS TO AFRICA BY GENERATING REGION (%)

ANOS	1990	1995	2000	2020
TOTAL	100	100	100	100
Africa	37	42,4	48,3	53,2
Americas	3	3,2	2,9	3
East Asia/Pacific	1,5	2,3	1,9	3,2
Europe	35,9	33	29,2	25,4
Middle East	6,6	3,9	3,7	3,5
South Asia	0,3	0,3	0,3	0,5
Not specified	15,7	14,9	13,8	11,2

Source: WTO (Various years)

2. PALOP COUNTRIES AT A GLANCE

Before we discuss the tourism potential we will present some main characteristics of the countries that constitute our sample. Each country has natural and potential touristic resources that can be developed and explored in order to develop an efficient touristic strategy. In a few words, we can stress some main characteristics that show us the potential for tourism.

HISTORY

During the colonial occupation, it was recognized that tourism had a great potential in these countries. How-

ever, during this period little was done in order to materialize this potential.

So, by the time of decolonization, the few hotels that existed were abandoned by its old proprietors (MHT, 2004). Everywhere, the touristic facilities and infrastructures were very obsolete and needed several improvements in order to work properly. Besides this, in Angola and Mozambique there were civil wars that deeply affected these countries not only in terms of tourism development but also in economic and social terms.

CLIMATE

All these countries are located in a sub tropical zone. Therefore, even though we find different climates and different distinct seasons, the climate in each country can be described as tempered. Of course we can find some rain seasons mainly in Mozambique and Angola, but climate is adequate to the development of Sea, Sand and Sun tourism.

BEACHES

All countries benefit from an important attraction to the tourism flows: several exotic and unspoiled beaches along the coastline. These beaches can be visited all year round due to the climatic conditions. However, they are most visited during the called hot season.

LANDSCAPES

The orography and the climatic characteristics of the land provide these countries with a vast diversity of animal and vegetable species. Of course, Angola and Mozambique have the most important forests and national parks in the world. Their dense, humid forestland, are rich in exotic woods and the natural habitat of gorillas, the African antelope, elephants, the chacal, gnus, zebras, rhinoceros, lions and many other unique species. In the coastline, we often find various eggs laying ground for the sea turtles.

CULTURE

Each country is provided by a strong cultural heritage. Local traditional music, dances, art, local handcraft, gastronomy among other typical things can be easily found everywhere and are extremely important to their touristic image.

GEOGRAPHY

In terms of territory and coastline dimension, we find significant differences among these countries in terms of coastal areas as well as land areas, as we can see in the next table.

TABLE 4. TOTAL AREA AND COASTLINE

	TOTAL AREA (Km ²)	COASTLINE (Km)
Angola	1.246.700	1.600
Cape Verde	4.033	965
Guinea-Bissau	36.125	350
Mozambique	799.380	2.750
São Tomé and Príncipe	997	209

Source: CIA (2011)

Due to their dimension and his past, it is natural that each country faces a different population rate. As expected, the biggest countries in terrestrial dimension have the biggest population levels.

TABLE 5. TOTAL POPULATION (THOUSAND)

	1980	1990	2010
Angola	7.854.000	10.661.000	18.993.000
Cape Verde	289.000	354.000	513.000
Guinea-Bissau	836.000	1.022.000	1.647.000
Mozambique	12.138.000	13.543.000	23.406.000
São Tomé and Príncipe	95.000	116.000	165.000

Source: United Nations (2011)

Despite the population growth rate in every country, if we analyze the population density, the obtained values are nowadays irrelevant, meaning that there is an opportunity to tourism development in a sustainable way, at least in the next years.

TABLE 6. POPULATION DENSITY²

	TOTAL AREA			COASTLINE		
	1980	1990	2009	1980	1990	2009
Angola	6	9	15	2454	3332	5781
Cape Verde	72	88	125	299	367	524
Guinea-Bissau	23	28	44	2389	2920	4571
Mozambique	15	17	29	2207	2462	4164
São Tomé and Príncipe	95	116	163	455	555	780

Source: Calculated by the author

An interesting conclusion is that every country of the sample is not yet affected by increase of tourist activity since the total density is almost negligenciabile. Naturally, in coast regions or coast areas, we expect to have a bigger or more intense pressure, but as we just said not in a very problematic way.

If tourism grows as expected by the local Governments, then they will have to prepare themselves to deal with some potential problems such as the adequate management of the tourism pressure in the peak moments and the right deal with the seasonality (mainly during the summer).

Due to some territorial misdistribution of populations as consequence of the civil war, especially in Angola (ended in 2002) and Mozambique (the "sixteen year war" ended in 1992), tourism can play a strategic role not only in terms of territorial planning but as well as a way of fixing rural populations outside the urban areas. All countries suffer from this problem, but historically it has been worse in the former two countries because of the dimension of the population.

² Population/Total area (or coast line). In the case of Angola and Mozambique, due to its dimension we assumed that only 50% of the total population could have direct impact in the coastline. In the other countries, since it is very easy to reach the coast, we assumed that everyone should be considered.

TABLE 7. HUMAN DEVELOPMENT INDEX TRENDS, 1980-2010

HDI RANK / COUNTRY	HUMAN DEVELOPMENT INDEX (VALUE)						HDI RANK (CHANGE)		
	1980	1990	1995	2000	2005	2009	2010	2005-2010	2009-2010
MEDIUM HUMAN DEVELOPMENT									
118 Cape Verde	0,5	0,519	0,531	0,534	-1	0
127 São Tomé and Príncipe	0,466	0,485	0,488	-3	-1
LOW HUMAN DEVELOPMENT									
146 Angola	0,349	0,376	0,399	0,403	2	1
164 Guinea Bissau	0,278	0,286	0,289	-1	0
165 Mozambique	0,195	0,178	0,186	0,224	0,263	0,28	0,284	0	0

Source: UNDP (2010).

In terms of IDH³, these countries are among the 169 countries analyzed by the UNDP yearly report. Two of them are considered as Medium Human Development (Cape Verde and São Tomé and Príncipe) while the remaining three are considered as low human development. As this indicator integrates significant different measures (from well being, to economic, political health,

human privation, education, and many other) this imposes a considerable challenge to tourism activity in every country, since it must be carefully faced by local authorities in order to fully benefit from it and in order to improve its HDI ranking, that is a well being indicator of the society. As we saw, all these countries have been more or less stable in the HDI rank during the years.

TABLE 8. GENDER INEQUALITY INDEX

HDI RANK / COUNTRY	SEATS IN PARLIAMENT (%)		LABOUR FORCE PARTICIPATION RATE (%)	
	FEMALE	MALE	FEMALE	MALE
MEDIUM HUMAN DEVELOPMENT				
Cape Verde	18,1	81,9	56,2	82,7
São Tomé and Príncipe	7,3	92,7	46,9	78,5
LOW HUMAN DEVELOPMENT				
Angola	..	..	76,3	89,2
Guinea-Bissau	10	90	61,2	85,4
Mozambique	34,8	65,2	85,7	86,6

Source: UNDP (2010).

³ Measuring human development

Empirical measure	Components of Human Development				
	Health	Education	Material goods	Political	Social
Average level	Human Development Index				
Deprivation	Multidimensional Poverty Index				
Vulnerability	Indicators of environmental sustainability, human security, well-being, decent work				
Inequality	Inequality-adjusted HDI				
	Gender Inequality Index				

Source: UNDP (2011)

This human development measure is important because it analyses different components of the society. With these indicators it is easier to reflect and understand the importance of tourism to these countries and the impact it may have in order to benefit these societies and give them better instruments to reach new development patterns.

The gender inequality rate shows us some considerable differences among these countries. However the most delicate situations are registered in São Tomé and Príncipe, since only about 47% of women participate in the labor force rate.

When we take a look into the poverty index, we can see that a significant percentage of the population of the entire sample has somehow to deal with some kind of

deprivation (from education to health or even living standards). Of course this situation means that one goal of these governments should be the eradication of this problem. As this is a persistent situation, we can conclude that others actions must be taken. In this context, tourism should be regarded as a credible alternative in order to try to solve, or at least to minimize this problem.

TABLE 10. SUSTAINABILITY AND VULNERABILITY

HDI RANK / COUNTRY	ECOLOGICAL FOOT-PRINT OF CONSUMPTION (HECTARES PER CAPITA)	SHARE OF TOTAL PRIMARY ENERGY SUPPLY		CARBON DIOXIDE EMISSIONS PER CAPITA (TONNES)	PROTECTED AREAS (% TERRITORIAL AREAS)	POPULATION WITHOUT ACCESS TO IMPROVED SERVICES		POPULATION AFFECTED BY NATURAL DISASTERS (AVERAGE PER YEAR, PER MILLION PEOPLE)
		FOSSIL FUELS (%)	RENEWABLE RESOURCES (%)			WATER (%)	SANITATION (%)	
		2007	2007	2006	2009	2008	2008	2000-2009
MEDIUM HUMAN DEVELOPMENT								
Cape Verde	..	..	..	0,2	2,5	16	46	11
São Tomé and Príncipe	..	..	..	0,6	0,7	11	74	..
LOW HUMAN DEVELOPMENT								
Angola	0,9	34	66	0,6	12,4	50	43	5,4
Guinea Bissau	1	..	..	0,2	1	39	79	79
Mozambique	..	5	95	0,1	2	53	83	83

Source: UNDP (2011)

An important aspect for daily well being, and of course for tourism development is related to (in)security. Although data is not very conclusive because some countries do not have adequate information, the homicide rate is not very high. However, an important issue is related to the perception of security. In Mozambique and Guinea-Bissau, we only achieve about 50% of perception. This is a huge challenge, mainly because of recent political developments in many of African countries and of course the terrorism.

TABLE 11. CIVIC AND COMMUNITY WELL-BEING

HDI RANK / COUNTRY	CRIME AND SAFETY		
	HOMICIDE RATE (PER 100,00 PEOPLE)	ASSAULT VICTIMS (% REPORTING HAVING BEEN A VICTIM)	PERCEPTION OF SAFETY (%)
	2003-2008	2006-2009	2006-2009
MEDIUM HUMAN DEVELOPMENT			
Cape Verde	11,4	..	..
São Tomé and Príncipe	..	..	..
LOW HUMAN DEVELOPMENT			
Angola	5	38	53
Guinea-Bissau	..	..	..
Mozambique	5,1	24	52

Source: UNDP (2011)

Although the bias between urban and rural should be carefully analyzed and adapted to the country dimension, the truth is that due to the dimension of each country, there should not be any true problems with the implementation of a tourism strategy in terms of spatial location. More concretely, these countries have enough "free space" in order to develop either rural or natural tourism. On the other hand, this is also important because it may minimize the rural-urban flows that have been happening in all these countries.

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TABLE 12. DEMOGRAPHIC TRENDS

HDI RANK / COUNTRY	URBAN (% OF TOTAL)	
	1990	2010
MEDIUM HUMAN DEVELOPMENT		
Cape Verde	44,1	51,1
São Tomé and Príncipe	43,7	62,2
LOW HUMAN DEVELOPMENT		
Angola	37,1	58,5
Guinea-Bissau	28,1	30
Mozambique	21,1	38,4

Source: UNDP (2011)

TABLE 13. DECENT WORK

HDI RANK / COUNTRY	EMPLOYMENT TO POPULATION RATE (% OF POPULATION AGES 15-64)	
	1991	2008
MEDIUM HUMAN DEVELOPMENT		
Cape Verde	56,7	55,7
São Tomé and Príncipe	..	..
LOW HUMAN DEVELOPMENT		
Angola	76,5	76,4
Guinea-Bissau	66,3	66,9
Mozambique	79,9	77,9

Source: UNDP (2011)

One major challenge to all these countries is related to the access to the labor market. When we take a look to the employed population with ages between 15-64 years, we can conclude that there is a lot to do to solve a huge problem. In many cases this situation means that many people have no other options than to join or

to go into the informal sector of the economy in order to find a job or get a salary, which is highly undesirable. One more time, if tourism is developed in a proper way, it may have the capacity of hiring several parts of the more vulnerable population: women, young people looking for their first job, unemployed and older people.

TABLE 14. FINANCIAL FLOWS AND COMMITMENTS

HDI RANK / COUNTRY	OFFICIAL DEVELOPMENT ASSISTANCE		REMITTANCE INFLOWS	
	TOTAL (% OF GNI)	PER CAPITA (US\$)	TOTAL (% OF GDP)	PER CAPITA (\$)
	2008	2008	2008	2008
MEDIUM HUMAN DEVELOPMENT				
Cape Verde	12,8	437,1	9,7	311
São Tomé and Príncipe	26,3	293,9	1,1	13
LOW HUMAN DEVELOPMENT				
Angola	0,5	20,5	0,1	5
Guinea-Bissau	31,2	83,3	7	19
Mozambique	22,9	91,5	1,2	5

Source: UNDP (2011)

The remittance flows as well as ODA flows play a very important role in almost all countries of this sample. The only exception is Angola, since it possesses natural richness such as diamonds and petrol among other natural potentialities that can be explored and therefore they can be a source of receipts. However, to the other countries, these flows may be critical to their survival. This means, that governments must find some alternatives to the potential diminution of these flows (that have been a tendency in the last years). Once again, one solution may be the development of a tourism strategy, because this can mean an alternative potential market of receipts.

TOURISM POTENTIAL

So, until now we have seen and reflect about the main challenges and vulnerabilities of these countries. Tourism has a different weight in each country. Therefore, now it is important to study the tourism potential for them as an alternative and credible strategy.

In terms of tourist flows, all these countries have been growing in a steady path. Even tough, one critical issue, not an easy one, is to maintain this tendency along the years or even better to raise their market share in the African tourism market. Among the PALOP countries we have to stress the significant Mozambique growth in tourism flows in these last years as well as Cape Verde. This country with limited dimension appears in third position almost with the same behavior as Angola. Although, as we can see in table 17, per capita receipts are not following this path because they dropped quite abruptly.

TABLE 15. INTERNATIONAL TOURISM ARRIVALS (THOUSANDS)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Angola	51	67	91	107	194	210	121	195	294	366
Cape Verde	115	134	126	150	157	198	242	267	285	287
Guinea Bissau	8	..	..	..	..	5	12	30	..	..
Mozambique	210	323	541	441	470	578	664	771	1815	2224
São Tomé and Príncipe	7	8	9	10	11	16	12	12	15	15

Source: UNWTO (various years)

Naturally, receipts have been growing as well. However, Mozambique only appears in third place which can be confirmed by the per capita receipts (Table 17).

TABLE 16. TOURISM RECEIPTS (MILLION US\$)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Angola	34	35	51	63	82	103	91	225	285	534
Cape Verde	64	77	100	135	153	177	280	303	350	355
Guinea Bissau	..	..	..	2,4	2,2	..	..	..	..	..
Mozambique	..	..	65	106	96	138	145	163	190	196
São Tomé and Príncipe	9,9	6,2	6,9	7,4	7,7	7,3	6,7	5	7,7	8,3

Source: UNWTO (various years)

As we can see, tourist per capita receipts are very uneven from country to country, meaning that something (or a lot can still be done) in order to maximize its potential.

TABLE 17. TOURISM RECEIPTS (US\$ TOURIST PER CAPITA)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Angola	667	522	560	589	423	490	752	1154	969	1459
Cape Verde	557	575	794	900	975	894	1157	1135	1228	1237
Guinea Bissau	0	..	..	..	..	0	0	0	..	..
Mozambique	..	0	120	240	204	239	218	211	105	88
São Tomé and Príncipe	..	775	767	740	700	456	558	417	513	553

Source: UNWTO (various years)



3. MAIN TOURISM CHALLENGES

At this moment it is important to systematize some of the main potentials and vulnerabilities of an adoption of a tourism strategy by these countries.

ECONOMY / SOCIETY

As we noted before, there are some factors that may adversely affect the needs/exigencies of tourism market and that should be taken into account by these countries. The main factors gravity around the following axes:

- Economical and social crisis in many countries world-wide.
- Demographic changes, mainly the aging of population. In 2000 people with more than 65 years represented 25% of active population (15-64 years). In 2050, it is expected to reach 50% (SAER, 2005). In this context, this market segment is becoming extremely important. Besides, nowadays, elderly is no longer synonymous of poverty as it used to be in the past. Another important characteristic is that the over 50's are expected to act in a younger way demanding more variety and change.
- Technological changes, mainly the use and importance of internet as well as low cost companies. Most of these countries face severe constraints with airport facilities.
- The number of holidays has been increasing in the last years. This increase is much greater for short trips (those that involves from one to three nights away)

than for long trips regardless the length of stay (Demunter, 2008).

- Long trips by airplane have been increasing. This is very important because access to air transport gives tourists the necessary opportunity of covering large distances rapidly and thus the opportunity of visiting other continents and other cultures (Demunter, 2008).
- DIY (do it yourself). Tourists are becoming responsible for the preparation and booking services (hotels, airplanes, etc.)
- Emergence of new centralities as it happens with the BRIC countries (Brazil, Russia, India and China). This means that tourism strategies must be orientated to capture these new tendencies.
- Tourism development in a sustainable way. This is a result of the will that tourists have to interact with local communities and therefore to create benefits to the local populations and areas. These countries must show the world they have adopted a sustainable strategy.

So, all the former aspects configure the emergence of the called mosaic society (SAER, 2005). Under this context, tourism can no longer be thought only from past tendencies. It is fundamental to adopt a prospective attitude that imposes us the obligation of looking into the past but knowing that there are some "degrees of freedom" that can always have a strong impact in the future. We are now living in a new period confronted with fragmentation and rupture in opposition to the old model where people were used to having order (family values, work for life, long term marriages, living in the same area for many years) and thus stability. Now, people are confronted with individualism, diversity, mobility and choice. This means that tourism will necessarily need to innovate in order to match this new society patterns.

Of course, it is extremely important to choose realistic tourism strategies so that tourism can become a structuring activity.

It is not enough to have the basic natural conditions to have a successful development. It is crucial that the economies of these countries have the capacity to suc-



cessfully answer to these challenges, or it will be impossible to create an adequate development model based in tourism.

It is important that society is able to adopt this strategy in order to maximise its potential in relation to several issues: employment, receipts, taxes, reorganization of companies, augmentation of internal market, augmentation of capacity export, among many others (Sarmiento, 2008).

But, behind all these issues, there is a need to create added value so that tourism can offer an integrated touristic product or to create a chain value that guarantees client satisfaction (expectations) and that maximizes its expansion potential.

Another important question is the creation of a strategic image of these countries, which can be achieved from two alternative ways: (i) capture tourism flows from nearby countries that have stronger tourism capacity; (ii) be able to rise the tourists permanence as well as its fidelity.

A complementary issue is related to the cross selling. This can be achieved through the offer of an integrated strategy as well as the development of a strategy that can capture more receipts.

As we know, today's consumers are much more experienced and this means that they will stress the necessity of getting an experience that is adequate to the "value for money".

This imposes the need to create an offer or/and a tourism product that is centred in the search of quality and diversity. If this is achieved, than these destinations are in position to get better brand loyalties as well as to develop its tourism capacity in a sustainable way.

Tourism must be developed in a sustainable way, which means that local populations must benefit from the development of this activity. People must be encouraged to actively participate in this activity providing essential and typical goods and handcraft, as well as getting jobs or at least an access to some kind of salary.

Complementary activities such as agriculture, fishing

and many others should be encouraged to improve their standards as a result to respond to tourism demands.

Local companies, mainly micro companies should be encouraged to develop their activities in order to support tourism development.

In order to raise the average length of stay, these countries should diversify their touristic products.

QUALITY AND SUSTAINABILITY

As a result of the increasing competition among destinations and the international crisis, many destinations started to point out the importance of quality as a strategic pillar (Rotler et al, 2002) that may help countries to reduce costs, avoid defects and errors and in the end will perform a better service and consequently benefit from this expansion activity. Quality is a personal concept and it must be view by the customer's eyes and not by our eyes. Therefore it is essential to guarantee that we know our customer's opinions, expectations as well as motivations.

Besides this, tourism must define its strategy based in sustainable models of production and consumption that are able to satisfy touts expectations and that consider environmental demands.

Quality and sustainability are two faces of the same coin and tourism has transformed them into a new challenge and a new paradigm both for clients as well as entrepreneurs.

More recently, tourism has been confronted with sustainable paradigm that defends the economic growth as a target but with control of its impact on natural resources, environment and culture (Meadows et al, 1972).

Anyway, this concept was born with Brundtland Report (CNUMAD, 1987) and since it there have been several works that have analyzed the relations between tourism and development.

So, at the bottom line, sustainable tourism can be seen has the search of satisfaction of economic, social and ascetics needs of present tourists and regions without



endanger the future integrity of the country in different levels, namely forest resources (Buchinger and Mozo, 1988; Gutiérrez et al, 1993), historic resources (Vera and Dávila, 1995), cultural resources (Carbajal et al, 2006; Moleta, 2000), local development (Balestreri, 1999; Vázquez, 1999; WTO, 1999) which needs an adequate planning (Boullón, 1997; McIntosh et al, 1999 and WTO, 1999).

In order to achieve new levels of customer loyalty, it is important to provide good services for tourists. To do this, people who live in tourist sites should be prepared and trained to develop a friendly spirit welcoming tourists with great goodwill, kindness and promptness so that the communication process is developed.

Tourism is an important tool in a society where there is some human development challenge and poverty issues has it happens with these countries. Otherwise we may have some reaction towards tourists. This means that all these countries should use tourism as a strategic tool to fight poverty and to achieve new economic levels of development.

Although there is a correlation between receipts and GDP, the major goal should be the task of reflecting potential tourism gains into the economy in a sustainable way.

ENVIRONMENT

It is vital not only to preserve and keep (maintain) the countries natural sights such as tropical forests, extraordinary rock formations, rivers, lakes, waterfalls, national parks, mountains, caves, beaches, etc., but to improve them in a sustainable way.

Terrestrial infrastructures should be rebuilt in order to facilitate the tourism flows to other areas besides the most touristic ones.

Environment should be preserved at all costs. All these countries face in many ways environmental vulnerabilities that must be preserved.

Since environment is a crucial issue in these countries, water and energy consume must be carefully taken in order to achieve better sustainable standards.

Due to the climate conditions, one major goal should be the seasonality reduction.

Eco-tourism should be encouraged due to the enormous awareness of environmental issues amongst these countries.

SECURITY AND SAFETY

Despite the growth of tourist arrivals, the incidence of crime against visitors is still very low, especially if we compare these countries with others from the same region. This is a positive impact to tourism industry.

It is important to assure that the threats of security and stability from terrorist-type actions by members of the separatist movement are not present. This means that governments will need to find solutions to this threat if its initiatives and efforts to develop tourism are not to be in vain.

In face of African and Middle East instability, it is important to assure the political stability and take advantage of these adverse conditions.

Although many countries suffer from corruption, Angola is still rated as one of Africa's most corrupt countries and as such it has often struggled to attract inward investment for tourism infrastructure projects, with major companies being reluctant to operate in such an unpredictable environment. This situation may be serious for the many potential incoming tourists with the fear that they may be confronted with corrupt officials, who they may not be comfortable dealing with.

These countries possess natural and cultural resources in abundance. However, civil unrest and perceived personal danger may prevent them to reach their tourism potential.

HEALTH

It is of huge importance to guarantee both health care and hotel (destination) hygiene within these countries and resorts.

But health issues are also affecting one of Africa's tourism assets mainly in Mozambique and Angola: the lion. Due to the outbreak of bovine tuberculosis in Kruger



National Park spreading from the buffalo is now claiming the lives of many of the park's lions and in some extent it may also be a threat to the rare white rhino.

BARRIERS TO INTERNATIONAL TRAVEL

It is very important that entry formalities are simplified and currency control is liberalized in order to encourage more tourists to come.

So, embassies and consulates of these countries need to facilitate the emission of visas for tourists.

EDUCATION

It is vital that the professionals in the touristic area act in an innovative and professional way. Therefore, high standard formation is required not only in the tourism activity but as well as in society as a whole. However, tourism should not be viewed as a final end of unemployment.

People should understand and be prepared since early years of school to the importance of tourism activity and the behavior that they should have in their daily activities.

MARKETING

The creation and investment in a promotion strategy in order to show to the world the various natural and beautiful resources that each country possesses must be the first step of a marketing strategy. It is not enough to participate in international fairs but to create a real digital marketing for the countries.

It is important to take advantage of low cost companies by inducing them to come to these countries. This situation could be beneficial for a severe reduction in tourism prices and could increase the competitive status of these countries.

It is also important to stress the low cost attractions associated to high quality patterns.

Traditional markets (diaspora and the traditional ones) should be preserved and properly fidelised.

However, it is vital that other markets should be encouraged to come to these countries. However, the strategy

to capture these potential flows must be adequate to the local potential of each country. This means that each country should carefully reflect about their resources and adapt them to the motivations and expectations of the tourists.

With the progressive aging of world population, these countries should capture them and provide a unique experience. This is a way of avoiding seasonality problems. Tourists that come from more mature markets are expecting intense experiences. So, it is important that niche products are well developed and prepared.

The global strategy requires that competitive advantages are improved and adapted to the consumer behavior. The offer strategy should also develop new products and experiences. All these countries should reorganize their weak aspects and reinforce the strong ones.

Africa's promotional strategy should diversify their traditional markets segments and encourage new markets to the interest of a genuine market oriented and focused in a specific low intensity tourism strategy. This promotion strategy should also be concerned with the attraction of higher spending tourists.

There is still little use of electronic marketing technology amongst these nations, although they have been developing some Internet web sites to promote their products and countries.

LOCALISATION

As a result of globalization and the consequent homogenization of destinations and cultures, there has been increasing conflict in developing countries between identity and modernity.

Tourism can often be used as a way to achieve new development levels but collective, collaborative and cooperative approaches between the tourism sector and local society are necessary to avoid potential civil conflicts.

BASIC INDICATORS PROBLEMS

In the organization of this paper we were confronted with several problems that can seriously reduce the



final measurement objectives of the tourism impact and that can also affect the governmental information. The main problems were the (i) lack of available information; (ii) inexistence of long term series even for the most recent years; (iii) different methodologies for the same kind of studies (iv) lack of adequate sources for the information given by national sites.

So, in the actual context, it is vital that we can be able to quantify and measure the progresses and the true impact of tourism. This can only be achieved by the construction of some adequate indicators that should be (i) clear; (ii) rigorous; (iii) credible; (iv) applicable, (v) comparable and (vi) representative (WTO, 2005).

CONCLUSION

So, after the previous discussion we can conclude that these countries still have a huge potential of tourism development. In most cases we can even say that tourism is in the early years of birth.

However, if we reflect about the PALOP economical, environmental and even society challenges it is important to stress that tourism must be carefully developed. In other words, it is important to avoid the temptation of concentrate in this activity all the economical resources. Tourist potentialities will only be achieved in case all other economical sectors have the capacity of given resources that will help the modernization of the economy and the development of the society in an fair way.

Of course, it is also essential that tourist infrastructures are properly planned in order to attract not only more tourists but better tourists. These investments in infrastructures must go further than the usual and necessary accommodation and travel facilities. It must involve civil society. We must not forget that all these countries face some weaknesses that should be carefully attended by local Governments mainly due to their: (i) limited aerial, terrestrial and even maritime capacity transport; (ii) deficient airport infrastructures; (iii) bureaucracy; (iv) fiscal policies and (v) lack of educational preparation.

Thus, Governments must define a global strategy and that allows the implementation of various initiatives that encourage both national and international tourism. Some examples could be presented, namely cooperative agreements with other countries, the opening of new flight routes to other African countries as well as other countries and the development of closer ties with some key countries in order to facilitate the large diasporas that emigrated to several countries to return for family or cultural visits.

If these measures are achieved, than we can expect to have a successful strategy. Otherwise, we will fall into Dachary's "model of tourism evolution" that can be described in a sarcastic way as the road that goes from the 4S (Sun, Sea, Sand, Sex) to the 3E (Excitement, Education, Entertainment) and finally to the 3T (Tsunamis, Terrorism and Heart quakes) (Dachary, 2005).



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