REPUBLIC OF GHANA

Trends in the TOURISM MARKET in Ghana

– 2005 - 2014 –

GHANA STATISTICAL SERVICE
DECEMBER 2017

PREFACE

This second edition of the report on Tourism Market Trends in Ghana is one of the Ghana Statistical Service's series of reports on domestic and international tourism. The first edition was published in November 2006 covering the period 1995 to 2004. The aim of this publication is to present the trends in domestic and international tourism in Ghana, from 2005 to 2014.

The data presented were provided to the Ghana Statistical Service by the country's tourism institutions, notably the Ghana Tourism Authority, Ghana Museums and Monuments Board, Ghana Civil Aviation Authority, Ghana Heritage Conservation Research Centre, Ghana Immigration Service, Wildlife Division of the Forestry Commission, and the Ministry of Tourism, Culture and Creative Arts.

The information contained in this report gives an overview of the tourism industry in Ghana and is intended to provide adequate information for actors in the industry for planning. The report details trends in international tourist arrivals and receipts, international and domestic air travel, the number of visitor arrivals and real revenue accruing to selected tourist sites, alongside detailed information on the accommodation sector, and trends for other tourism supply establishments such as tour and car rental companies.

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DEFINITIONS

The definitions below are from the following: Europe in Figures (Eurostat 2008a); Europe in Figures (Eurostat 2012); and Panorama on Tourism (Eurostat 2008) unless otherwise stated.

- **Accommodation establishment**: local kind-of-activity unit, which provides accommodation.
- **Accommodation supply**: is the provision of hotels and similar establishments, rooms, beds and any other facilities needed for visitors' comfort.
- **Average annual growth rate**: the year–on-year growth rate of a phenomenon over a specified period.
- **Average hotel size:** average accommodation capacity of the hotels in a country in terms of the average number of bed places per hotel.
- **Average length of stay**: this is obtained by dividing the number of nights by the number of arrivals.
- **Domestic tourism**: is the tourism of resident visitors within the economic territory of the country of residence.
- **Eco-tourism**: is responsible travel to natural areas that conserve the environment and improve the wellbeing of the local people, and involves interpretation and education (International Eco-tourism Society, 2016)
- **Enterprise:** an enterprise is defined as the smallest combination of legal units that constitute an organizational unit producing goods or services.
- **Growth rate**: growth rates are the rates of total change over a specified reference period from values at the beginning of the period or at a specified earlier time.
- **Length of stay**: for domestic and overnight trips are defined as nights spent in one specific place.
- **Long haul travel**: refers to arrivals of residents of any country of a particular region to any country or any region other than their own.
- **Market share**: measures the relative size of an entity as a proportion of the total value of all entities.
- **Nominal revenue:** revenue not adjusted for the effects of inflation or deflation.
- **Number of bed-places:** the term "bed-place" means a single bed; a double bed is counted as two bed places. It is determined by the number of persons who can stay

overnight in the beds provided in the establishment (dwelling). The unit serves to measure the capacity of any type of accommodation.

- **Number of bedrooms**: the unit formed by one room or groups of rooms constituting an indivisible rental whole in an accommodation establishment or dwelling.
- **Purpose of visit:** is the purpose in the absence of which the trip would not have been made (UNWTO 2008).
- **Real revenue:** revenue adjusted for inflation, enabling comparison of quantities as if prices had not changed.
- **Real visitor revenue**: is the real revenue an investor expects to receive from a tourist attraction after allowing for inflation.
- **Room occupancy rate:** refers to the level of demand for the accommodation available in the country.
- **Tourism**: refers to the 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.
- **Tourist accommodation**: refers to any facility that regularly or occasionally provides accommodation for tourists or visitors.
- **Tourist receipts**: expenditure by international inbound tourists.
- **Tourist**: a visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (UNWTO 2008).
- **Visitor**: a visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. (UNWTO 2008).

SYMBOLS AND ABBREVIATIONS

-	nil or no figures
…	not available
GH¢	Ghana Cedis
US$	US Dollars
GCCA	Ghana Civil Aviation Authority
GMMB	Ghana /museums and Monuments Board
GHCT	Ghana Heritage Conservation Trust
GSS	Ghana Statistical Service
GTA	Ghana Tourism Authority
GIS	Ghana Immigration Service
MoTCCA	Ministry of Tourism, Culture and Creative Arts
UNWTO	United Nations World Tourism Organization

TECHNICAL NOTES

Calculation of Average Annual Growth Rates

Growth rates are calculated as annual averages and represented as percentages. The annual growth rate for a series of T annual observations, say Y_1, Y_2, Y_3, … , Y_T, is defined as:

R= $(Y_t - Y_{t-1})/Y_{t-1}*100$, where Y_t is the observation for year t.

The growth rate between two points in time for certain indicators, notably tourist arrivals, real revenue, etc. is calculated from the equation:

$$R = \frac{1}{n-1} \ln\left(\frac{Y_t}{Y_1}\right) * 100,$$

Where Y_t and Y_1 are the last and first observations in the period, *n* is the number of years in the period, and ln is the natural logarithm operator. This growth rate is based on a model of continuous exponential growth between two points in time. It does not take into account the intermediate values of the series. Nor does it correspond to the annual rate of change measured at a one-year interval, which is given by $(Y_t - Y_{t-1})/Y_{t-1}$.

This is the standard method of calculating annual average growth rates used by the UN World Tourism Organization (UNWTO, 2016).

Calculation of Market Share

Market share is used here as a general term to denote the proportion of the total attributable to one category.

Market shares are presented as percentages. Market share is calculated as follows:

Market share = k / T *100, where k is a fraction of items and T is the total number of items.

EXECUTIVE SUMMARY

Background

This report utilizes data from Ghana's tourism industry to analyze the market trends in the country during the period 2005 to 2014. It is the second in a series; the first report was published in 2006 and covered the period 1995-2004. This successor report aims to communicate to a wide audience what has been the trends in the tourism market in order to inform strategic decision-making for the public, private, and not-for-profit sectors. The data have been used to produce statistics on areas including international tourist arrivals and receipts, international air passenger and aircraft movements, visitor arrival numbers and revenue accruing to tourist sites, accommodation capacity, travel agencies, restaurants, tour operators and car rental establishments.

The tourism market has shown strong growth across Africa in recent years. The UN World Tourism Organization's 2016 Tourism Highlights report found that the African continent welcomed 55.3 million international tourists in 2014 and that Sub-Saharan Africa accounted for 34.9 million of the visitors. The total for the African continent had risen from 20.2 million in 1995 to 36.7 million in 2005 (UNWTO 2006). In 2015, Africa had 5% share of the World's international tourist arrivals and 3% of the total tourism receipts (UNWTO 2016).

Tourism has the potential to play an important role in economic development and employment growth. A 2013 World Bank report on tourism in Africa estimated that 3.8 million jobs could be created in sub-Saharan Africa in a decade connected to tourism and further help to stimulate demand for better infrastructure, local products, accommodation etc. (World Bank 2013). The same report named Ghana among the group of Sub-Saharan African countries with the highest tourism performance in the region (World Bank 2013).

The last trend analysis on the tourism market in Ghana produced in 2006, found that circa 584,000 international tourists visited the country in 2004 and that generated US$694m in international tourist receipts (GSS 2006).

Main findings

The period 2005 to 2014 has been one of substantial change in the size and make-up of Ghana's tourism market. The numbers of international tourists has increased substantially accompanied by an increase in the amount of money spent, which reached US$2.06bn in 2014.While at the beginning of the period the single category contributing the largest amount of tourists was overseas Ghanaians coming to the country for leisure and recreation or to visit relatives, by 2014, the single country of origin accounting for the highest proportion of visitors was the USA. The most popular reason for visiting Ghana was for business and professional purposes.

The majority of the international tourists arrived by air and the number of international air passenger and aircraft movements approximately doubled during this period. Domestic tourism also saw growth, with domestic air travel available for the first time in 2007. While domestic aircraft movements have grown steadily, the number of domestic air passengers displayed a sharp upturn in 2011 until a slight downturn in 2013-2014.

Major tourist sites and community-based eco-tourism sites are unevenly distributed around the country with the majority of the former found in Greater Accra, Central and Ashanti regions, while the latter are concentrated in Volta and Brong Ahafo regions. Arrivals to both major tourist sites and eco-tourist sites increased over the period. Real revenue however, has remained stagnant for major tourist sites while eco-tourist sites have overall, seen a drop in real revenue. Both categories saw an overall drop in average amount spent per visitor over the period.

With increased tourism has come increased supply of accommodation and the number of establishments, bedrooms, and bed-places have risen. Most notable is the growth in the budget accommodation sector which dominates the tourism market in the country, and the concentration of accommodation units in Greater Accra, the region providing the largest proportion of accommodation across all 10 years.

Other sectors of the tourism market have also experienced change with a decline in the number of travel and tour agencies and travel agencies and a rise in the number of tour operators, particularly car rental companies. Grade 2 restaurants also showed substantial gains while the number of Grade 1 and Grade 3 restaurants fell. The number of nightclubs, however, remained relatively flat.

International Tourist Arrivals and Receipts, 2005 – 2014

The analysis indicates a shifting landscape over the ten-year period characterized by substantial rise in visitor numbers and the amount of money they spent, a shift in the country of origin for the majority of visitors, and a rise in the number of visitors entering the country for business rather than recreation.

International tourist arrivals grew substantially from 392,500 to 1,093,000 while receipts also rose from US$627.1m to US$2.06bn over the period. For both arrivals and receipts, growth was stronger in the first half of the period than the second.

While early in the period, Ghanaians resident abroad accounted for the largest market share of visitors, by 2014, the USA was the single country contributing the most international arrivals to the country. The number of visitors coming from "other" countries together contributed the most visitors from 2011 onwards. Within the West Africa sub-region, Nigeria was the single country contributing the most visitors by 2014.

Early in the period there was also a shift in the most popular purpose of visit from leisure and recreation to business and professional tourism which accounted for 44% of the market by 2014.

Across the decade, accommodation was the category on which visitors spent the most money but this category dropped in share of expenditure from 32% to 28% between 2005 and 2014, largely due to the rise in expenditure on "other" items, which jumped from 8% to 18% of total expenditure from 2005 to 2014.

International and Domestic Air Passenger and Aircraft Movements, 2005 – 2014

International and domestic air travel has also seen substantial change across the years. While the size of the international passenger and aircraft market approximately doubled over the period, the domestic market was beginning to build up. From 2007 to 2011, domestic passenger movement did experience growth; however, from 2011 onwards there were substantial increases in the number of domestic passengers. The growth of domestic aircraft movement has also been positive though more incremental across the years than passenger number growth.

International air passenger movements saw growth over the period, with arrivals growing by 112.5% while departures grew by 94.5%; both arrivals and departures showed stronger growth in the first half of the period. International aircraft movement similarly, showed stronger growth in the first half of the period, and overall growth of 99.7%.

Data for domestic air passenger movement in Ghana is only available from 2007 onwards. For both domestic passenger arrivals and departures, there was a sharp upturn in numbers from 2011 onwards with arrivals reaching 360,000 and departures, 359,000 by 2014. Growth in domestic passenger numbers was stronger in the first half of the period than the second. Total domestic aircraft movement grew substantially by 269% between 2007 and 2014. Despite experiencing a year-on-year dip from 2013 to 2014, growth in domestic aircraft movement was stronger in the second half of the period.

Tourist sites

Overall, major and eco-tourist sites saw growth in visitor numbers over the ten years, with both categories showing positive growth in the first half of the period but dropping in the second. For both categories, real revenue showed a general downward trend.

Visitor Arrivals and Real Revenue Accruing to selected Major Tourist Sites, 2005 – 2014

Visitor arrivals to selected major tourist sites rose from 381,600 to 592,300 over the decade. Real revenue also rose marginally from GH¢490,000 to GH¢492,000 over the same period with average spend per arrival falling from 1.3 GH¢ to 0.8 GH¢. Both arrivals and real revenue grew positively in the first half of the period, at an annual average growth rate of 10.7% and 6.1% respectively, while during the second half, both categories fell every year on average by -1% and -3.3% respectively.

By 2014, Kakum Conservation Area was the major tourist site with most visitors (159,815) and the Central and Ashanti regions accounted for the largest share of visitors to these sites in the country.

Visitor Arrivals and Real Revenue Accruing to selected Community-based Eco-tourism Sites, 2005 – 2014

Visitor arrivals to selected community-based eco-tourism sites rose from 63,500 in 2005 to 79,200 in 2014. Overall, real revenue however, after peaking in 2012, dropped over the decade from GH¢150,700 to GH¢124,500. Similar to the trend for major tourist sites, the average spend per visitor dropped from GH¢2.40 in 2005 to GH¢1.60 in 2014. While arrivals grew in the first half of the period by 8.2% on average per year, real revenue dropped by 6.5% per year on average over the period. Both arrivals and real revenue decreased in the second half of the period by 10% and 5% respectively.

In 2014, Kintampo Waterfalls accounted for the greatest share of visitors to the community-based eco-tourism sites recording 25,000 visitors. On a regional basis, Volta and Brong Ahafo attracted the largest share of visitors to community-based eco-tourism sites in the same year.

Accommodation Capacity in Ghana, 2005 – 2014

Overall, the trend in accommodation capacity in Ghana from 2005 to 2014 was generally, upward. However, while the number of establishments has risen, particularly in the budget end of the market, occupancy rates in the upper end of the market dropped over the period.

The number of accommodation establishments grew by 91.1% at an annual average growth rate of 7.2%, while the number of bedrooms and bed-places grew by 120.4% and 90.2% respectively, with annual average growth rates of 8.8% and 7.1% respectively. The number of rooms and bed-places declined only in 2007 but increased in every other year.

Greater Accra region accounted for most of the accommodation in the country throughout the period and by 2014 accounted for 36% of accommodation establishments in the country. Ashanti region accounted for the second largest share of accommodation in the country in each year.

From 2005-2014, the accommodation market has been dominated by budget accommodation nationwide; this category saw an increase of 115.5% over the period and also witnessed its share of the market grow from 63% to 70%.

While there has been relatively steady growth for number of establishments, for bedrooms and bed-places however, the average size of accommodation establishments remained relatively flat (between 18 and 20 rooms per establishment from 2005 to 2014). Moreover, the occupancy rate for five (5), four (4), three (3) and two (2) star hotels dropped over the period indicating an oversupply at this end of the market. Occupancy rates for one (1) star, budget, guesthouse and other accommodation were not available.

Other Tourism Supply Establishments, 2005–2014

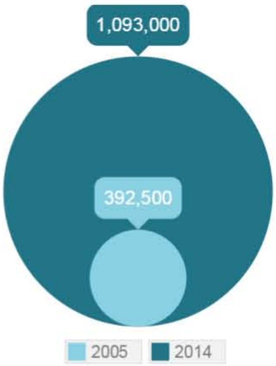
Between 2005 and 2014, the number of travel and tour agencies, and travel agencies decreased with negative annual average growth rates in the first half of the period but small positive growth in the second half of the period. Conversely the number of tour operators increased marginally with positive growth in both halves of the decade. Of all four (4) categories, car rentals showed the strongest growth, particularly in the early part of the decade. All categories registered a year on year dip in 2014 over the 2013 figures.

The number of restaurants also increased over the period overall, although negative growth rates were recorded in the first half of the period, while positive growth was recorded in the second. Of all three (3) grades of restaurant, only grade 2 increased in number from 2005 to 2014; grades 1 and 3 saw falls in their number over the period. In 2014, grade 2 restaurants accounted for the largest share of restaurants in the country, reaching 206 out of a total of 433.

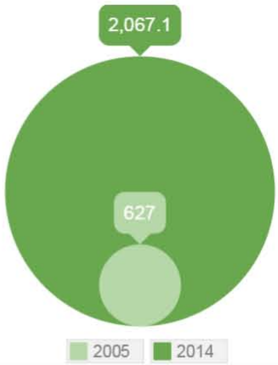
While nightclubs also experienced some positive growth from 2005 to 2014, their number remained relatively flat, gaining only 9 in the entire period.

Tourism Market Trends in Ghana, 2005-2014

International Tourism

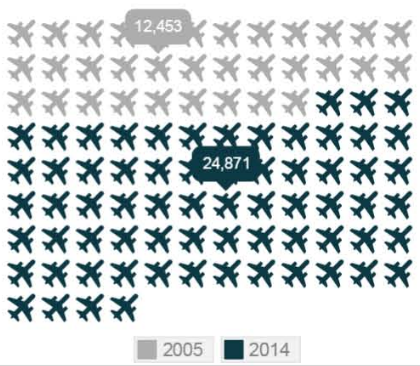


Growth in International Arrivals

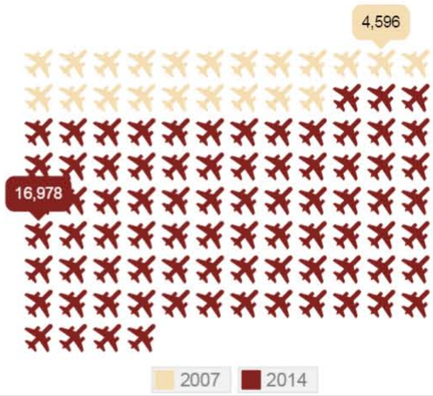


Growth in International Tourist Receipts, (in USD$m)

Air Movements

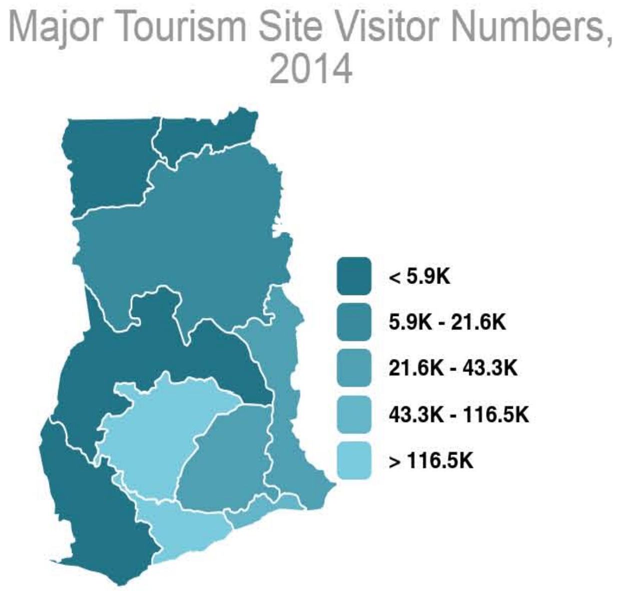


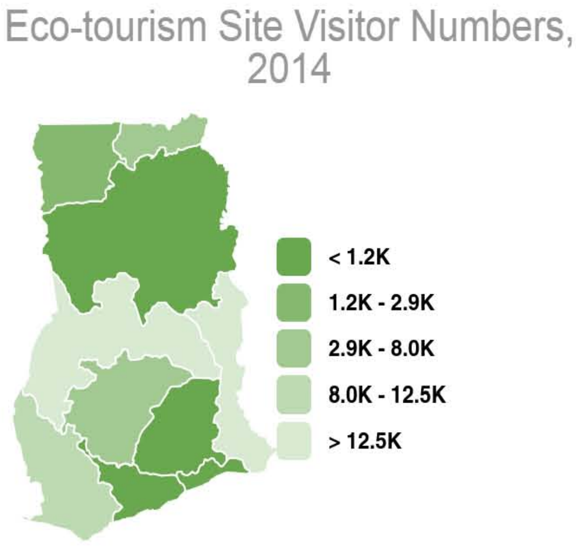
Total International Aircraft Movements



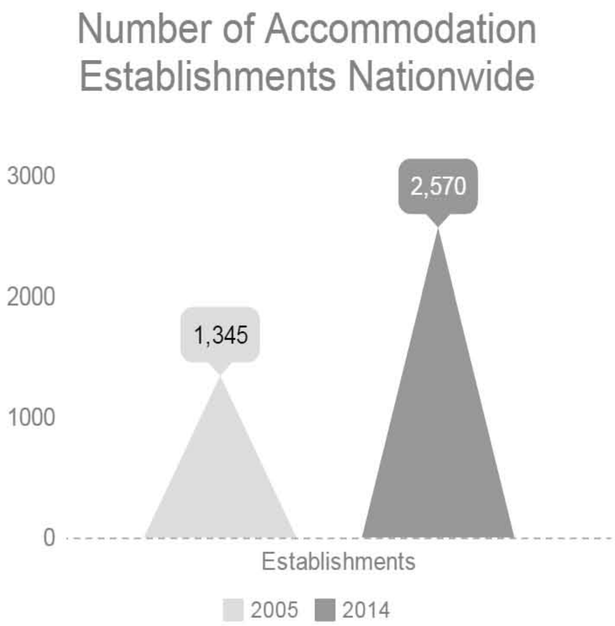
Total Domestic Aircraft Movements

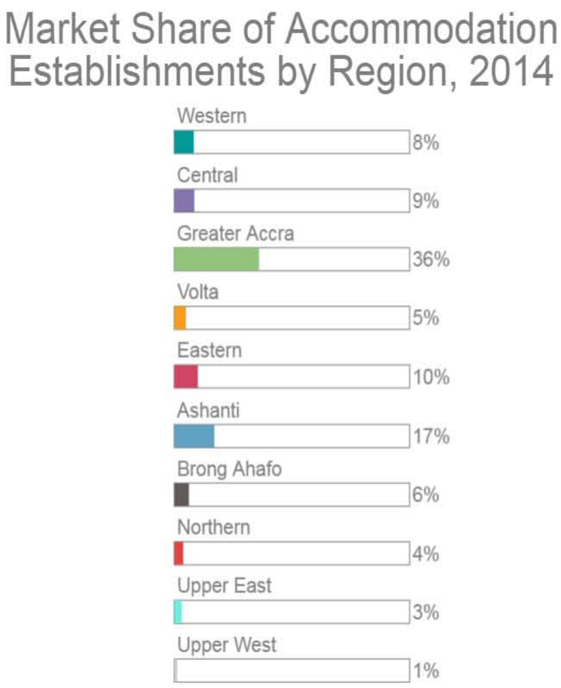
Tourism Site Visits



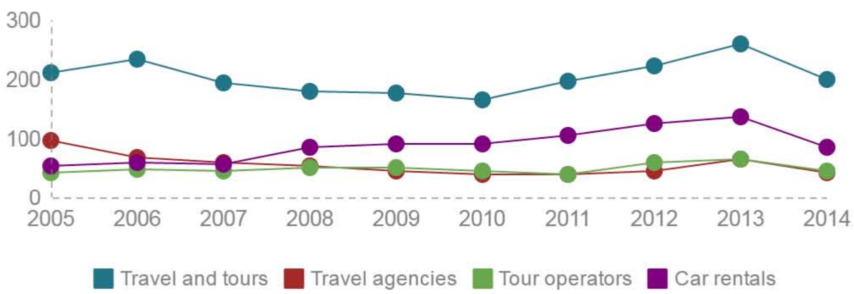


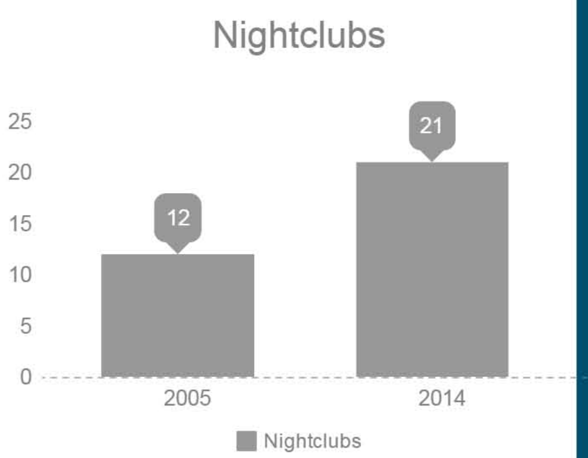
Accommodation





Other Tourism Establishments





1 INTRODUCTION

1.1 Background

The tourism market has shown strong growth across Africa in recent years. The UN World Tourism Organization's 2016 Tourism Highlights report established that the African continent welcomed 55.3 million international tourists in 2014 and that Sub-Saharan Africa accounted for 34.9 million of them. The total number of visitors to the African continent has risen from 20.2 million in 1995 to 36.7 million in 2005 (UNWTO 2006). In 2015, Africa had 5% share of the World's International Tourist arrivals and 3% of the total tourism receipts (UNWTO 2016).

Tourism has the potential of playing an important role in economic development and employment growth. A 2013 World Bank report on tourism in Africa estimated that 3.8 million jobs could be created in sub-Saharan Africa (SSA) in a decade connected to tourism and further help to stimulate demand for better infrastructure, local products, and accommodation. It could also support often isolated communities who rely on tourism as a source of income. The report also found that a vibrant tourism market has been a driver for economic growth and poverty alleviation in the countries studied (World Bank 2013).

The same report named Ghana among the group of Sub-Saharan African countries with the highest tourism performance in SSA (World Bank 2013). As a key foreign exchange earner and with the potential for job creation and stimulation of economic activity, the quest for the development of tourism in Ghana is in line with the country's development objectives.

The last trend analysis on the tourism market in Ghana produced in 2006, found out that in 2004 the country had circa 584,000 international tourists who together generated US$694 million in international tourist receipts (GSS 2006).

1.2 Objectives

This report has been designed to provide a condensed and quick-reference guide to the major tourism actors in the country. It is intended to support decision-making, which requires reliable information to guide adequate policies and development strategies. The report is further intended to aid effective planning for the industry and in turn drive the industry's contribution to the nation's economy. This is in line with the policies outlined in the Ghana Shared Growth and Development Agenda (GSGDA), the national economic dialogue, and the Sustainable Development Goals (SDGs) which are aimed at ensuring the holistic development of all social, economic, and environmental aspects of the country.

Tourism is a cross-cutting industry where services for tourists or visitors involve a variety of economic actors including hotels and similar establishments, restaurants and cafes, transport operators, travel agencies and tour operators, cultural and recreational facilities, etc. This report therefore, attempts to capture trends for each of these actors, as outlined in the following section.

1.3 The Structure of the Report

The report has been organized into seven chapters.

1. Chapter one comprises the introduction, which includes the background, objectives, structure of the report, and data sources.
2. Chapter two presents analysis of international tourist arrivals and the corresponding tourist receipts. Findings are further disaggregated by purpose of visit and category of expenditure. The average length of stay across the 10 years is also provided.
3. Chapter three reports on international and domestic air passenger and aircraft movements.
4. Chapter four offers analysis on visitor arrivals and revenue accruing to some selected major tourist sites and community-based eco-tourism sites.
5. Chapter five discusses trends in tourism accommodation capacity in Ghana.
6. Chapter six presents movements in the number of travel agencies, tour operators, restaurants and car rental establishments in the country.
7. Finally, chapter seven contains a summary and discussion on policy implications.

1.4 Data Sources and limitations

This report has been prepared using data primarily from the Ghana Tourism Authority (GTA). Data were also collected from the Ghana Museums and Monuments Board (GMMB), Wildlife Division of the Forestry Commission, Ghana Civil Aviation Authority (GCAA), Ghana Heritage Conservation Trust (GHCT), Nature Conservation Research Centre (NCRC) and Ghana Immigration Service (GIS). In addition, the Ghana Statistical Service collected data from some selected major tourist sites and community-based eco-tourism sites throughout the country.

Good quality data is vital for producing useful statistical reports. The data provided for this report was on the whole good but suffered from quality issues such as missing data (which have been replaced with averages, where possible), conflicting estimates from different sources (where this occurred, the estimate most in keeping with the overall trend was chosen), and inconsistent use of terminology/categorizations. It is hoped that these data quality issues would be addressed for future iterations of this report.

In addition, data on some aspects of the tourism market were not available, such as occupancy rates for the budget end of the accommodation market. This makes it difficult to provide a full picture of market trends but could be improved upon during further rounds of data collection.

2. INTERNATIONAL TOURIST ARRIVALS AND RECEIPTS

2.1 Introduction

This chapter provides an analysis of trends of international tourist arrivals and receipts, tourist expenditure, purpose of visit and length of stay. International tourists are Ghanaian and non-Ghanaian visitors living outside Ghana who spent at least one night in collective or private accommodation in Ghana.

International tourist receipts are receipts or income earned by a country from inbound tourism resulting from expenditure on accommodation, food and drinks, local transport, entertainment, formal and informal shopping, etc.

The analysis of the data indicates a shifting landscape over the ten year period. International tourist arrivals grew substantially from 392,500 in 2005 to 1,093,000 in 2014 while receipts also rose from US$627.1 million to US$2.06 billion over the period. For both arrivals and receipts, growth was stronger in the first half of the period than the second. While in the early half of the period, Ghanaians resident abroad accounted for the largest market share of visitors, by 2014, the USA was the single country contributing the most international arrivals. The number of visitors coming from "other countries" together contributed the most visitors from 2011 onwards. Early in the period there was also a shift in the purpose of visit from leisure and recreation to business and professional tourism. Across the decade, accommodation was the category on which visitors spent the most money.

2.2 International Tourist Arrivals and Receipts

A total of 7.38 million international tourists arrived in Ghana during the ten-year period from 2005 to 2014 (Table 2.1). International tourist arrivals increased considerably, by 178.5% from 392,500 in 2005 to 1,093,000 in 2014 (Table 2.1 & Figure 2.1).

The trend in growth in international tourist arrivals during the ten-year period 2005–2014, showed an annual average growth rate of 13.3% in the first half of the period, and an average annual increase of 9.5% during the second half of the decade. Overall, for the ten-year period, international tourist arrivals increased at an average annual rate of 11.4% (Table 2.2). The highest percentage change from the previous year of 29.5% was recorded in 2006 while the lowest (-0.6%) was recorded in 2009 (Table 2.1).

Figure 2.1: International tourist arrivals, 2005 & 2014

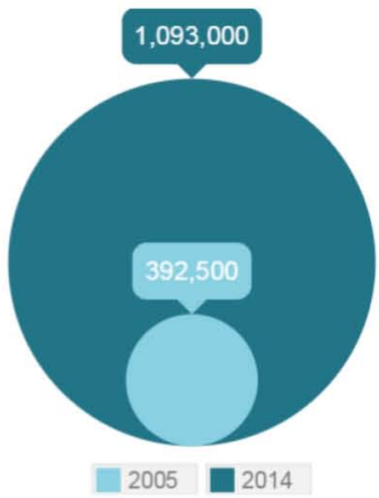
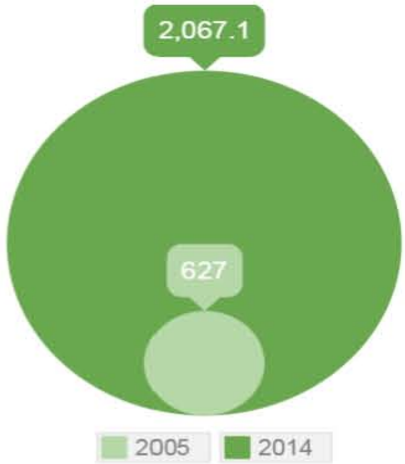


Table 2.1: International tourist arrivals and receipts, 2005-2014

Tourist arrivals and receipts	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals ('000)	392.5	508.2	580.9	672.4	668.3	746.5	827.5	903.3	994	1,093
% annual change		29.5	14.3	15.8	-0.6	11.7	10.9	9.2	10.0	10.0
Receipts (million US$)	627	740.7	879	1052.1	1211.2	1400	1634	1,704.7	1,877	2,067.1
% annual change		18.0	18.8	19.7	15.1	16.1	16.2	4.3	10.1	10.1
Receipts/Arrival ('00 US$)	16.0	14.6	15.1	15.6	18.2	18.8	19.7	18.9	18.9	18.9

Source: National Tourism Development Plan, 2013 (for 2005-2011 figures); Ghana Tourism Authority, (for 2012-2015 figures)

Figure 2.2: International tourist receipts in million USD$, 2005 and 2014



International tourist receipts (excluding international transport) increased from US$627 million in 2005 to US$2.067 billion in 2014 (Table 2.1 & Figure 2.2). The average expenditure per international tourist arrival increased steadily from 2005 to 2014. In 2005, the average spend per international tourist arrival was US$1,600 which increased to US$1,890 in 2014, registering an 18.1% increase. The lowest annual percentage change (4.3%) of international tourist receipts was recorded in 2012, and the highest annual percentage change (19.7%) was recorded in 2011 (Table 2.1).

Receipts rose at an average annual growth rate of 13.3%, over the ten-year period (Table 2.2). The international tourist receipts for the first half of the decade increased at an average annual rate of 16.5% while in the second half of the decade tourist receipts recorded an average annual growth rate of 9.7% (Table 2.2).

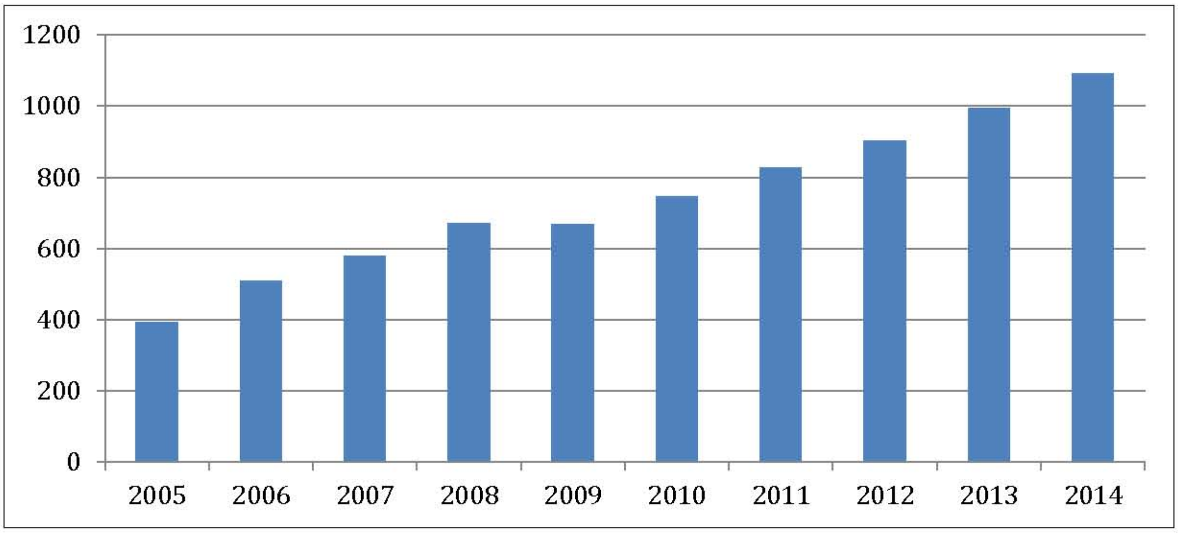
Table 2.2: Trends of international tourist arrivals and receipts, 2005-2014

Category	Increase between 2005 and 2014	Average Annual Growth Rate (%) 2005 – 2009	2010 – 2014	2005 – 2014
Tourist Arrivals (thousand)	700.5	13.3	9.5	11.4
Tourist Receipts (million US $)	1440.3	16.5	9.7	13.3

Source: Ghana Tourism Authority/Ghana Statistical Service

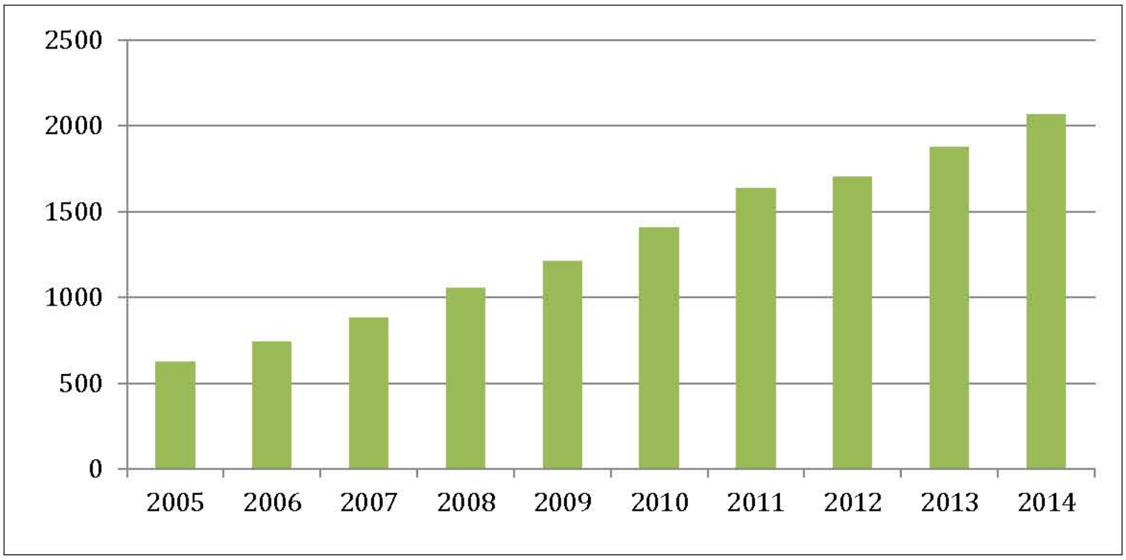
The overall trend over the 10-year period shows rising international arrival numbers and international tourism receipts. However, both were rising at a faster rate in the first half of the decade than the second.

Figure 2.3: International tourist arrivals by year, 2005-2014



The highest international tourist arrivals was recorded in 2014 and the lowest in 2005 (Figure 2.3). Similarly, the highest level of international tourism receipts was recorded in 2014 while the lowest was in 2005 (Figure 2.4).

Figure 2.4: International tourism receipts by year, 2005-2014



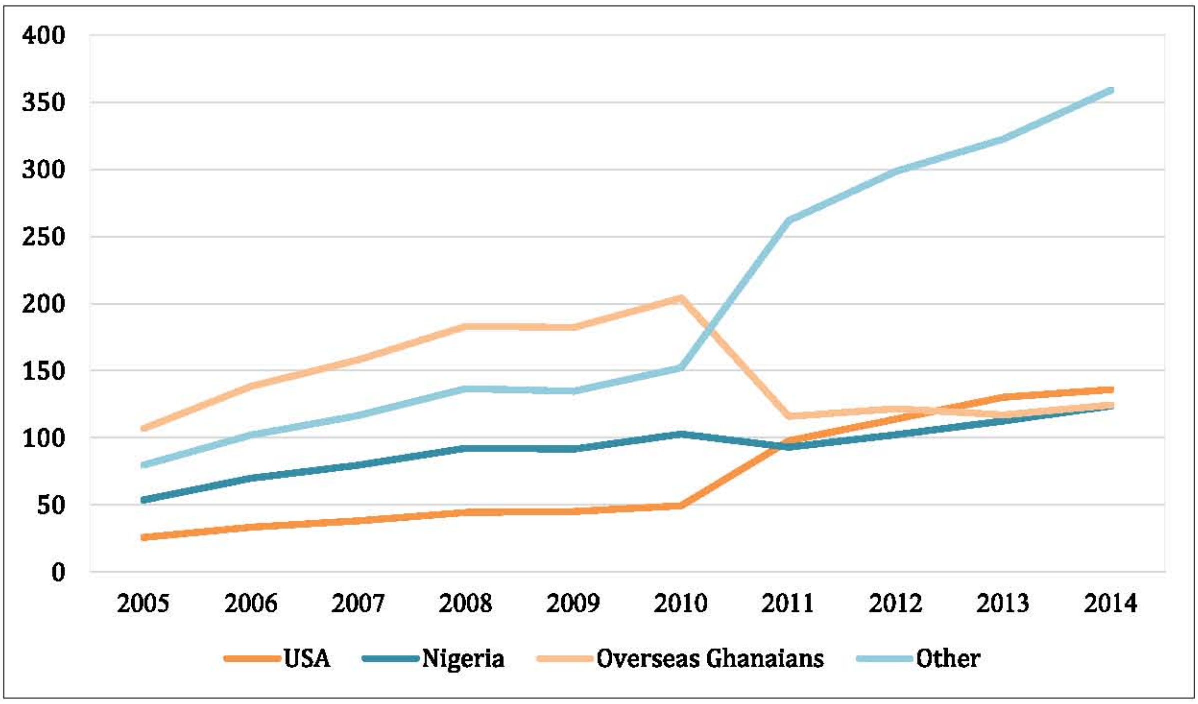
2.3 Trends of International Tourist Arrivals by Nationality

In 2005, Ghanaians resident abroad accounted for the largest share of international visitors to Ghana. By 2014, the USA had become the single country accounting for most international visitors followed by Nigeria (Table 2.3 & Figure 2.5). Visitors from "Other" countries however, accounted for more than twice the number coming from the USA by 2014 (Table 2.3

& Figure 2.5). The heading "Other" represents countries whose individual percentage share of international arrivals is low.

During the decade, the profile of visitors changed substantially from predominantly overseas resident Ghanaians to a more diverse mix of visitors from neighbouring countries (Nigeria) and from the USA, while the number of people coming from "Other countries" recorded a 350.4% increase (Table 2.3). Ghanaians resident abroad remained an important part of the visitor arrivals, accounting for approximately the same number of visitors from Nigeria in 2014 (Figure 2.5).

Figure 2.5: Trends in international tourist arrivals by selected nationalities, 2005-2014



In 2005, international tourist arrivals from the USA numbered 25,900, rising to 135,900 in 2014, an increase of 424.7%, at an average annual growth rate of 18.4% (Tables 2.3 & 2.4). The share of the tourist market accounted for by the USA increased from 6.6% in 2005 to 12.4% in 2014 (Table 2.4 & Figures 2.6 & 2.7).

Ghanaians resident abroad formed the highest international tourist arrivals from 2005 until 2011 when visitors from "Other "countries took the top spot (Figure 2.5).The share of the market attributable to overseas Ghanaians, reduced from 27.2% in 2005 to 11.4% in 2014 (Table 2.4 & Figures 2.6 & 2.7). From 2005 to 2009, Ghanaians resident abroad arriving in Ghana grew at an average annual rate of 13.4%, but from 2010 to 2014, arrivals decreased at an average annual rate of 12.3% (Table 2.4).This reversal in trend from 2010 led to an overall average growth rate of 1.7% for arrivals of overseas Ghanaians from 2005 to 2014 (Table 2.4).

Visitor numbers from Nigeria increased by 129.9% between 2005 and 2014, at an average annual growth rate of 9.3% (Tables 2.3 & 2.4). From 2005–2009, tourist arrivals from Nigeria recorded an average annual growth rate of 13.3% while from 2010-2014 the rate of increase slowed down to an average annual rate of 4.6%. Nigeria's share of total arrivals reduced from 13.7% in 2005 to 11.3% in 2014 (Table 2.4 & Figures 2.6 & 2.7)

Table 2.3: International tourist arrivals in Ghana by nationality& year, 2005-2014

	Number of international arrivals (in thousands)									
Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
USA	25.9	33.5	38.3	44.3	45.0	49.4	97.8	114.1	130.3	135.9
UK	34.0	44.1	51.5	58.3	57.8	64.8	71.2	66.9	85.4	91.0
Germany	19.0	24.6	28.1	32.5	32.2	33.6	27.3	31.1	36.9	41.3
France	14.2	18.5	21.0	24.2	24.1	27.1	19.6	21.6	21.9	23.8
Netherlands	9.5	12.4	14.0	16.2	16.2	18.1	26.5	26.7	31.0	33.8
Canada	5.3	6.9	7.8	9.1	8.9	10.0	17.4	20.2	27.6	29.4
Switzerland	3.7	4.8	5.6	6.4	6.3	7.1	4.6	3.8	4.9	5.5
Scandinavia	5.3	6.8	7.8	8.9	8.9	10.0	13.5	15.8	19.8	23.2
Italy	4.7	6.2	7.0	8.2	8.2	9.1	7.7	8.4	10.0	11.7
Cote d'lvoire	18.9	24.5	27.9	32.3	32.1	36.1	48.4	47.1	44.5	55.6
Nigeria	53.8	69.8	79.7	92.3	91.6	102.8	92.9	102.3	112.5	123.7
Togo	11.8	15.2	17.3	20.1	20.0	22.5	23.0	25.3	29.1	34.4
Overseas Ghanaians	106.8	138.3	158.2	183.1	182.2	204.0	115.8	121.7	117.2	124.6
Other	79.7	102.1	116.6	136.6	134.8	152.1	261.7	298.4	322.5	359.0
Total	392.5	508.2	580.9	672.4	668.3	746.5	827.5	903.3	993.6	1093.0

Source: National Tourism Development Plan, 2013 (for 2005-2011 figures); Ghana Tourism Authority, (for 2012-2015 figures)

In 2014, Cote d'Ivoire remained the second most important country in the West African sub-region from which Ghana received international tourists after Nigeria. In 2005, its share of tourist arrivals was 4.8% but this increased to 5.1% in 2014, an increase of 0.3% (Table 2.4 & Figures 2.6 & 2.7). Tourist arrivals from Cote D'Ivoire increased at an average annual rate of 12% from 2005 to 2014 (Table 2.4)

The United Kingdom had the fifth largest share of the arrivals market in Ghana in 2014 (Table 2.4 & Figure 2.7). Its share in arrivals was 8.7% in 2005, but decreased to 8.3% in 2014 (Table 2.4 & Figures 2.6 & 2.7). In terms of growth, visitor arrivals from the U.K. registered an average annual growth rate of 13.3% between 2005 and 2009; between 2010 and 2014, it recorded an 8.5% increase while between 2005 and 2014, the annual average growth rate was 10.9% (Table 2.4).

Table 2.4: Trends of international tourist arrivals in Ghana by nationality, 2005-2014

Origin	Annual Change (%)				Market Share (%)				Average Annual Growth Rate (%)		
	2005-2006	2007-2008	2010-2011	2013-2014	2005	2008	2011	2014	2005-2009	2010-2014	2005-2014
USA	29.3	15.7	98.0	4.3	6.6	6.6	11.8	12.4	13.8	25.3	18.4
UK	29.7	13.2	9.9	6.6	8.7	8.7	8.6	8.3	13.3	8.5	10.9
Germany	29.5	15.7	-18.8	11.9	4.8	4.8	3.3	3.8	13.2	5.2	8.6
France	30.3	15.2	-27.7	8.7	3.6	3.6	2.4	2.2	13.2	-3.2	5.7
Netherlands	30.5	15.7	46.4	9.0	2.4	2.4	3.2	3.1	13.3	15.6	14.1
Canada	30.2	16.7	74.0	6.5	1.4	1.4	2.1	2.7	13.0	27.0	19.0
Switzerland	29.7	14.3	-35.2	12.2	0.9	1.0	0.6	0.5	13.3	-6.4	4.4
Scandinavia	28.3	14.1	35.0	17.2	1.4	1.3	1.6	2.1	13.0	21.0	16.4
Italy	31.9	17.1	-15.4	17.0	1.2	1.2	0.9	1.1	13.9	6.3	10.1
Cote D'lvoire	29.6	15.8	34.1	24.9	4.8	4.8	5.8	5.1	13.2	10.8	12.0
Nigeria	29.7	15.8	-9.6	10.0	13.7	13.7	11.2	11.3	13.3	4.6	9.3
Togo	28.8	16.2	2.2	18.2	3.0	3.0	2.8	3.1	13.2	10.6	11.9
Overseas Ghanaians	29.5	15.7	-43.2	6.3	27.2	27.2	14.0	11.4	13.4	-12.3	1.7
Other	28.1	17.2	72.1	11.3	20.3	20.3	31.6	32.8	13.1	21.5	16.7
Total	**29.3**	**15.8**	**10.9**	**10.0**	**100.0**	**100.0**	**100.0**	**100.0**	**13.3**	**9.5**	**11.4**

Source: National Tourism Development Plan, 2013 (for 2005-2011 figures); Ghana Tourism Authority, (for 2012-2015 figures)

Figures 2.6 and 2.7 indicate that the most notable changes were the growth in market share for the "Other" countries category which grew from 20.3% to 32.8% over the 10-year period at an annual average growth rate of 16.7%, and growth for the USA (13.0%) while market share for Ghanaians Overseas declined to 11.0%.

Figure 2.6: Market share of major countries of origin of international tourists, 2005

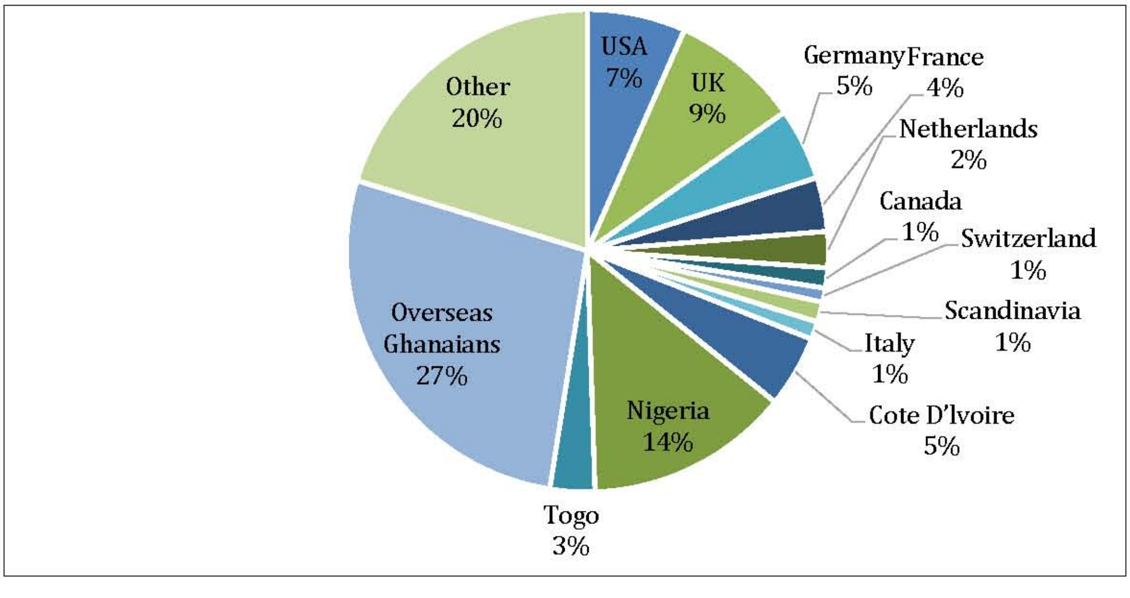
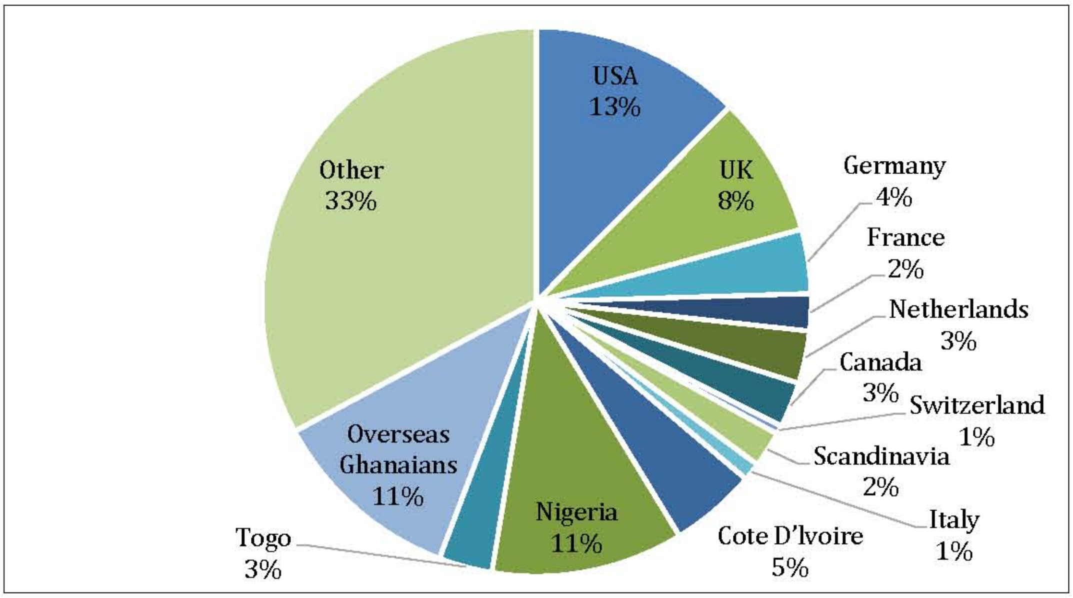


Figure 2.7: Market share of major countries of origin of international tourists, 2014



2.4 International Tourist Arrivals by Purpose of Visit

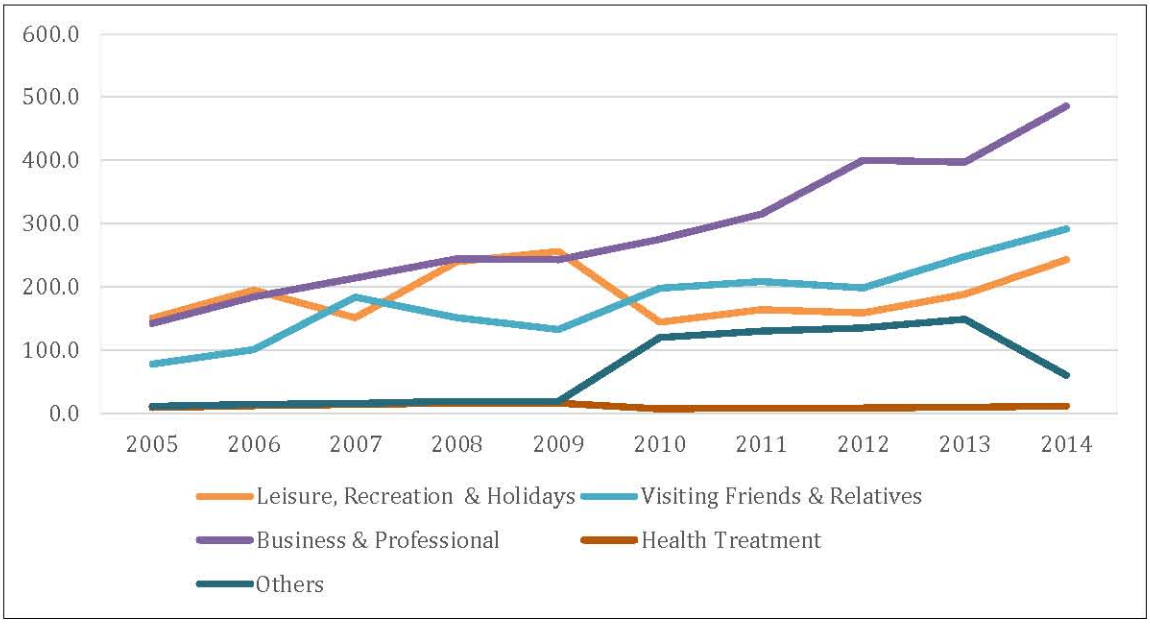
Table 2.5 presents the trends of international tourist arrivals by purpose of visit from 2005 to 2014. In 2005 and 2006 leisure, recreation and holidays was the main purpose for visiting (Table 2.5 & Figure 2.8). From 2007 onwards however, the single category that accounted for most visits was for business and professional purposes except for 2009 when the main reason was for leisure, recreation and holidays. In 2014, visiting friends and relatives was the second important reason for visiting the country followed by leisure, recreation, and holidays. The number of visitors for health treatment was relatively low and saw little movement over the 10-year period (Table 2.5 & Figure 2.8). The number of visitors for "Other" reasons was also relatively low until 2010, when it experienced a huge rise to 120.4%, leveling off from 2011 to 2013, before dropping in 2014.

Table 2.5: International tourist arrivals by purpose of visit, 2005-2014

	Arrivals (000's)									
Purpose of Visit	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Leisure, Recreation & Holidays	150.6	195.2	151.7	240.0	256.4	144.6	164.1	159.4	188.7	243.0
Visiting Friends & Relatives	78.1	101.1	184.2	151.4	132.8	198.3	208.7	198.8	248.4	291.5
Business & Professional	142.5	184.4	214.1	244.6	243.1	275.7	315.6	400.5	397.5	485.8
Health Treatment	9.8	12.7	14.6	16.8	16.7	7.5	9.0	9.1	10.0	12.1
Others	11.4	14.7	16.4	19.5	19.3	120.4	130.6	135.5	149.0	60.7
Total	392.5	508.2	580.9	672.4	668.3	746.5	828.0	903.3	993.6	1093.0

Source: National Tourism Development Plan, 2013 (for 2005-2011 figures); Ghana Tourism Authority, (for 2012-2015 figures)

Figure 2.8: International Tourist Arrivals by Purpose of Visit, 2005-2014



Business and professional tourism registered an average annual growth rate of 13.3% from 2005 to 2009, while from 2010-2014 the average annual growth rate was 14.2% (Table 2.6). With regard to market share, the number of visitors for business & professional purpose rose from 36% in 2005 to 44.4% in 2014; visits to friends and relatives also rose from 19.9% to 26.7% over the same period while visitors for leisure, recreation and holidays dropped from 38.4% to 22.2% (Table 2.6; Figure 2.9; Figure 2.10). By 2014, health treatment accounted for just 1% of international arrivals while 6% was for "Other" reasons.

Table 2.6: Trends of international tourist arrivals by purpose of visit, 2005-2014

Purpose of Visit	Growth rate				Market share (%)				Average annual growth rate (%)		
	2005-2006	2007-2008	2010-2011	2013-2014	2005	2008	2011	2014	2005-2009	2010-2014	2005-2014
Leisure, Recreation & Holidays	29.6	58.2	13.5	28.7	38.4	35.7	19.8	22.2	13.3	13.0	5.3
Visiting Friends & Relatives	15.3	-21.6	7.2	17.4	19.9	22.5	25.2	26.7	13.3	9.6	14.6
Business & Professional	27.8	20.1	27.6	22.2	36.3	36.4	38.1	44.4	13.3	14.2	13.6
Health Treatment	1.9	1.5	1.0	21.5	2.5	2.5	1.1	1.1	13.2	12.0	2.3
Others	2.2	2.1	7.1	-59.3	2.9	2.9	15.8	5.6	13.2	-17.1	18.6
Total	29.5	15.8	10.9	10.0	100.0	100.0	100.0	100.0	13.3	9.5	11.4

2.5 Average length of stay of international tourists in Ghana

Table 2.7 reports on the average length of stay of tourists in Ghana. International tourists who visited Ghana between 2005 and 2014 spent on average, ten (10) days during their trips. The average length of stay of tourists increased from 9.5 days in 2005 to 10.5 days in 2014. The highest average length of stay was recorded in the year 2009 (10.6 days) while the lowest (9.5 days) was recorded in 2005 (Table 2.7).

Table 2.7: Average length of stay of tourists in Ghana, 2005-2014

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Average Length of Stay	9.5	9.9	10.0	10.1	10.6	10.0	10.0	10.0	10.5	10.5

Source: Ghana Tourism Authority

Figure 2.10: Market Share by Purpose of Visit, 2005

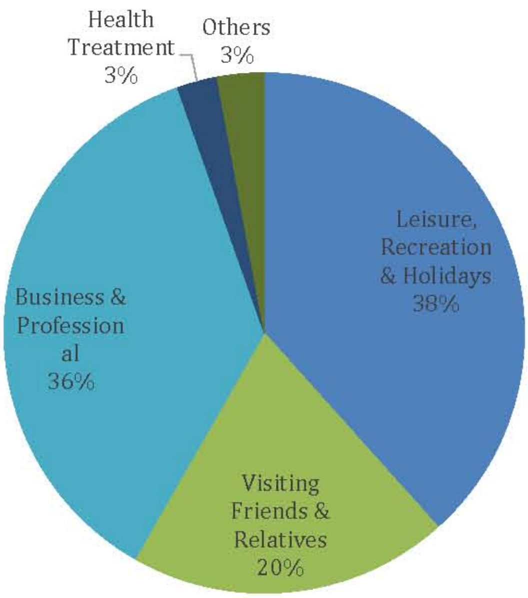
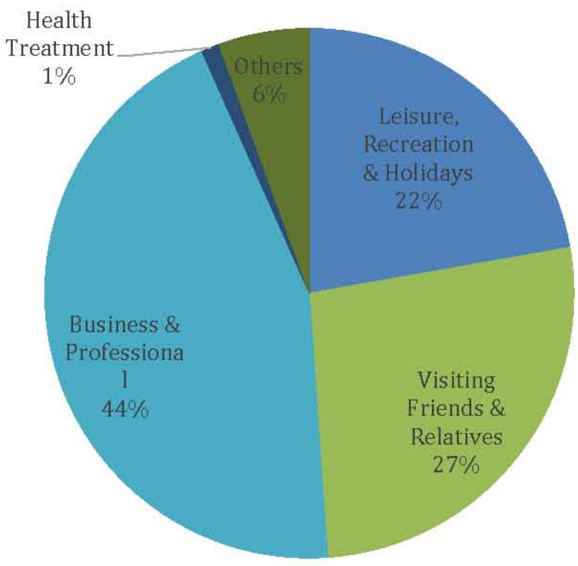


Figure 2.9: Market Share by Purpose of Visit, 2014



2.6 Trends in International Tourist Expenditure

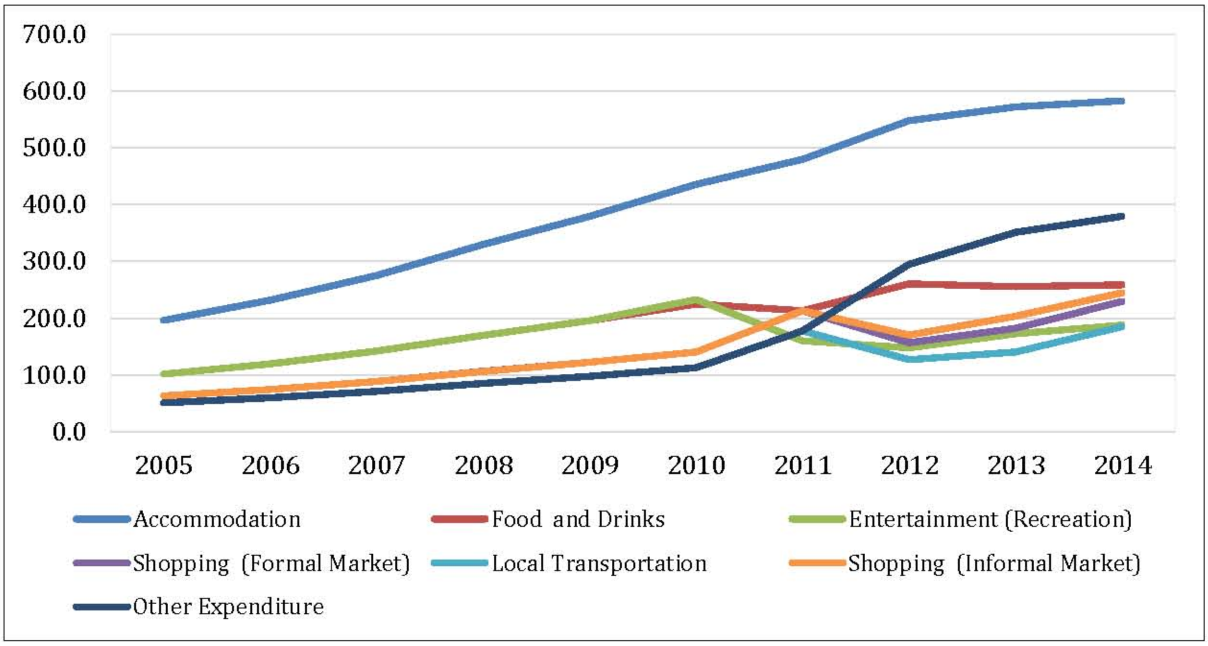
Table 2.8 presents international tourist expenditure by category from 2005 to 2014. Expenditure on accommodation took the greatest share of total expenditure in each year followed by food and drinks or entertainment while in 2014, "Other expenditure" items accounted for the second largest share followed by food and drinks, and then shopping (informal) (Table 2.8 & Figure 2.11).

Table 2.8: Tourist expenditure by category, 2005-2014

Category	Tourist expenditure (million US dollars)									
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Accommodation	196.4	231.9	275.2	329.5	379.2	435.8	479.5	547.7	572.1	582.6
Food and Drinks	101.4	119.7	142.1	169.9	195.8	225.0	213.1	260.3	255.4	258.8
Entertainment (Recreation)	101.4	119.7	142.1	169.9	195.8	233.0	160.0	147.5	172.3	187.5
Shopping (Formal Market)	63.3	74.8	88.8	106.3	122.4	140.5	213.1	156.7	182.3	229.4
Local Transportation	50.6	59.9	71.0	85.1	97.8	112.6	177.6	127.1	140.1	185.0
Shopping (Informal Market)	63.3	74.8	88.8	106.3	122.4	140.5	213.1	170.5	203.7	244.5
Other Expenditure	50.6	59.9	71.0	85.1	97.8	112.6	177.6	294.9	351.1	379.3
Total Expenditure	627.0	740.7	879.0	1,052.1	1,211.2	1,400	1,634	1,704.7	1,877	2,067.1

Source: Ghana Tourism Authority

Figure 2.11: Tourist Expenditure by Category, 2005-2014



Expenditure on food and drinks increased from US$101.4 million in 2005 to US$258.8 million in 2014, an increase of 155.2%, at an average annual growth rate of 10.4% (Tables 2.8 & 2.9).

Within the first half of the period (2005-2009), expenditure on accommodation increased at an average annual rate of 16.5% while from 2010 to 2014, it recorded an average annual growth rate of 7.3% (Table 2.9).

"Other expenditure" rose from US$50.6 million in 2005 to US$379.3 million in 2014 (Table 2.8), recording a 649.6% increase. The average annual growth rate for "Other expenditure" showed a reverse trend compared to the other categories, rising at a slower rate in the first half of the decade (16.5%) than in the second (30.4%) (Table 2.9).

Table 2.9: Trends of tourist expenditure by category, 2005-2014

Category	Growth Rate (%)				Market Share (%)				Average Annual Growth Rate (%)		
	2005-2006	2007-2008	2010-2011	2013-2014	2005	2008	2011	2014	2005-2009	2010-2014	2005-2014
Accommodation	18.1	19.7	10.0	1.8	31.3	32.1	30.5	28.2	16.5	7.3	12.1
Food and Drinks	18.0	19.6	-5.3	1.3	16.2	15.3	13.6	12.5	16.4	3.5	10.4
Entertainment (Recreation)	18.1	19.6	-31.3	8.8	16.2	8.7	9.2	9.1	16.5	-5.4	6.8
Shopping (Formal Market)	18.1	19.7	51.7	25.9	10.1	9.2	9.7	11.1	16.5	12.3	14.3
Local Transportation	18.3	19.9	57.8	32.0	8.1	7.5	7.5	9.0	16.5	12.4	14.4
Shopping (Informal Market)	18.1	19.7	51.7	20.0	10.1	10.0	10.9	11.8	16.5	13.9	15.0
Other Expenditure	18.4	19.9	57.7	8.1	8.1	17.3	18.7	18.3	16.5	30.4	22.4
Total Expenditure	18.2	19.7	16.7	10.1	100.0	100.0	100.0	100.0	16.5	9.7	13.3

Source: Ghana Tourism Authority/ National Tourism Development Plan, 2013

Figures 2.12 & 2.13 show that the share of expenditure on accommodation fell from 32% in 2005 to 28% in 2014. Similarly, expenditure on food and drinks accounted for 16% in 2005 falling to 13% in 2014 while expenditure on entertainment also declined. Items that recorded an increase in their share of expenditure from 2005 to 2014 were shopping in both the formal and informal market, which were up 1% and 2% respectively. Local transportation also gained a 1% increase in 2014 over its 2005 share while "Other expenditure" also saw the largest increase than any category, rising from 8% to 18% share of total expenditure (Figure 2.12 & 2.13).

Figure 2.12: Market share of expenditure by category, 2005

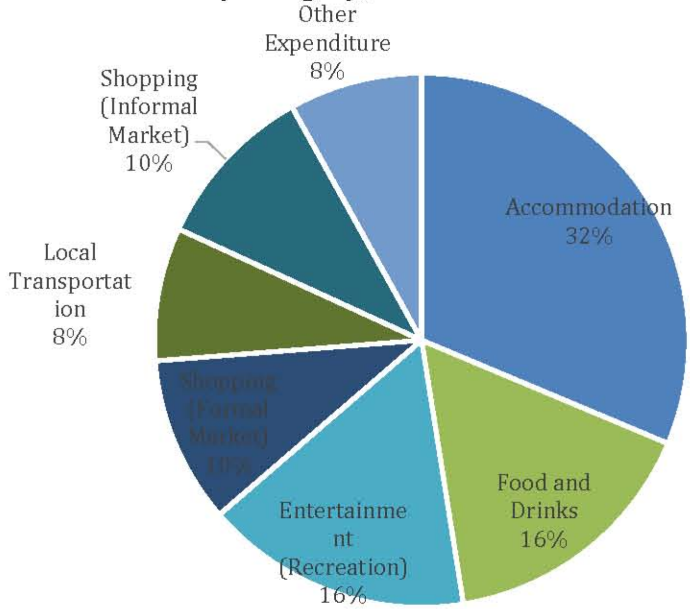
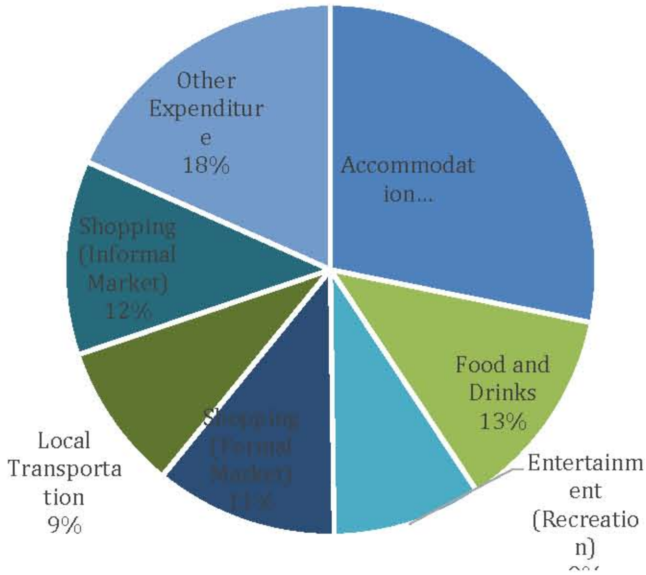


Figure 2.13: Market share of expenditure by category, 2014



3. INTERNATIONAL AND DOMESTIC AIR PASSENGER AND AIRCRAFT MOVEMENTS

3.1 Introduction

International air passenger movement refers to the arrival and departure of passengers by air while international aircraft movement refers to the arrival and departure of aircraft between Ghana and other countries of the world. Domestic air passenger and aircraft movements refer to the movement of passengers and aircraft within Ghana's airspace. For both international and domestic air passenger and aircraft movements, the data represent movements to and from Kotoka International Airport only.

International air passenger movements experienced significant growth over the period 2005-2014, with arrivals growing by 112.5% while departures grew by 94.5%. Both arrivals and departures showed stronger growth in the first half of the period than the second. International aircraft movement similarly showed stronger growth in the first half of the period, and overall growth was 99.7%.

Data for domestic air passenger movement in Ghana is only available from 2007 onwards. For both domestic arrivals and departures, there was a sharp upturn in numbers from 2011 onwards with arrivals and departures reaching 360,000 and 359,000 respectively in 2014. Growth in domestic passenger numbers was stronger in the first half of the period than the second. Total domestic aircraft movement grew substantially by 269% from 2007 to 2014. Despite experiencing a year-on-year dip from 2013 to 2014, growth in domestic aircraft movement was stronger in the second half of the period.

3.2 International Air Passenger Movements

Out of the 7.38 million international tourists that visited Ghana between 2005 and 2014, (Table 2.1) 6.48 million arrived by air (Table 3.1). Trends in international air passenger movements from 2005 to 2014 are presented in Tables 3.1 and 3.2. For the ten-year period, both international passenger arrivals and departures showed a steady growth, except in 2012 when arrivals recorded a year-on-year dip of 0.4% and in 2014 when arrivals dropped by 2.5% (Table 3.1). Air passenger arrivals into the country more than doubled from 382,200 in 2005 to 812,200 in 2014, an increase of 112.5%, and at an average annual rate of 8.4% (Tables 3.1 & 3.2 & Figure 3.1).

Figure 3.1: International air passenger arrivals, 2005 & 2014 ('000s)

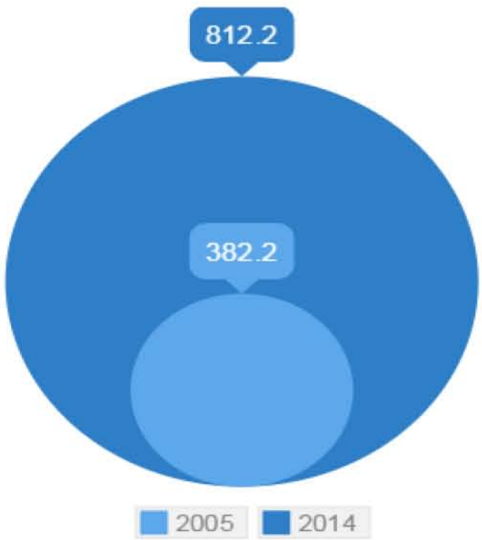


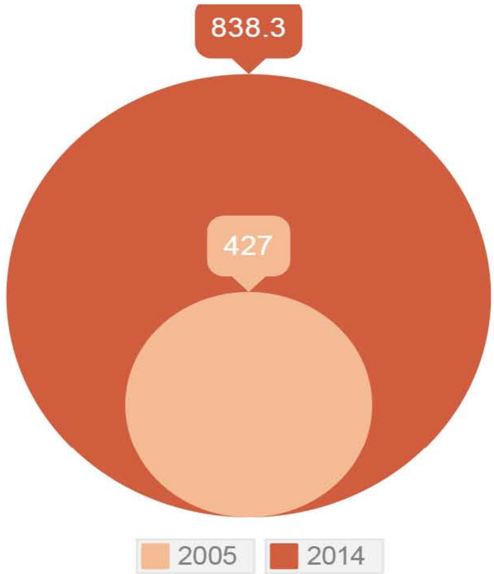
Table 3.1: International air passenger arrivals, departures, and total movements 2005-2014

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals (‘000s)	382.2	458.9	524.6	587.7	601.6	694.9	795.4	792.4	832.7	812.2
% annual change		20.1	14.3	12.0	2.4	15.5	14.5	-0.4	5.1	-2.5
Departures (‘000s)	427	467.7	541.4	598.8	603.2	692.8	790.2	933.7	836.9	838.3
% annual change		9.5	15.8	10.6	0.7	14.9	14.1	18.2	-10.4	0.2
Total Movements (000’s)	809.2	926.6	1,066	1,186.6	1,205	1388	1585.6	1,726.1	1,670	1,650.5
% annual change		14.5	15.0	11.3	1.6	15.2	14.2	8.9	-3.3	-1.2

Source: Ghana Civil Aviation Authority

Departures recorded during the period almost doubled, from 427,000 in 2005 to 838,300 in 2014, an increase of 94.5%, at an average annual growth rate of 7.5% (Tables 3.1 & 3.2 & Figure 3.2). Departures witnessed positive growth in every year except 2013, when it dipped by 10.4% (Table 3.1).

Figure 3.2: International air passenger departures, 2005 & 2014



Total movements had more than doubled by 2014 compared to the 2005 figure, registering an average annual growth rate of 7.9% (Tables 3.1 & 3.2).

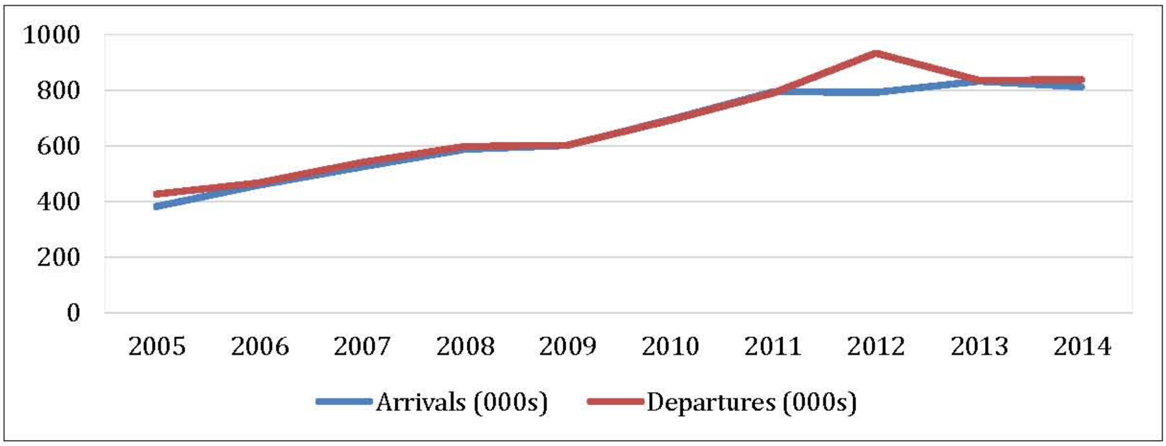
While overall, there was growth in both arrivals and departures over the decade, the growth in arrivals, departures and total movements was substantially stronger in the first half of the decade than in the second. Arrivals for example, rose at an annual rate of 11.3% in 2005-2009 but it was only 3.9% from 2010-2014. Similarly, the number of departures rose by 8.5% on average per annum in the first half of the period, before slowing to an average annual growth rate of 4.8% in the latter half.

Table 3.2: Trends in international air passenger movements, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
Year	2005 & 2014	2005-2009	2010-2014	2005-2014
Passenger Arrivals (‘000)	430	11.3	3.9	8.4
Passenger Departures (‘000)	411.3	8.6	4.8	7.5
Total Movements (‘000)	841.3	10.0	4.3	7.9

Figure 3.3 shows that in 2012, while arrivals dipped slightly to792,000 passengers, departures peaked at 933,000.

Figure 3.3: International air passenger departures and arrivals, 2005-2014



3.3 International Scheduled Aircraft Movements

Tables 3.3 and 3.4 report on trends in international aircraft movements from 2005 to 2014. Total aircraft movement (aircraft arrivals and departures) was 12,473 in 2005 but increased to 24,871 in 2014, an increase of 99.7% (Table 3.3).

Aircraft arrivals into the country increased substantially from 6,249 in 2005 to 12,451 in 2014 (Table 3.3 & Figure 3.4). However, 2009 and 2012 recorded declines in the number of aircraft arrivals, dropping by 0.9% in both years. During the ten-year period, aircraft arrivals into the country registered an average annual growth rate of 7.7% (Table 3.4). For the first half of the decade, arrivals recorded an average annual growth rate of 8.1%, while for the second half of the period the average annual growth rate was 4.1% (Table 3.4).

Figure 3.4: International scheduled aircraft arrivals, 2005 & 2014

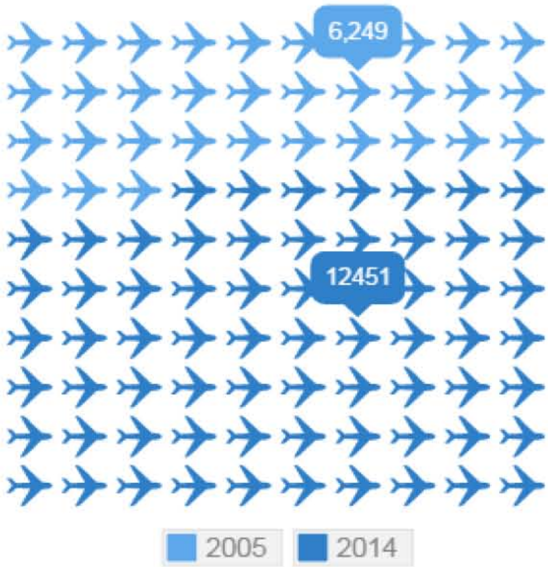
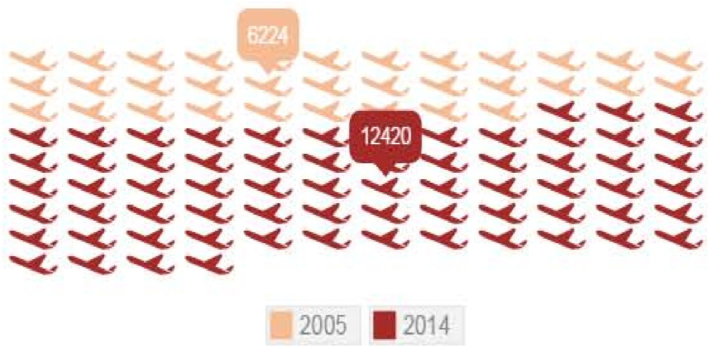


Table 3.3: International scheduled arrivals, departures, and total movement of aircraft, 2005-2014

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals	6,249	6,868	7,950	8,738	8,655	10,534	11,145	11,041	11,720	12,451
% Annual change		9.9	15.8	9.9	-0.9	21.7	5.8	-0.9	6.1	6.2
Departures	6,224	6,865	7,773	8,743	8,646	10,538	11,139	11,041	11,717	12,420
% Annual change		10.3	13.2	12.5	-1.1	21.9	5.7	-0.9	6.1	6.0
Total	12,473	13,733	15,723	17,481	17,301	21,072	22,284	22,082	23,437	24,871
% Annual change		10.1	14.5	11.2	-1	21.8	5.8	-0.9	6.1	6.1

Source: Ghana Civil Aviation Authority

Figure 3.5: International scheduled aircraft departures, 2005& 2014



Aircraft departures showed a similar trend as that of arrivals, recording a decline in 2009 and 2012 of 1.1% and 0.9% respectively. Despite the decline, overall aircraft departures nearly doubled during the ten-year period from 6,224 to 12,420 (Table 3.3 & Figure 3.5).

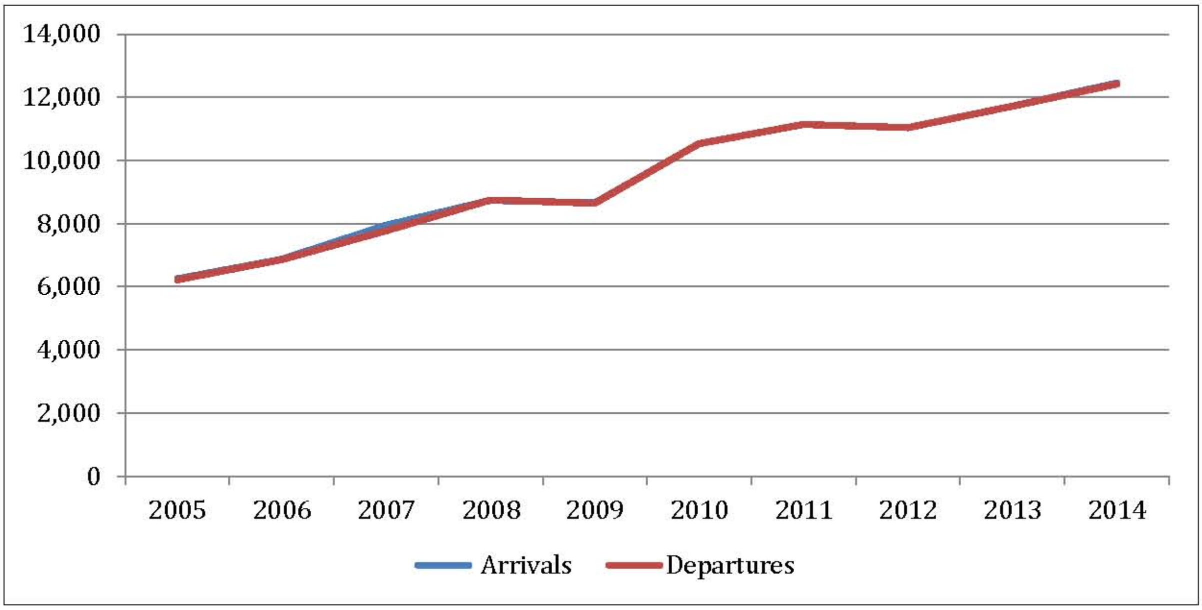
The average annual growth rate for total international scheduled aircraft movements was stronger in the first half of the period (2005-2009) at 8.2% while growth halved in the second half of the period recording 4.1% (Table 3.4). The situation for international aircraft arrivals and departures is similar to that for international passengers, showing a general upward trend but with stronger growth in the first half of the period than in the second.

Table 3.4: Trends in international scheduled aircraft movements, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
Year	2005 - 2014	2005-2009	2010-2014	2005-2014
Arrivals	6,202	8.1	4.1	7.7
Departures	6,196	8.2	4.1	7.7
Total movements	12,398	8.2	4.1	7.7

Figure 3.6 indicates that aircraft arrivals and departures showed a positive increase from 2005 to 2014 but both dipped in 2009 and 2012 but recorded increases again up to 2014.

Figure 3.6: International aircraft arrivals and departures, 2005-2014



3.4 Domestic Air Passenger Movements

Tables 3.5 and 3.6 present data on domestic air passenger movements from 2007 to 2014 (data for 2005-2006 were unavailable). This data applies to only arrivals at the Kotoka International Airport located in the nation's capital, Accra. Overall, the data show a dramatic increase in both arrivals and departures from 2011 onwards.

Table 3.5 shows a total of 42,796 domestic air passenger arrivals at the Kotoka International Airport in 2007, and this number increased to 87,635 in 2011, before recording a substantial increase to 360,222 in 2014, showing an increase of 741.7% since 2007 (Table 3.5 & Figure 3.7). The average annual growth rate from 2007 to 2014 was 30.4% (Table 3.6).

Figure 3.7: Domestic air passenger arrivals, 2007, 2011, 2014

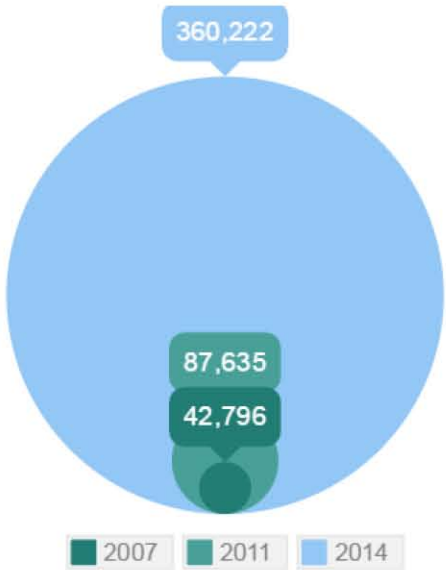


Table 3.5: Domestic air passenger movements, 2007-2014

Year	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals	42,796	63,766	61,370	64,517	87,635	249,766	380,921	360,222
% annual change	-	49.0	-3.8	4.4	36.8	185.0	52.5	-5.4
Departures	42,370	68,526	60,689	68,405	111,438	293,613	397,545	359,012
% annual change	-	61.7	-11.4	12.7	62.9	163.5	35.4	-9.7
Total movements	85,166	132,292	122,059	132,922	199,073	543,379	778,466	719,234
% annual change	-	55.3	-7.7	8.9	49.8	173.0	43.3	-7.6

Source: Ghana Civil Aviation Authority

Domestic air passenger departures showed a similar trend, recording 42,370 departures in 2007 before rising to 111,438 in 2011, and then to 359,012 in 2014 (Table 3.5 & Figure 3.8), an increase of 747.3% between 2007 and 2014, at an average annual growth rate of 30.5% (Table 4.6).

Figure 3.8: Domestic air passenger departures, 2007, 2011, 2014

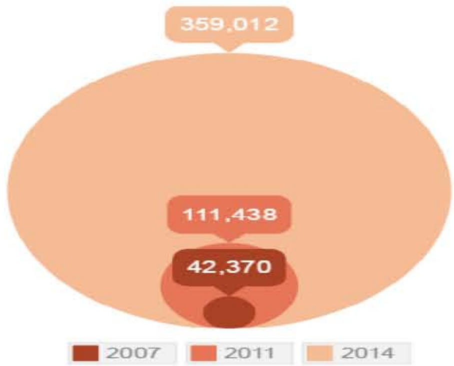
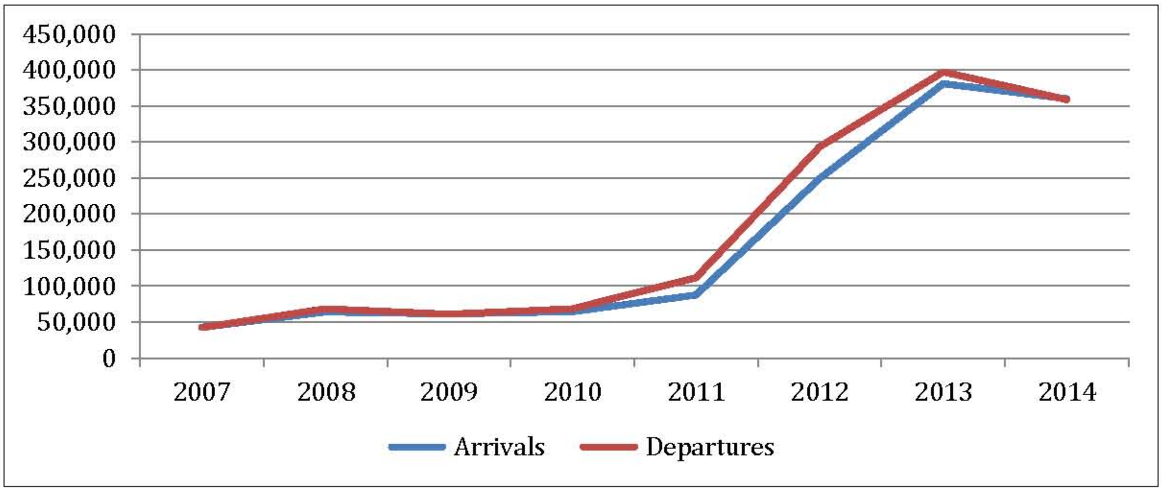


Figure 3.9 shows that from 2007 to 2010, passenger arrivals and departures were almost the same. However, from 2010-2013, arrivals and departures increased sharply to approximately 380,000 and 397,000 respectively, showing departures were higher than arrivals. Both arrivals and departures dipped slightly from 2013 to 2014.

Figure 3.9: Domestic air passenger arrivals and departures, 2007-2014



The average annual growth rate for total movements of domestic air passengers was substantially higher from 2011 to 2014 (42.8%) than 2007 to 2010 (14.8%) (Table 3.6).

Table 3.6: Trends in domestic air passenger movements, 2007-2014

Year	Increase between 2007 - 2014	Average Annual Growth Rate (%) 2007-2010	2011-2014	2007-2014
Arrivals	317,426	13.7	47.1	30.4
Departures	316,642	16.0	39.0	30.5
Total movements	634,068	14.8	42.8	30.5

Source: Ghana Civil Aviation Authority

Thus, the situation for domestic air passengers is quite different from that of international passengers with strong growth in the latter part of the period.

3.5 Domestic Aircraft Movements

In 2007, 2,298 aircrafts departed and arrived within the country respectively, while in 2014 this number increased to 8,489 (Table 3.7). Thus, total movements increased from 4,596 in 2007 to 16,978 in 2014 (Table 4.7 & and Figure 4.10), an increase of 269%.

Between 2007 and 2010, total domestic aircraft movements showed an average annual growth rate of 22.8% (Table 3.8). From 2011 to 2014, domestic aircraft arrivals showed a 21.3% increase, while departures increased at a lower rate of 13.4%. The overall annual average growth rate for total movement of domestic aircraft was 18.7% (Table 3.8).

Figure 3.10: Domestic aircraft movements, 2007 & 2014

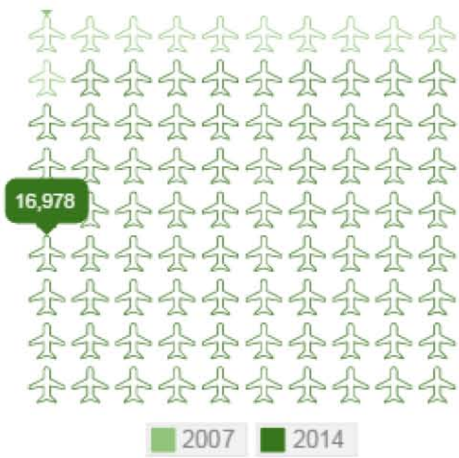


Table 3.7: Domestic aircraft movements, 2007-2014

Year	2007	2008	2009	2010	2011	2012	2013	2014
Aircraft arrivals	2,298	2,977	3,371	4,549	4,483	7,176	9,248	8,489
% annual change	-	29.5	13.2	34.9	-1.5	60.1	28.9	-8.2
Aircraft departures	2,298	2,977	3,295	4,549	5,672	7,176	9,249	8,489
% annual change	-	29.5	10.7	38.1	24.7	26.5	28.9	-8.2
Total movements	4,596	5,954	6,666	9,098	10,155	14,352	18,497	16,978
% annual change		29.5	12.0	36.5	11.6	41.3	28.9	-8.2

Source: Ghana Civil Aviation Authority

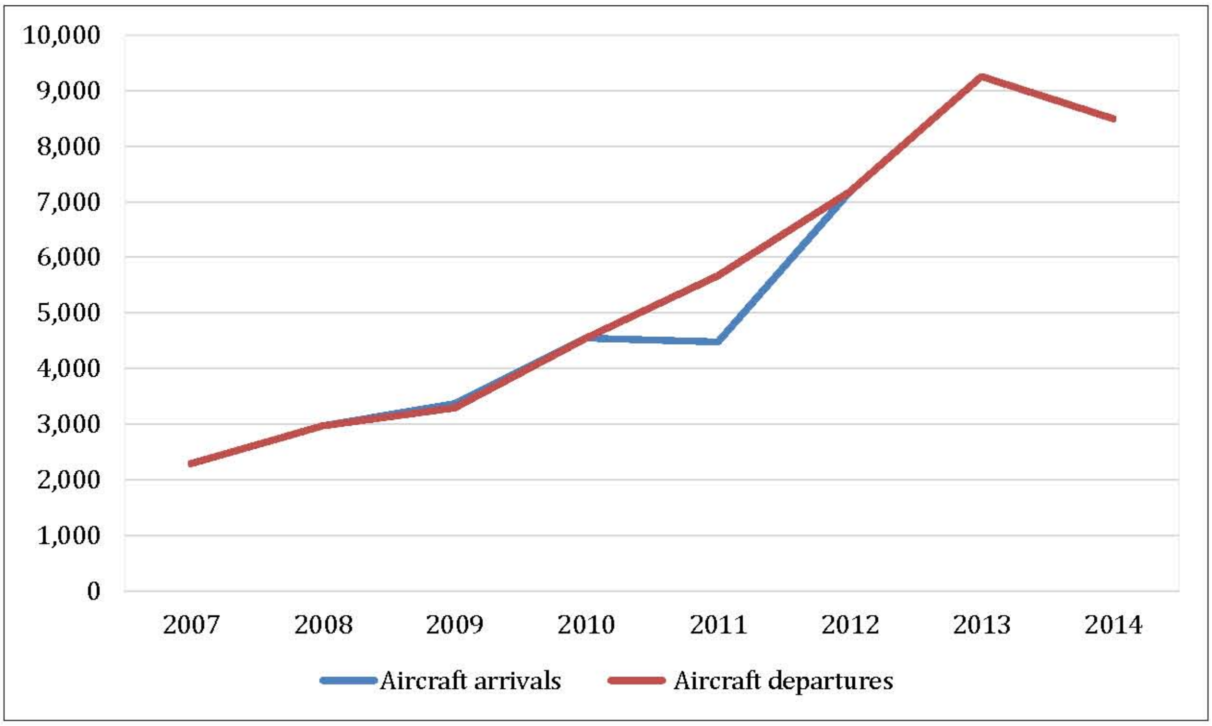
Table 3.8: Trends of domestic aircraft movements, 2007-2014

	Increase between	Average Annual Growth Rate (%)		
Year	2007 - 2014	2007-2010	2011-2014	2007-2014
Arrivals	6,191	22.8	21.3	18.7
Departures	6,191	22.8	13.4	18.7
Total movements	12,382	22.8	17.1	18.7

The trend for domestic aircraft movement was the opposite of that of domestic passengers, with stronger growth in the early part of the period under question.

From Figure 3.11, aircraft movements peaked in 2013 before declining slightly in 2014.

Figure 3.11: Arrival and departure of domestic aircraft, 2007-2014



4. VISITOR NUMBERSAND REVENUE ACCRUING TO SELECTED TOURIST SITES

4.1 Introduction

This chapter discusses trends of visitor arrivals (international and domestic) and revenue accruing to both historical and eco-tourism sites in the country. Revenue realized from these sites comprises the money paid by visitors as entrance fees, fees for use of cameras and videos, tour guide fees, etc. Fifteen selected major tourist sites and fifteen selected eco-tourism sites are considered in the analysis.

Arrivals to both major tourist sites and eco-tourist sites increased over the period 2005 to 2014. Real revenue however, remained stagnant for major tourist sites (increasing from GH¢490,000 in 2005 to GH¢492,000 in 2014) while eco-tourist sites have overall seen a drop in real revenue (GH¢150,700 to GH¢124,500). Both categories saw an overall drop in average spend per visitor.

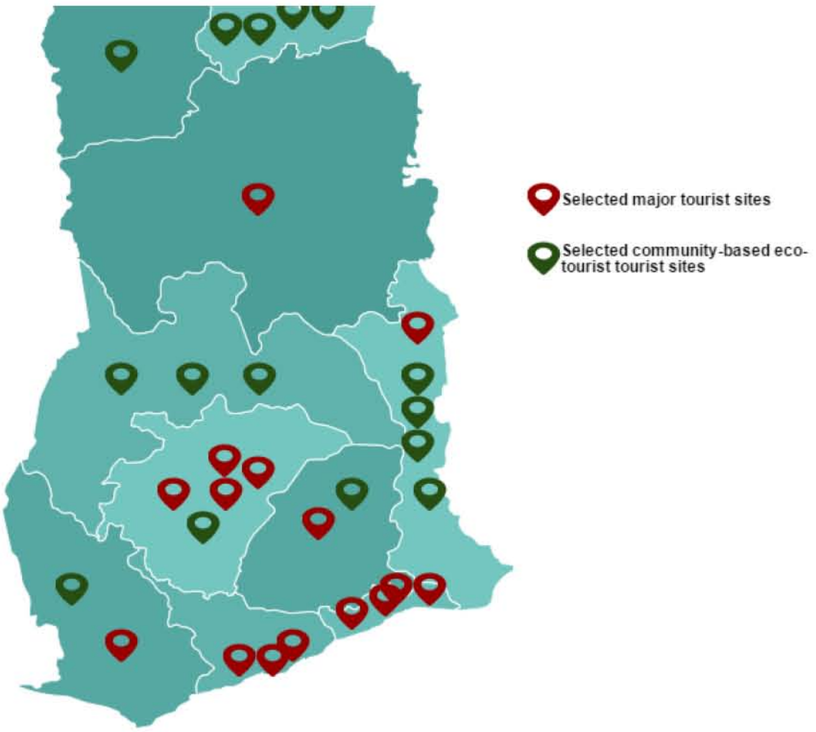
By 2014, Kakum Conservation Area had become the major tourist site for most visitors, and Central and Ashanti regions accounted for the largest share of visitors across the country. In the same year, Kintampo Waterfalls accounted for the greatest share of visitors to community-based eco-tourim sites, and visitors from Volta and Brong Ahafo regions constituted the most visitors to this category of tourist sites.

4.2 Tourist Sites in Ghana

Ghana's tourist attractions can be divided into two broad categories: major tourist sites and eco-tourism sites. This report, examines 15 major tourist sites selected on the basis of their high volume of visitors and revenue and 15 selected community based eco-tourism sites, which are managed by the communities and/or Non-Governmental Organizations (NGOs) and government.

Figure 4.1 shows the distribution of these sites around the country. Each region has at least one major or eco-tourism site. Major tourist sites are concentrated in the south of the country within Greater Accra and Ashanti regions, and along the coastline, while eco-tourism sites are more spread out and particularly dense in Volta, Upper East and Brong Ahafo regions.

Figure 4.1: Distribution of major tourist sites and community-based eco-tourism sites



4.2.1 Selected Major Tourist Sites

A short description of each of the major tourist sites discussed in this report is given below.

Eastern region

- **Aburi Botanical Gardens** is located at Aburi in the Eastern Region of Ghana.

Western region

- **The Ankasa National Park** was established in 1976 and was opened to the public in 2000. It covers circa 500 square kilometres situated in the Western Region of Ghana and is known for the diversity of its flora and fauna.

Volta region

- **Agumatsa Wildlife Sanctuary (Wli Waterfalls)** at Wli Afegame in the Volta Region is reputed to be one of the highest waterfalls in West Africa. With a total height of about 300 metres, half of the falls are found in Ghana with the other half in the Republic of Togo.

Central region

- **Cape Coast Castle** is located in Cape Coast in the Central Region
- **Elmina Castle** is located in Elmina also in the Central Region.
- **Kakum conservation area** is located about 35 kilometers north of Cape Coast in the Central Region. The conservation area covers 360 square kilometres and consists of Kakum National Park and Assin Attandanso Resource Reserve.

Ashanti region

- **Kumasi Armed Forces Museum** is located in Kumasi in the Ashanti region, and was originally built by the British in 1898 and now houses armed forces artefacts.
- **Manhyia Palace and Museum** is located in the middle of Kumasi. It is the official residence of the Asantehene (King of Ashanti). The large courtyard holds statues of past great Kings and Queen Mothers of the great Ashanti Kingdom.
- **The Prempeh II Museum** is located on the grounds of the Centre for National Culture in Kumasi. The museum houses a collection of Ashanti historical artefacts.
- **Kumasi Zoological Gardens** is located in the centre of Kumasi in the Ashanti Region and is home to a selection of Ghana's wildlife.

Greater Accra region

- **Kwame Nkrumah Memorial Park** is a national park located in the capital city of Accra and occupies an area of 5.4 acres.
- **Shai Hills Resource Reserve** is located within the Shai Traditional Area, in the Greater Accra Region. It covers 51 square kilometers and is situated on the Accra Plains. It consists of five hills, the highest standing at 290 meters. The site was declared a forest reserve in 1962.
- **The W. E. B. Du Bois Memorial Centre** was created in Accra in 1985 as a research institution for Pan-African history and culture, and as a centre for African/Diasporan creativity and the promotion of the social, political and cultural legacy of Dr. W. E. B. Du Bois himself.
- **The National Museum of Ghana** is located in Adabaraka, in Ghana's capital, Accra. It was opened in 1957 as part of Ghana's independence celebrations. It is the largest and oldest among six museums currently under the management of the Ghana Museum and Monuments Board.

Northern region

- **Mole National Park** can be found near Damango in the Northern Region. It is the largest and most developed protected area for eco-tourism and nature conservation in the country. It covers an area of 4,849 square kilometers and the Park's vegetation of wooded Guinea Savannah is home to a large variety of wildlife.

4.2.2 Selected Community-Based Eco–Tourism Sites

A total of fifteen community-based eco-tourism sites were selected for analysis.

Eastern region

- **The Bunso Arboretum,** which is located in the Eastern region, is a protected forest reserve, spanning 16.5 hectares.

Western region

- **Nzulezu** is a stilt village on Lake Tandane, about 45 minutes inland by canoe from the town of Benin. The site was added to the UNESCO World Heritage Tentative List in 2000 in the cultural category. It is located ninety kilometers west of Takoradi in the Jomoro District of the Western Region of Ghana.

Volta region

- **Amedzofe Tourist Centre** is a community-based eco-tourism site located 36 kilometres North-West of Ho, the capital of the Volta region.
- **Liate Wote Monkey Sanctuary** is located in the heart of the Volta Region at the foot of the range of mountains that run along the Ghana/Togo border.
- **Tafi Atome Monkey Sanctuary** is also located in the heart of the Volta Region, 43 kilometres south of Hohoe and less than 200 kilometers north of Accra. Tafi Atome is surrounded by an indigenous tropical forest with a very high concentration of flora. One can also find the endangered True Mona monkeys in this forest.
- **Xavi Birds Watching and Cultural Canoe Tours** is located in Akasti District in the Volta region.

Ashanti region

- **Bobiri Forest and Butterfly Sanctuary** is located 30 kilometres from Kumasi and is found 25 kilometres between Hwereso and Duapomfo along the Kumasi-Accra highway in the Ashanti Region. The site is 54.5 square kilometers of virgin, semi-deciduous tropical rain forest.

Brong Ahafo region

- **Boabeng-Fiema Monkey Sanctuary** covers a 4.4 square kilometre piece of forest and is situated between two villages: Boabeng and Fiema, in the Brong Ahafo region.
- **Kintampo Waterfalls** is located at Kintampo in the Brong Ahafo region and is one of the highest waterfalls in Ghana.
- **Tano Boase Sacred Grove** is found in Tano Boase in the Brong Ahafo region. The Sacred Grove features rock formations and is the source of the Tano River which empties into the sea 300 kilometres away on the coast of Cote D'Ivoire.

Upper East region

- **Sirigu** is located in the Upper East region and is known for its pottery, basket weaving and unique symbolic wall decorations.
- **Tongo Hills and Tengzug Shrines** constitute a unique cultural landscape. The site is located at Tongo and Tengzug in the Upper East Region. The area can boast of outstanding natural beauty and cultural richness and is known for its shrines and caves.
- **Paga Crocodile Pond** is located at Paga in the Upper East Region and is a sanctuary for crocodiles.
- **Pikworo Slave Camp** is located in Paga in the Upper East region of Ghana.

Upper West region

- **The Wechiau Community Hippo Sanctuary** (WCHS) is a unique community-based project, protecting and preserving the wildlife and the environment of a 40 kilometer stretch of the Black Volta River.

4.3 Visitor Arrivals and Nominal Revenue Accruing to Selected Major Tourist Sites

Table 4.1 reports on visitor arrivals and nominal revenue accruing to selected major tourist sites from 2005 to 2014. Total visitor numbers increased from 381.6 thousand in 2005 to 592.3 thousand in 2014, an increase of 55.21% (Table 4.1). Visitor figures show negative year on year growth in 2009, 2013 and 2014. The largest increase in visitor figures was in 2006 (an increase of 33.3%) while the greatest decrease was in 2014, when visitor numbers declined by 18% over the previous year (Table 4.1).

Table 4.1: Visitor arrivals and nominal revenue accruing to selected major tourist sites, 2005-2014

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals (thousand)	381.6	508.8	603.6	613.7	585.6	616.5	664.1	742.7	722.3	592.3
Annual change (%)		33.3	18.6	1.7	-4.6	5.3	7.7	11.8	-2.7	-18.0
Nominal revenue ('000 Gh¢)	490.0	745.2	935.2	1,020.3	1,076.3	1,067.9	1,374.3	1,290.1	1,451.4	1,433.2
Annual change (%)		52.1	25.5	9.1	5.5	-0.8	28.7	-6.1	12.5	-1.3

Source: Ghana Museums and Monuments Authority, Ghana Tourism Authority, the Wildlife Division and Ghana Statistical Service

Nominal revenue figures provided by Ghana Revenue Authority for 2005, 2006 and 2007 have been converted from Second Ghana Cedi currency to Third Ghana Cedi currency, which came into effect in 2008 due to inflation, using a ratio of 1 Third Cedi= 10,000 Second Cedis.

Due to missing data, some figures have been calculated based on visitor numbers and closest previous year average revenue accruing per visitor.

Nominal revenue rose from GH¢490,000 in 2005 to GH¢14,332,000 in 2014, an increase of 192.5% (Table 4.1). The largest increase in revenue was in 2006 (an increase of 52.1% over the 2005 figure) while the greatest decrease was in 2012, with revenue declining by 6.1% compared to the 2011 figure (Table 4.1).

4.4 Real Revenue Accruing to Major Tourist Sites

Real revenue is revenue adjusted for inflation, enabling comparison of quantities as if prices had not changed. Tables 4.2 and 4.3 outline the trends of real revenue accruing to selected major tourist sites from 2005 to 2014.

Real revenue rose marginally from GH¢490,000 in 2005 to GH¢4,922,000 in 2014 (Table 4.2). The largest increase was in 2006 (up by 35.45% over 2005 figures) while the most substantial decrease was in 2014, down 14.5% from the 2013 figure (Table 4.2).

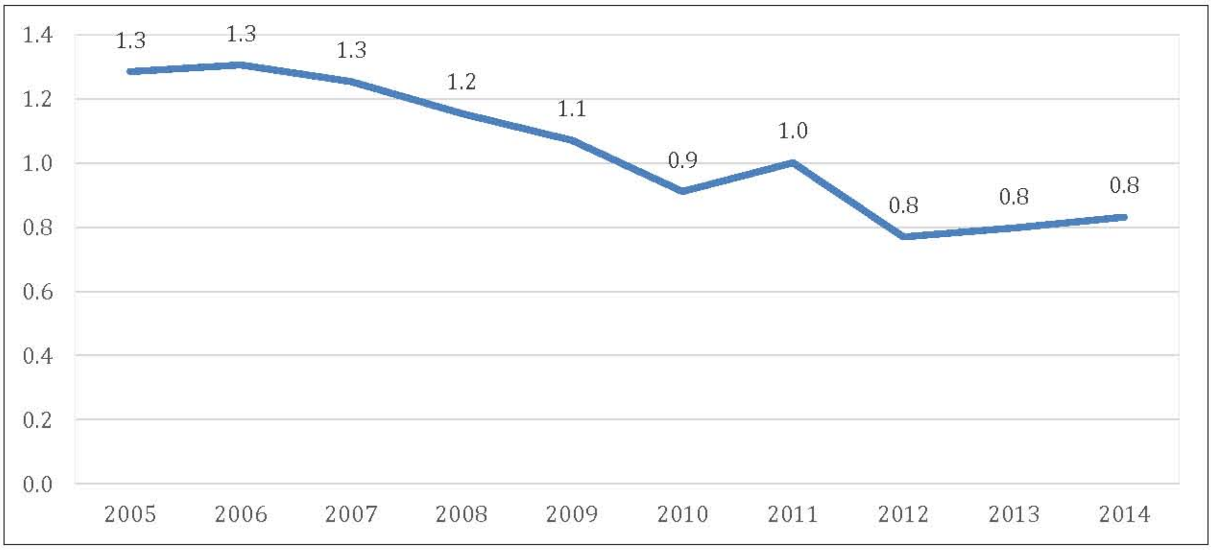
Table 4.2: Real revenue accruing to selected major tourist sites, 2005-2014 (2005=100)

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Real revenue ('000 Gh¢)	490.0	663.7	756.2	708.1	626.4	561.3	664.4	571.4	575.7	492.2
Annual change (%)	-	35.45	13.94	-6.37	-11.54	-10.38	18.36	-14.00	0.75	-14.50
Average spend/arrival	1.28	1.30	1.25	1.15	1.07	0.91	1.00	0.77	0.80	0.83

Source: Calculated based on nominal revenue figures in Table 4.1 using the Consumer Price Index (figures available in Appendix 1).

The average spend per arrival to a tourist site fluctuated somewhat over the period, decreasing from GH¢1.30 in 2005 to GH¢0.83 in 2014 (Table 4.2 & Figure 4.3), a decrease of 14.75%.

Figure 4.2: Average spend per arrival to selected major tourist sites, 2005-2014



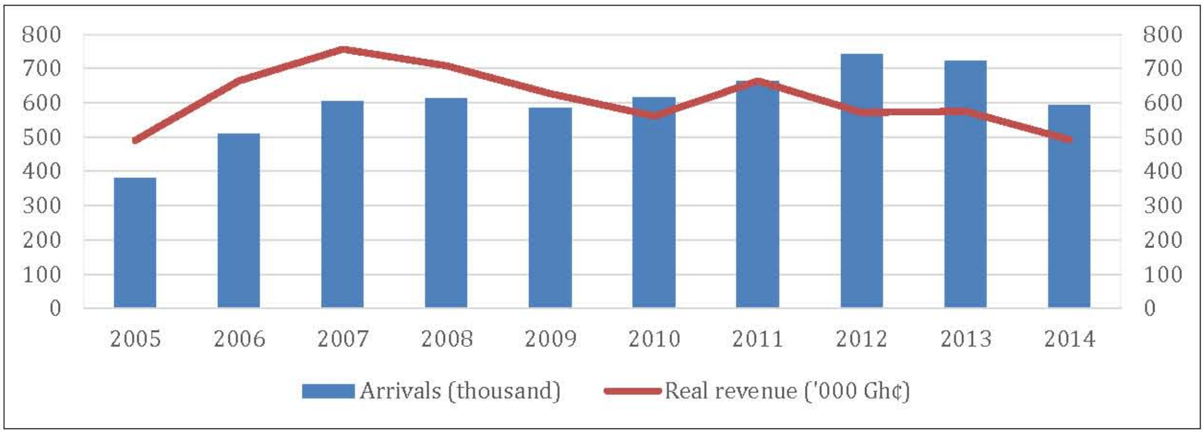
Visitor arrivals increased between 2005 and 2014 at an average annual growth rate of 4.9% while real revenue increased by just 0.1% on average for this period (Table 4.3). Both arrivals and revenue rose on average in the first half of the period, by 10.7% and 6.1% respectively, while in the latter half of the period, both decreased on average by 1.0% and 3.3% respectively (Table 4.3).

Table 4.3: Trends of total visitor arrivals and real revenue accruing to selected major tourist sites and average spend per visitor, 2005-2014

Category	Increase Between	Average Annual Growth Rate (%)		
	2005 & 2014	2005-2009	2010-2014	2005-2014
Visitor Arrivals(Thousand)	210.7	10.7	-1.0	4.9
Real revenue (Thousand Ghana Cedis)	2.3	6.1	-3.3	0.1

Figure 4.3 shows visitor arrivals to selected major tourist sites against real revenue and indicates that while visitor arrivals peaked in 2012, real revenue showed a generally downward trend from 2007 onwards with a slight increase in 2011.

Figure 4.3: Visitor arrivals and revenue accruing to selected major tourist sites, 2005-2014



4.5 Visitor Arrivals to Specific Selected Major Tourist Sites

Tables 4.4 and 4.5 report on the trends of visitor arrivals to selected major tourist sites from 2005 to 2014 while Figure 4.4 shows the breakdown of visitor numbers by site in 2014.

Table 4.4: Visitor arrivals by selected major tourist sites, 2005 – 2014

	VISITOR ARRIVALS ('000)									
Tourist Site	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Aburi Botanical Gardens	37.0	27.7	29.8	27.5	36.0	35.3	30.3	33.9	25.4	25.4
Ankasa National Park	1.2	1.2	1.2	1.1	0.8	1.4	1.5	3.9	1.6	0.8
Agumatsa Wildlife Sanctuary	11.4	15.1	17.8	16.9	17.3	17.1	30.2	41.3	69.9	23.6
Cape Coast Castle	45.9	74.6	74.3	60.8	76.5	89.0	97.7	110.2	85.9	68.7
Elmina Castle	42.0	47.8	65.7	60.1	74.6	79.7	81.7	92.5	73.8	58.1
Kakum National Park	64.2	108.3	112.3	121.7	150.8	155.1	157.5	165.3	165.5	159.8
Kumasi Armed Forces Museum	20.8	10.7	13.1	9.8	7.0	1.9	7.2	6.4	0.7	3.3
Kumasi Manhyia Palace	30.8	38.7	48.4	42.6	44.8	49.9	51.9	53.0	51.0	47.7
Prempeh II Museum	7.4	7.5	15.2	10.9	13.5	8.1	10.7	11.4	13.3	15.7
Kumasi Zoological Gardens	48.7	51.9	110.7	129.9	78.5	57.7	67.2	82.3	67.6	50.8
Kwame Nkrumah Memorial Park	44.2	90.1	80.9	90.3	46.5	79.0	87.8	93.9	123.3	67.9
Shai Hills Resource Reserve	5.3	11.1	7.9	8.2	9.1	12.6	12.8	15.9	15.4	37.2
W.E.B. Du Bois Centre	1.5	2.6	3.9	3.5	2.6	2.2	1.0	0.9	0.4	3.1
Ghana National Museum	8.8	8.6	9.0	13.7	12.7	13.1	11.9	17.2	16.1	16.6
Mole National Park	12.3	12.7	13.7	16.8	14.8	14.3	14.7	14.6	12.5	13.5
Total Arrival	**381.6**	**508.8**	**603.6**	**613.7**	**585.6**	**616.5**	**664.1**	**742.7**	**722.3**	**592.3**

Source: Ghana Museums & Monuments Board, Ghana Tourism Authority, Ghana Statistical Service &Wildlife Division

Aburi Botanical Gardens

For the ten year period 2005-2014, visitor arrivals to Aburi Botanical Gardens declined from 37,000 to 25,400 (Table 4.4), at an annual average rate of 4.2% (Table 4.5). Its market share of visitor arrivals in 2005 was 9.7%, but this decreased to 4.3% in 2014. Between 2005 and 2009, arrivals declined at an average annual rate of 0.7%, while from 2010-2014, visitor arrivals reduced, on average, by 8.2% a year (Table 4.5).

Ankasa National Park

In 2005, 1,200 visitor arrivals were recorded at Ankasa National Park, which reduced to 800 in 2014 (Table 4.4). Its market share reduced from 0.3% in 2005 to 0.1% in 2014 (Table 4.5). In 2014, Ankasa had the lowest number of visitors compared with any of the tourist sites considered (Table 4.4 & Figure 4.4).

Agumatsa Wildlife Sanctuary (Wli Waterfalls)

Visitor arrivals to the Agumatsa Wildlife Sanctuary increased steadily from 11,400 in 2005 to 23,600 in 2014. The sanctuary's market share increased from 3% in 2005 to 4% in 2014. From 2005 to 2014, visitor arrivals to the sanctuary showed an average annual growth rate of 8.1%.

Cape Coast Castle

Cape Coast Castle recorded 45,900 visitor arrivals in 2005, increasing to 68,700 in 2014, making it the second largest contributor to tourist arrivals in that year (Table 4.4), recording an increase of 49.7%, at an average annual rate of 4.5% (Table 4.5). Its share of total arrivals decreased from 12% in 2005 to 11.6% in 2014 (Table 4.5).

Elmina Castle

Visitor arrivals to Elmina Castle increased from 42,000 in 2005 to 58,100 in 2014 (Table 4.4). During the period 2005–2009, visitor arrivals increased at an average annual rate of 14.3% while from 2010 to 2014, the average yearly growth rate was -7.9% (Table 4.5). The market share accounted for by visitors to the castle decreased from 11% in 2005 to 9.8% in 2014 (Table 4.5).

Table 4.5: Trends of visitor arrivals by selected major tourist sites, 2005 – 2014

Tourist Site	Growth rate (%)				Market Share				Average annual growth rate (%)		
	2005-2006	2007-2008	2010-2011	2013-2014	2005	2008	2011	2014	2005-2009	2010-2014	2005-2014
Aburi Botanical Gardens	-25.2	-7.7	-14.1	-0.2	9.7	4.5	4.6	4.3	-0.7	-8.2	-4.2
Ankasa National Park	0.3	-7.2	7.3	-51.4	0.3	0.2	0.2	0.1	-8.9	-15.1	-5.1
Agumatsa Wildlife Sanctuary	33.2	-5.2	76.7	-66.2	3.0	2.7	4.6	4.0	10.6	8.1	8.1
Cape Coast Castle	62.7	-18.1	9.7	-20.1	12.0	9.9	14.7	11.6	12.8	-6.5	4.5
Elmina Castle	13.8	-8.5	2.4	-21.3	11.0	9.8	12.3	9.8	14.3	-7.9	3.6
Kakum National Park	68.6	8.4	1.5	-3.4	16.8	19.8	23.7	27.0	21.3	0.7	10.1
Kumasi Armed Forces Museum	-48.5	-25.1	288.4	348.9	5.5	1.6	1.1	0.6	-27.1	14.4	-20.4
Kumasi Manhyia Palace	25.7	-11.8	3.9	-6.4	8.1	6.9	7.8	8.1	9.4	-1.1	4.9
Prempeh II Museum	0.9	-28.5	31.1	18.0	1.9	1.8	1.6	2.7	15.0	16.5	8.4
Kumasi Zoological Gardens	6.6	17.4	16.4	-24.8	12.8	21.2	10.1	8.6	11.9	-3.2	0.5
Kwame Nkrumah Memorial Park	103.7	11.7	11.2	-44.9	11.6	14.7	13.2	11.5	1.3	-3.8	4.8
Shai Hills Resource Reserve	107.7	4.0	1.8	141.8	1.4	1.3	1.9	6.3	13.3	27.0	21.6
W.E.B. Du Bois Centre	74.2	-10.6	-55.8	605.1	0.4	0.6	0.1	0.5	13.9	7.9	7.9
Ghana National Museum	-2.0	51.9	-8.6	3.6	2.3	2.2	1.8	2.8	9.2	6.1	7.1
Mole National Park	3.8	22.4	2.5	8.3	3.2	2.7	2.2	2.3	4.6	-1.5	1.0
Total Arrival	**33.3**	**1.7**	**7.7**	**-18.0**	**100.0**	**100.0**	**100.0**	**100.0**	**10.7**	**-1.0**	**4.9**

Source: Ghana Museums & Monuments Board, Ghana Tourism Authority, Ghana Statistical Service &Wildlife Division

Kakum National Park

Arrivals to Kakum National Park increased from 64,200 in 2005 to 159,800 in 2014, making it the site with the largest number of visitors in that year (Table 4.4 & Figure 4.4). From 2005 to 2009, arrivals grew at an average annual rate of 21.3%, but from 2010-2014, arrivals grew by just 0.7% (Table 4.5). Over the entire period (2005-2014), arrivals increased at an average annual rate of 10.1% (Table 4.5). The Park's market share increased from 16.8% in 2005 to 27% in 2014 (Table 4.5), contributing over one-fifth of the total arrivals to the country's major tourist sites.

Kumasi Armed Forces Museum

Visitor arrivals to the Armed Forces Museum in Kumasi declined from 20,800 in 2005 to 3,300 in 2014 (Table 4.4). Its share of arrivals declined from 5.5% in 2005 to 0.6% in 2014 (Table 4.5). Between 2005 and 2014, arrivals to the Museum declined on average by 20.4% per year (Table 4.5).

Kumasi Manhyia Palace

A total of 30,800 visitors arrived at Manhyia Palace in 2005, and in 2014, visitor arrivals reached 47,700 (Table 4.4), at an average annual growth rate of 4.9% over the ten year period (Table 4.5). The share in arrivals did not change between 2005 and 2014, but remained at 8.1% (Table 4.5).

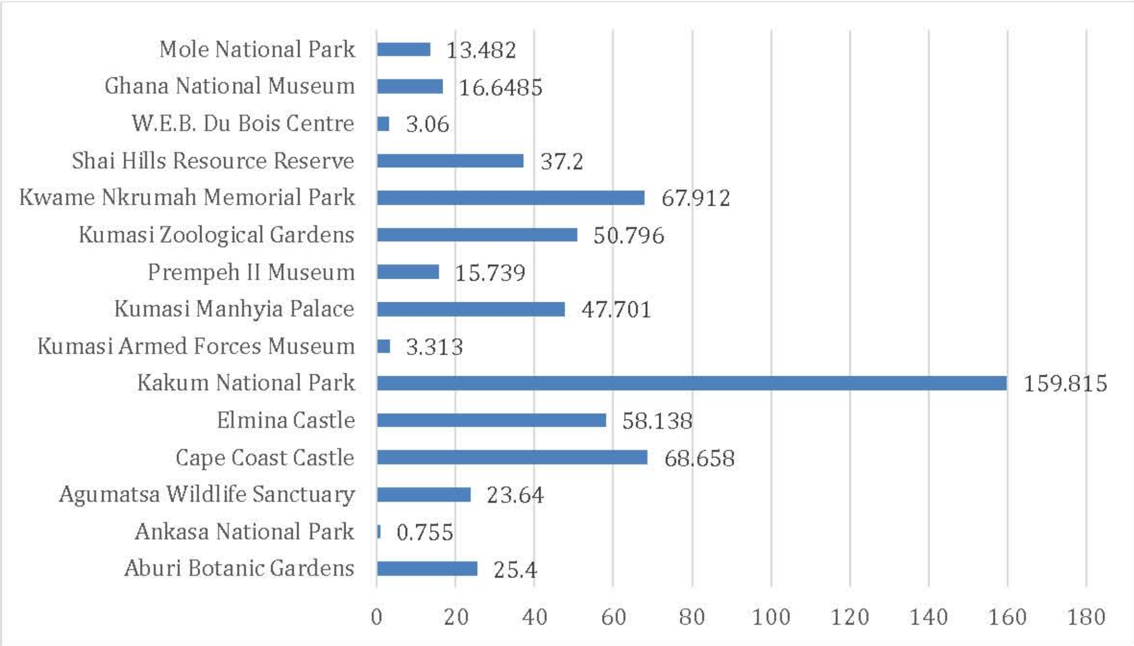
Prempeh II Museum

In 2005, there were 7,400 visitor arrivals to the Museum, increasing to 15,700 in 2014 (Table 4.4), at an average annual rate of 8.4% (Table 4.5). Its share in arrivals increased from 1.9% in 2005 to 2.7% in 2014 (Table 4.5).

Kumasi Zoological Gardens

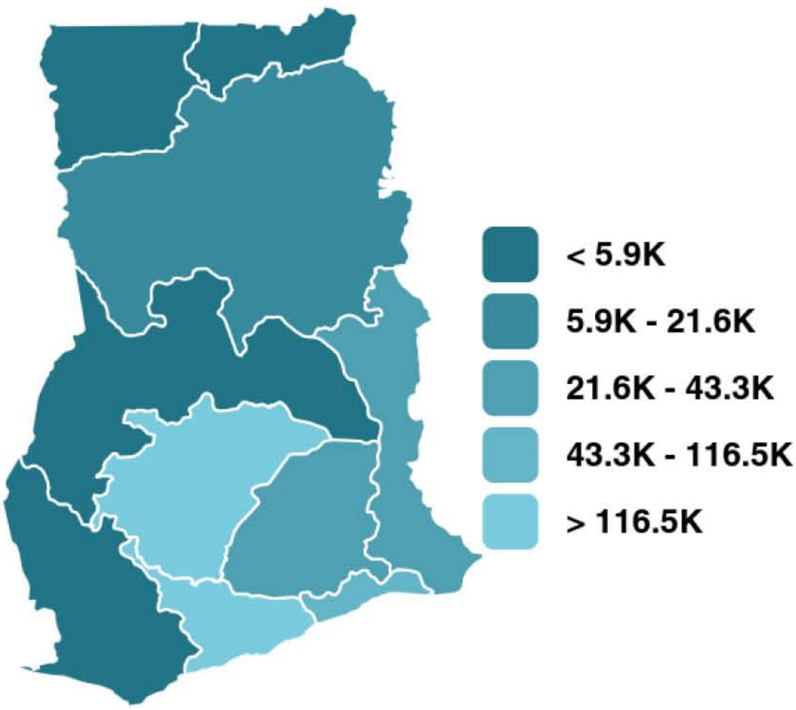
Visitor arrivals to Kumasi Zoological Gardens increased marginally from 48,700 in 2005 to 50,800 in 2014 (Table 4.4), at an average annual rate of 0.5% (Table 4.5). The share of the total visitors accounted for by the Gardens decreased from 12.8% in 2005 to 8.6% in 2014 (Table 4.5).

Figure 4.4: Visitor figures to selected major tourism sites, 2014



By 2014, Central and Ashanti regions accounted for the higher visitor figures across the country.

Figure 4.5: Map of visitors to selected major tourist sites by region, 2014



Kwame Nkrumah Memorial Park

From 2005 to 2014, visitor arrivals to Kwame Nkrumah Memorial Park in Accra increased from 44,200 to 67,900 (Table 4.4). Over the entire period, visitor arrivals to the Park grew at an average yearly rate of 4.8% (Table 4.5). The Park's share of total arrivals was 11.6% in 2005, but this decreased slightly to 11.5% in 2014 (Table 4.5).

Shai Hills Resource Reserve

Shai Hills Resource Reserve recorded 5,300 arrivals in 2005, which increased substantially to 37,200 in 2014, at an average annual rate of 21.6% (Tables 4.4 & 4.5). Its market share increased from 1.4% in 2005 to 6.3% in 2014 (Table 4.5).

W.E.B. Du Bois Centre

In 2005, there were 1,500 visitor arrivals to the W.E.B. Du Bois Centre, which increased to 3,100 in 2014 at an average annual rate of 7.9% (Tables 4.4 & 4.5). The Centre's share in arrivals increased marginally from 0.4% in 2005 to 0.5% in 2014.

Ghana National Museums

From 2005 to 2014, visitor arrivals to Ghana National Museums doubled from 8,800 to 16,600 in 2014, growing at an annual average rate of 7.1% over the period (Tables 4.4 & 4.5). Its share in arrivals increased from 2.3% in 2005 to 2.8% in 2014 (Table 4.5).

Mole National Park

Visitor arrivals to Mole National Park rose from 12,300 in 2005 to 13,500 in 2014, at an average annual growth rate of 1% (Tables 4.4 & 4.5).The Park's market share dropped from 3.2% to 2.3% over the period (Table 4.5).

4.6 Visitor Arrivals and Nominal Revenue Accruing to Selected Community-Based Eco-Tourism Sites

Table 4.6 summarizes the number of visitor arrivals from 2005 to 2014 for selected community-based eco-tourism sites. Over the period, arrivals rose from 63,500 to 79,200 (Table 4.6), an increase of 24.7%. The greatest increase was in 2010, when visitor arrivals rose by 34.1% over the 2009 figure, while the largest decrease was in 2014, when arrivals dropped by 23.2% compared to 2013 (Table 4.6).

Nominal revenue also rose over the period, from GH¢1,507,000 to GH¢3,626,000 (Table 4.6), an increase of 140.6%. The largest increase was in 2012, with nominal revenue up 80.4% over the 2011 figure, while the greatest decrease was in 2006, when revenue fell by 36.7% (Table 4.6).

Table 4.6: Visitor arrivals and nominal revenue accruing to selected community-based eco-tourism sites, 2005–2014

Arrivals and revenue accruing	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Arrivals ('000)	63.5	54.9	69.8	70.3	88.2	118.3	125.2	123.2	103.1	79.2
% Annual change		-13.5	27.1	0.7	25.5	34.1	5.8	-1.6	-16.3	-23.2
Nominal revenue('000 GH¢)	150.7	95.4	98.0	142.3	199.6	289.8	248.9	448.8	441.5	362.6
% Annual change		-36.7	2.8	45.2	40.2	45.2	-14.1	80.4	-1.6	-17.9

Source: Ghana Museums & Monuments Board, Ghana Tourism Authority, Ghana Statistical Service &Wildlife Division

4.7 Real revenue accruing to selected community-based eco-tourism sites, 2005-2014

The conversion of nominal to real revenue reveals that revenue dropped from GH¢1,507,000 in 2005 to GH¢1,245,000 in 2014 (Table 4.7). The largest increase in real revenue was in 2012 (up by 65.22%) while there was substantial decrease in 2006 (down by 43.63%) (Table 4.7).

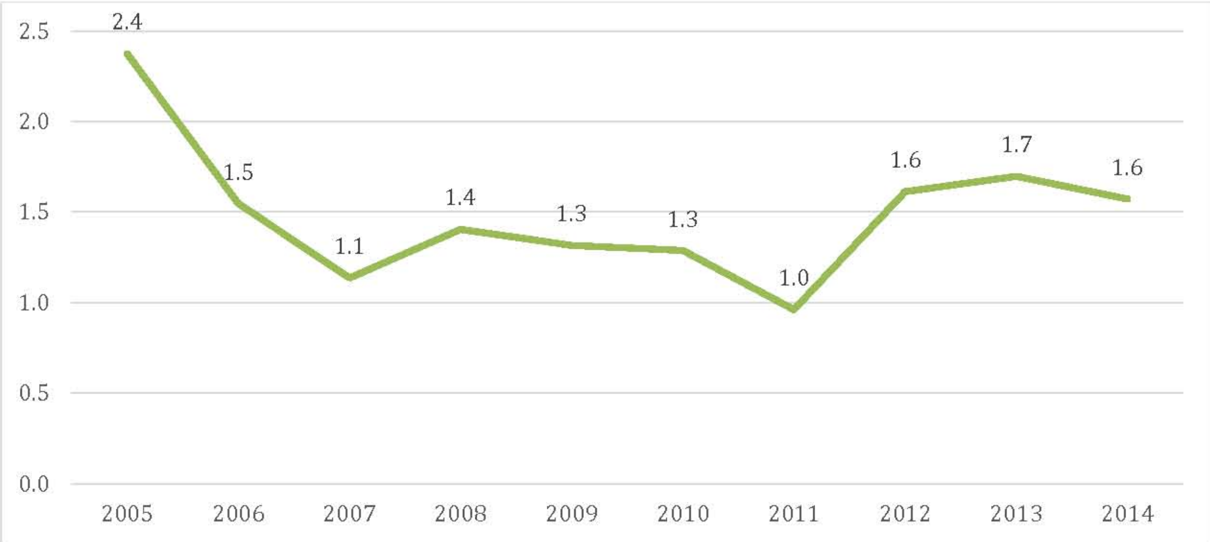
Table 4.7: Real revenue accruing to selected community-based eco-tourism sites and average spend per visitor, 2005-2014

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Real revenue ('000 Gh¢)	150.7	84.9	79.3	98.8	116.1	152.3	120.3	198.8	175.1	124.5
Annual change (%)		-43.63	-6.68	24.61	17.60	31.16	-21.02	65.22	-11.91	-28.87
Average spend/arrival	2.37	1.55	1.14	1.40	1.32	1.40	1.45	1.78	1.73	1.70

Source: Ghana Museums & Monuments Board, Ghana Tourism Authority, Ghana Statistical Service &Wildlife Division

Average spend per visitor to community-based eco-tourism sites dropped over the period from GH¢2.4 per arrival to GH¢1.60, reaching its lowest point of GH¢1.00 per arrival in 2011 (Figure 4.6).

Figure 4.6: Average spend per arrival to selected community-based eco-tourism sites, 2005-2014



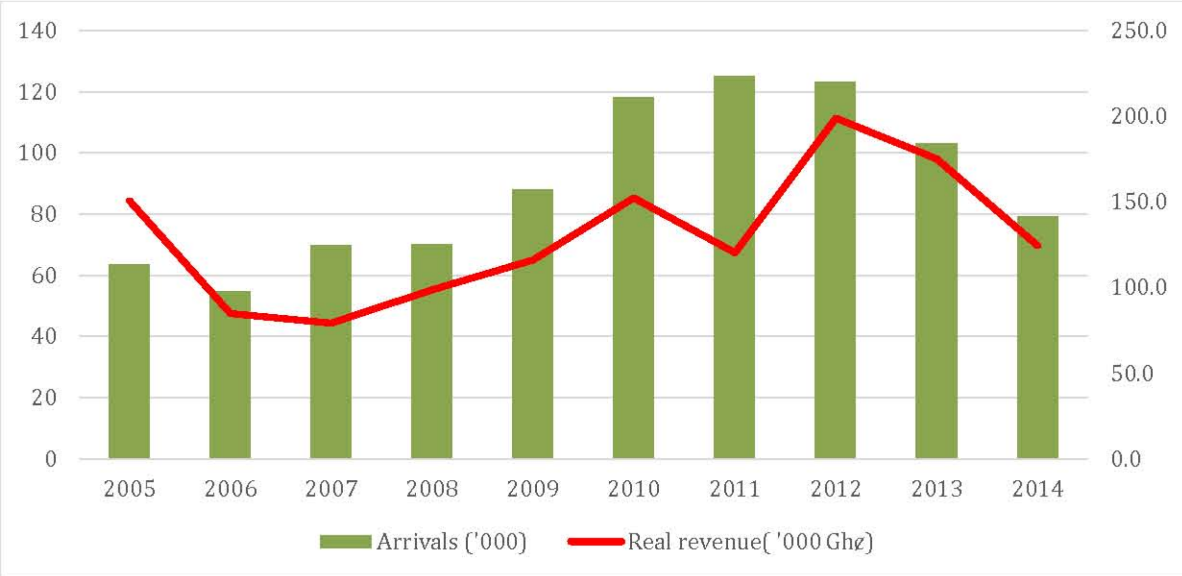
While visitor arrival figures grew at an annual average rate of 8.2% in the early part of the period, real revenue declined by 6.5% during the same period (Table 4.8). Both visitor and real revenue figures declined in the second half of the period, by 10% and 5% respectively (Table 4.8).

Table 4.8: Trends of total visitor arrivals and real revenue accruing to selected community-based eco-tourism sites, 2005-2014

Category	Increase Between	Average Annual Growth Rate (%)		
	2005 & 2014	2005-2009	2010-2014	2005-2014
Visitor Arrivals('000)	15.7	8.2	-10.0	2.5
Real revenue('000GH¢s)	-26.1	-6.5	-5.0	-2.1

Plotting visitor arrivals against real revenue, it is realized that revenue reached its lowest point in the same year that visitor numbers peaked (in 2011), while revenue peaked the following year before beginning to fall in 2013 and 2014, following the downward trend in visitor arrival figures (Figure 4.7).

Figure 4.7: Visitor arrivals and revenue accruing to selected community-based eco-tourism sites, 2005-2014



4.8 Visitor Arrivals to Specific Selected Community-Based Eco-Tourism Sites

Tables 4.9 & 4.10 present the trends of visitor arrivals to selected community-based eco-tourism sites from 2005 to 2014.

Table 4.9: Visitor arrivals by selected community-based eco-tourism sites, 2005-2014

	Visitor Arrivals ('000)									
	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Bunso	1.2	1.7	3.3	0.9	1.5	1.8	1.8	2.1	1.9	1.2
Nzulezu	4.8	6.0	6.6	10.6	8.7	11.9	14.3	13.0	13.2	10.8
Amedzofe Tourist Centre	1.4	1.7	3.3	1.6	1.0	1.2	1.3	1.2	1.9	1.7
Liate Wote	3.0	2.6	2.6	3.8	6.4	10.6	13.5	10.7	16.1	10.6
Tafi Atome	2.6	2.7	4.2	4.7	6.5	6.7	9.2	9.7	3.2	1.3
Xavi	0.3	0.4	0.2	0.1	0.1	0.2	0.1	0.1	0.0	0.0
Bobiri	0.2	1.3	1.7	3.2	2.3	3.0	3.5	3.9	4.4	3.3
Boabeng Fiema Monkey Sanctuary	10.4	11.2	14.9	13.9	18.2	15.6	15.1	16.1	17.1	13.9
Kintampo Water Falls	32.8	16.3	15.2	16.4	28.9	53.0	51.5	50.0	25.4	25.0
Tano Boase	0.8	1.3	2.5	1.2	1.7	1.2	1.3	1.2	4.5	2.9
Sirigu Sanctuary	1.5	1.7	2.3	3.0	1.8	2.0	2.0	2.0	2.1	1.1
Tongo Hills	0.7	0.9	1.2	1.3	1.4	1.7	1.7	1.3	1.4	0.9
Paga Crocodile Pond	2.4	5.0	8.8	6.1	4.5	4.8	4.6	5.7	3.9	2.6
Pikworo Nania	0.4	0.4	1.2	1.7	2.9	2.8	3.7	4.6	6.0	2.6
Wechiau Hippo	0.9	1.7	1.9	1.8	2.3	1.9	1.6	1.7	1.9	1.3
Total	**63.5**	**54.9**	**69.8**	**70.3**	**88.2**	**118.3**	**125.2**	**123.2**	**103.1**	**79.2**

Bunso Arboretum

Bunso Arboretum recorded an arrival figure of 1,200 in 2005, with the figure remaining the same in 2014 (Table 4.9). Arrivals to the site grew at an annual average rate of -0.1% throughout the period and the share of arrivals for this site decreased from 1.9% in 2005 to 1.6% in 2014 (Table 4.10).

Nzulezu

Nzulezu recorded an arrival figure of 4,800 in 2005, which increased to 8,900 in 2014 (Table 4.9), representing an 85% increase, at an average annual rate of 9.1% (Table 4.10). The site's market share of visitors increased significantly from 7.5% in 2005 to 14.7% in 2014 (Table 4.10).

Amedzofe Tourist Centre

In 2005, there were 1,400 visitor arrivals to the Amedzofe Tourist Centre, which increased to 1,700 in 2014 (Table 4.9), an increase of 21.4%. The Centre's market share in arrivals increased marginally from 2.2% in 2005 to 2.3% in 2014 (Table 4.10). The site recorded an average annual growth rate of 1.7% of visitor arrivals from 2005 to 2014 (Table 4.10).

Liate Wote Monkey Sanctuary

There were 3,000 visitor arrivals to Liate Wote Monkey Sanctuary in 2005, increasing to 10,600 in 2014 (Table 4.9). The Sanctuary's market share of arrivals increased from 4.7% in 2005 to 14.4% in 2014. Arrivals to the site increased at an average annual rate of 14.0% between 2005 and 2014 (Table4.10).

Tafi Atome Monkey Sanctuary

In 2005, there were 2,600 visitor arrivals to Tafi Atome Monkey Sanctuary, which decreased to 1,300 in 2014 (Table 4.9).From 2005 to 2014, arrivals to the site declined at an average annual rate of 8.1%. The site's market share in arrivals also decreased from 4.1% in 2005 to 1.7% in 2014 (Table 4.10).

Table 4.10: Trends of visitor arrivals by selected community-based eco-tourism sites, 2005 - 2014

Tourist Site	Growth rate (%)				Market Share				Average annual growth rate (%)		
	2005-2006	2007-2008	2010-2011	2013-2014	2005	2008	2011	2014	2005-2009	2010-2014	2005-2014
Bunso	41.0	-72.4	2.8	-37.7	1.9	1.3	2.2	1.6	5.4	-9.5	-0.1
Nzulezu	26.2	61.9	19.7	-18.0	7.5	15.1	17.2	14.7	15.0	-2.4	9.1
Amedzofe	18.9	-51.4	11.8	-12.6	2.2	2.3	1.6	2.3	-9.2	8.5	1.7
Liate Wote	-13.8	47.5	27.5	-34.0	4.7	5.5	16.3	14.4	19.1	0.1	14.0
Tafi Atome	3.5	11.4	37.4	-60.7	4.1	6.7	11.1	1.7	22.5	-41.6	-8.1
Xavi	19.7	-47.5	-74.2	-51.2	0.5	0.2	0.1	0.0	-24.2	-60.9	-29.5
Bobiri	640.3	90.9	20.0	-25.0	0.3	4.6	4.3	4.5	63.7	3.0	32.7
Boabeng Fiema	7.7	-6.9	-2.7	-18.6	16.4	19.7	18.3	19.0	13.9	-2.8	3.2
Kintampo	-50.3	7.5	-2.8	-1.6	51.7	23.3	62.2	34.0	-3.2	-18.8	-3.0
Tano Boase	64.1	-51.6	10.1	-36.5	1.3	1.7	1.6	3.9	18.5	21.7	14.2
Sirigu Sanctuary	14.9	34.3	-0.1	-48.8	2.4	4.3	2.4	1.5	4.9	-14.9	-3.4
Tongo Hills	25.6	7.3	-0.7	-31.9	1.1	1.8	2.0	1.3	17.8	-14.7	3.2
Paga	109.2	-30.8	-4.3	-34.1	3.8	8.6	5.6	3.5	16.0	-15.6	0.8
Pikworo Nania	-1.0	39.3	31.2	-56.3	0.6	2.4	4.5	3.6	49.7	-1.7	20.9
Wechiau Hippo	76.2	-2.2	-18.4	-32.5	1.5	2.6	1.9	1.8	22.0	-9.9	3.5
Total	**-13.5**	**0.7**	**-23.8**	**-27.5**	**100.0**	**100.0**	**100.0**	**100.0**	**8.2**	**-9.8**	**1.6**

Xavi Bird Watching and Canoe Tours

Arrivals to Xavi decreased from 300 in 2005 to just 21 in 2014, making this the site with the lowest visitor numbers in that year (Table 4.9 & Figure 4.10). The site showed an average annual growth rate of -29.5%. The share in arrivals was the lowest of all the selected sites, decreasing from 0.5% in 2005 to 0.03% in 2014 (Table 4.10).

Bobiri Forest and Butterfly Sanctuary

Visitor arrivals to Bobiri Forest and Butterfly Sanctuary increased from 200 in 2005 to 3,300 in 2014 (Table 4.9). The Sanctuary's share in visitor arrivals grew from 0.3% in 2005 to 4.5% in 2014, with an average annual growth rate of 32.7% (Table 4.10).

Boabeng-Fiema Monkey Sanctuary

In 2005 Boabeng-Fiema recorded 10,400 visitors, increasing to 13,900 visitors in 2014 (Table 4.9), a 33.6% increase, at an average annual rate of 3.2% (Table 4.10). Its share in arrivals increased from 16.4% in 2005 to 19.0% in 2014 (Table 4.10).

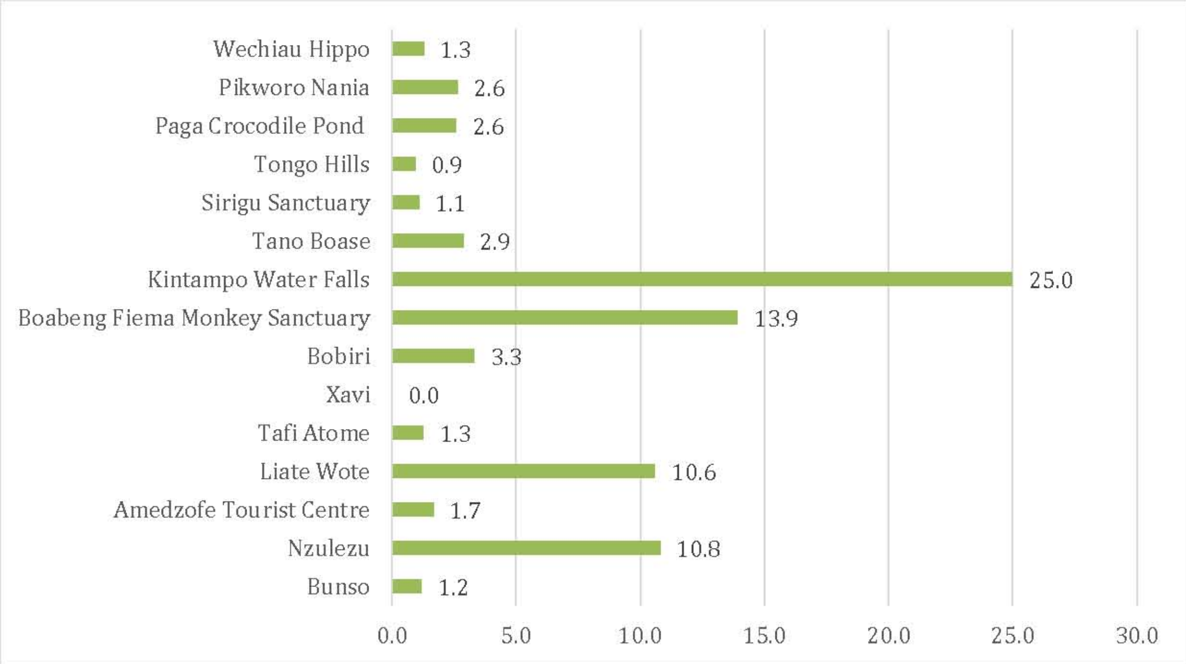
Kintampo Waterfalls

In 2005, there were 32,800 visitor arrivals recorded at Kintampo Waterfalls, but this number decreased to 25,000 in 2014 (Table 4.9), representing a decrease of 23.8%. Its market share decreased from 51.7% to 34.0% over the period and visitor arrivals to the Waterfall decreased at an average annual rate of 3% (Table 4.10). Despite this decrease, in 2014, Kintampo Waterfalls remained the site with the largest number of visitors (Figure 4.10).

Tano Boase Sacred Grove

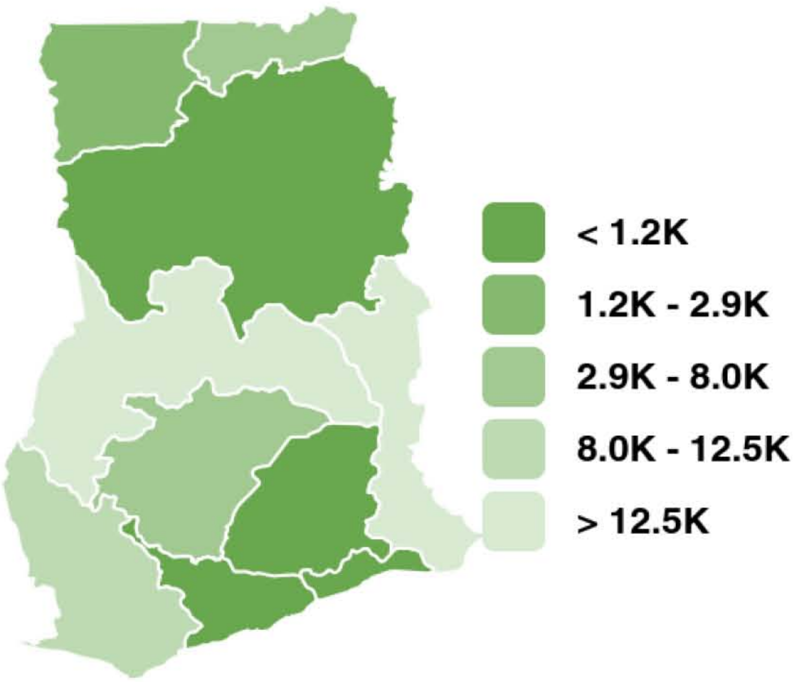
Tano Boase Sacred Grove recorded 800 visitor arrivals in 2005, rising to 2,900 in2014 (Table 4.9). The site's share in arrivals increased from 1.3% in 2005 to 3.9% in 2014 with arrivals recording an average annual growth rate of 14.2% between 2005 and 2014 (Table 4.10).

Figure 4.8: Visitor arrivals to selected community-based eco-tourism sites, 2014



The regions with higher numbers of visitors to community-based eco-tourism sites in 2014 were Brong Ahafo and Volta (Figure 4.8).

Figure 4.9: Map of visitor arrivals to selected community-based eco-



Sirigu Sanctuary

Sirigu Sanctuary registered 1,500 visitors in 2005, decreasing to 1,100 visitors in 2014 (Table 4.9).Its market share in arrivals decreased from 2.4% in 2005 to 1.5% in 2014 and over the period, visitor arrivals to the site declined at an average annual rate of 3.4% (Table 4.10).

Tongo Hills and Tengzug

In 2005, there were 700 visitor arrivals to Tongo Hills and Tugzeng, rising to 900 in 2014 (Table 4.9).Market share in arrivals increased from 1.1% in 2005 to 1.3% in 2014, and growth was at an average annual rate of 3.2% over the decade (Table 4.10).

Paga Crocodile Pond

Paga Crocodile Pond recorded 2,400 arrivals in 2005, rising to 2,600 in 2014 (Table 4.9).The Pond's share in visitor arrivals decreased from 3.8% in 2005 to 3.5% in 2014, arrivals growing at an average annual rate of 0.8% (Table 4.10).

Pikworo Nania

Visitor arrivals to Pikworo Nania increased from 400 in 2005 to 2,600 in 2014 (Table 4.9), and its market share increased substantially from 0.6% to 3.6% over the period (Table 4.10). Visitor arrivals to the site increased at an average rate of 20.9% a year, from 2005 to 2014 (Table 4.10).

Wechiau Hippo Sanctuary

Visitor arrivals to Wechiau Hippo Sanctuary increased from 900 in 2005 to 1,300 in 2014 (Table 4.9). The Sanctuary's market share increased from 1.5% to 1.8% over the period and visitor arrivals increased at an average rate of 3.5% a year, between 2005 and 2014 (Table 4.10).

5. ACCOMMODATION CAPACITY

5.1 Introduction

This chapter presents an overview of the characteristics and evolution of tourist accommodation capacity in Ghana. The term "tourist accommodation establishment" covers both collective and private tourist accommodation establishments. These establishments are categorized as follows: hotels (star-rated), guesthouses, budget hotels, hostels, beach hotels, and others providing limited accommodation facilities overnight.

Tourist hotels are approved and examined by Ghana Tourism Authority (GTA). These hotels are classified according to the internationally accepted star grading system, ranging from one star (lowest) to five stars (highest). The number of bed places is determined by the number of people who can stay overnight in beds in that establishment, ignoring any extra beds that may be added. The term 'bed place' applies to a single bed. A double bed is counted as two bed places.

Overall, the trend from 2005 to 2014 was generally upward, with an increase in the number of hotels every year except for 2012 when the figures show increase over the previous year. The number of rooms and bed-places declined only in 2007 but rose in every other year. Greater Accra region accounted for the most accommodation in the country and budget accommodation dominates the market nationwide. The average size of establishments has remained stable but the occupancy rate for 5, 4, 3, and 2 star hotels dropped over the period.

5.2 Accommodation Supply Situation in Ghana

Tables 5.1 & 5.2 summarize the supply of confirmed accommodation establishments, bedrooms and bed places in Ghana from 2005 to 2014.

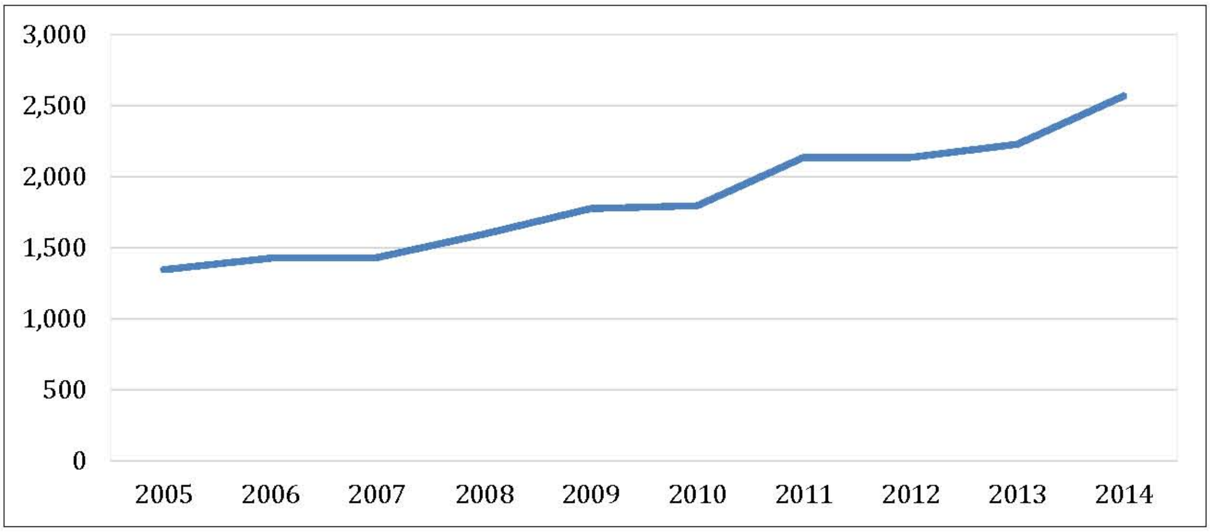
Table 5.1: Overview of accommodation supply in Ghana, 2005-2014

Year End	Number of Hotels & Similar Establishments	Number of Bedrooms	Number of Bed-places	Changes from Previous Year (Hotels & Similar Establishments)	Changes from Previous Year (Rooms)	Changes from Previous Year (Bed-places)	Average no. of Bed-places/ Establishment
2005	1,345	18,752	23,924	+30	+673	+386	18
2006	1,427	22,835	27,839	+82	+4,083	+3,915	20
2007	1,432	20,581	26,063	+5	-2,254	-1,776	18
2008	1,595	24,410	29,645	+163	+3,829	+3,582	19
2009	1,775	26,047	31,664	+180	+1,637	+2,019	18
2010	1,797	28,058	34,288	+22	+2,011	+2,624	19
2011	2,136	34,423	39,934	+339	+6,365	+5,646	19
2012	2,136	34,423	39,934	+0	+0	+0	19
2013	2,228	36,749	40,176	+92	+2,326	+242	18
2014	2,570	41,331	45,507	+342	+4,582	+5,331	18

Source: Ghana Tourism Authority

The total number of accommodation establishments recorded in 2005 was 1,345, which almost doubled to 2,570 in 2014, showing an increase of 91.1%, at an average annual rate of 7.2% during the period (Table 5.1 & 5.2 & Figure 5.1). From 2005 to 2009, the number of accommodation establishments increased at an average annual rate of 6.9%, while 2010–2014 recorded an average annual increase of 8.9% (Table 5.2).

Figure 5.1: Number of accommodation establishments, 2005-2014



The number of bedrooms increased from 18,752 in 2005 to 41,331 in 2014, showing an increase of 120.4%, and at an average annual rate of 8.8% over the period (Tables 5.1 & 5.2). Between 2005 and 2009, the number of bedrooms grew at an average annual rate of 8.2%, while from 2010 to 2014 the average yearly increase was 9.7% (Table 5.2).

The number of bed-places nearly doubled from 23,924 in 2005 to 45,507 in 2014, an increase of 90.2%, at an average annual rate of 7.1% (Tables 5.1 & 5.2 & Figure 5.2).From 2005 to 2009, the number of bed–places grew at an average annual rate of 7.0%, while between 2010 and 2014 the average annual growth rate was 7.1% (Table 5.2).

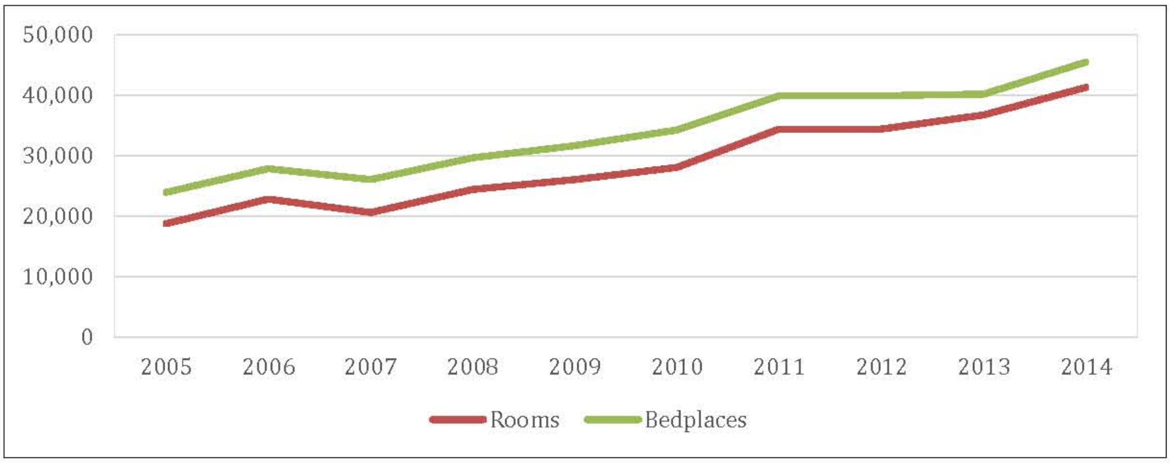
Table 5.2: Trends of accommodation supply, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
Year	2005 - 2014	2005-2009	2010-2014	2005-2014
Accommodation Establishments	1,225	6.9	8.9	7.2
Bedrooms	22,579	8.2	9.7	8.8
Bed places	21,583	7.0	7.1	7.1

Source: Ghana Tourism Authority

Figure 5.2 shows that from 2005 to 2014, the number of rooms and beds increased every year except for 2007.

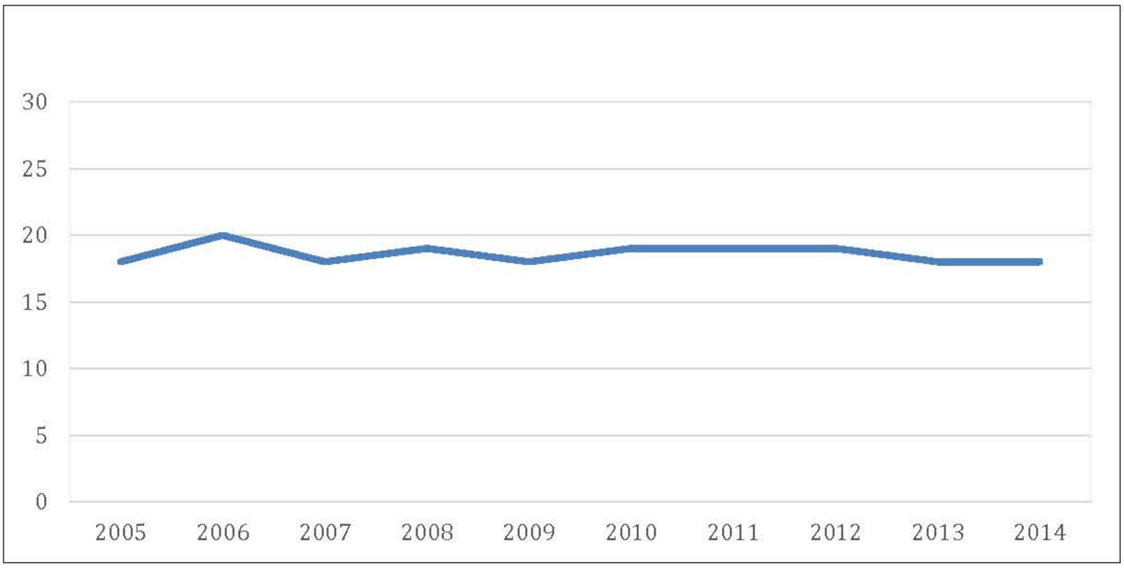
Figure 5.2: Number of rooms and bed places, 2005-2014



5.2.1 *Average Size of Accommodation Establishments*

The average size of accommodation establishments is the total number of bed-places divided by the total number of hotels and similar accommodation establishments in the country. From Table 5.1, it is observed that the average number of bed-places per establishment ranged from 18 to 20 over the period. Most of the establishments recorded average bed-places of 18 and 19 during the ten year period, except in 2006 when it reached an average of 20 bed-places per establishment (Figure 5.4). Thus the average size of accommodation establishments in the country has been relatively flat.

Figure 5.3: Average number of bed–places per accommodation establishment,



Source: Ghana Tourism Authority

5.3 Ghana's Accommodation Supply Structure

5.3.1 Regional distribution of Tourist Accommodation Establishments

Table 5.3 presents the distribution of accommodation establishments by region from 2005 to 2014. Greater Accra region accounted for the largest number of accommodation establishments in every year, followed by Ashanti region.

Table 5.3: Distribution of accommodation establishments by region, 2005– 2014

	Number of Establishments									
Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	94	103	101	111	127	158	184	184	185	216
Central	114	121	119	121	128	145	161	161	196	220
Greater Accra	536	608	606	737	750	759	860	860	789	927
Volta	66	70	69	76	54	76	88	88	107	128
Eastern	136	135	137	139	130	153	175	175	208	259
Ashanti	203	216	230	245	311	329	386	386	433	439
Brong Ahafo	104	80	79	68	89	41	112	112	130	161
Northern	42	46	46	51	67	75	86	86	85	100
Upper East	30	32	26	34	38	49	57	57	65	84
Upper West	20	16	19	13	81	12	27	27	30	36
Total	1,345	1,427	1,432	1,595	1,775	1,797	2,136	2,136	2,228	2,570

Table 5.4 indicates that across six (6) regions there was stronger growth in the number of accommodation establishments in the second half of the period than the first. Those regions that experienced the opposite trend were: Greater Accra, Ashanti, Northern and Upper West.

Table 5.4: Trends in growth of accommodation establishments by region, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
	2005 - 2014	2005-2009	2010-2014	2005-2014
Western	122	7.5	7.8	9.2
Central	106	2.9	10.4	7.3
Greater Accra	391	8.4	5.0	6.1
Volta	62	-5.0	13.0	7.4
Eastern	123	-1.1	13.2	7.2
Ashanti	236	10.7	7.2	8.6
Brong Ahafo	57	-3.9	34.2	4.9
Northern	58	11.7	7.2	9.6
Upper East	54	5.9	13.5	11.4
Upper West	16	35.0	27.5	6.5

Western region

In 2005, Western region recorded 94 accommodation establishments. The number increased more than two-fold to 216 establishments in 2014 (Table 5.3), an increase of 129.8%, and at an average annual growth rate of 9.2% (Table 5.4). The region's market share, as a proportion of the total number of accommodation establishments, was 7.0% in 2005, and increased to 8.4% in 2014 (Table 5.5 &Figures 5.4 & 5.5).

Central region

Central region recorded 114 accommodation establishments in 2005, whereas in 2014, the region recorded 220 accommodation establishments (Table 5.3), an increase of 92.8%, at an average annual growth rate of 7.3% during the period (Table 5.4).The region's market share increased marginally from 8.5% in 2005 to 8.6% in 2014 (Table 5.5 & Figures 5.4 & 5.5).

Greater Accra region

The highest provider of accommodation establishments in the country has been the Greater Accra region. In 2005, the region recorded 536 accommodation establishments, and in 2014, the number reached 927 (Table 5.3), an increase of 72.9%, at an average annual rate of 6.1% (Table 5.4). However, the region's market share decreased from 39.9% in 2005 to 36.1% in 2014 (Table 5.5 & Figures 5.4 & 5.5).

Volta region

In the Volta region, the number of accommodation establishments rose from 66 in 2005 to 128 in 2014 (Table 5.3), an increase of 93.9%, at an average annual growth rate of 7.4% (Table 5.4).The region's share in accommodation establishments increased marginally from 4.9% in 2005 to 5.0% in 2014 (Table 5.5 &Figures 5.4 & 5.5).

Eastern region

The number of accommodation establishments in the Eastern region increased from 136 in 2005 to 259 in 2014 (Table 5.3), an increase of 90.4%, at an average annual growth rate of 7.2% (Table 5.4).The region's market share was 10.1% in 2005, and remained the same in 2014 (Table 5.5 &Figures 5.4 & 5.5).

Ashanti region

Ashanti region provides the second highest number of accommodation establishments after Greater Accra across the 10-year period. The region recorded 203 accommodation establishments in 2005, rising to 439 in 2014 (Table 5.3), an increase of 116.3%, at an average annual growth rate of 8.6% (Table 5.4). The region's market share increased from 15.1% in 2005 to 17.1% in 2014 (Table 5.5 &Figures 5.4 & 5.5).

Table 5.5: Market share of accommodation establishments by region, 2005-2014

	Market Share (%)									
Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	7.0	7.2	7.1	7.0	7.2	8.8	8.6	8.6	8.3	8.4
Central	8.5	8.5	8.3	7.6	7.2	8.1	7.5	7.5	8.8	8.6
Greater Accra	39.9	42.6	42.3	46.2	42.3	42.2	40.3	40.3	35.4	36.1
Volta	4.9	4.9	4.8	4.8	3.0	4.2	4.1	4.1	4.8	5.0
Eastern	10.1	9.5	9.6	8.7	7.3	8.5	8.2	8.2	9.3	10.1
Ashanti	15.1	15.1	16.1	15.4	17.5	18.3	18.1	18.1	19.4	17.1
Brong Ahafo	7.7	5.6	5.5	4.3	5.0	2.3	5.2	5.2	5.8	6.3
Northern	3.1	3.2	3.2	3.2	3.8	4.2	4.0	4.0	3.8	3.9
Upper East	2.2	2.2	1.8	2.1	2.1	2.7	2.7	2.7	2.9	3.3
Upper West	1.5	1.1	1.3	0.8	4.6	0.7	1.3	1.3	1.3	1.4
Total	100	100	100	100	100	100	100	100	100	100

Source: Ghana Tourism Authority

Brong Ahafo region

The lowest rate of increase in accommodation establishments was in the Brong Ahafo region. In 2005 the region recorded 104 accommodation establishments and reached 161 in 2014 (Table 5.3), registering an increase of 54.8%, at an average annual growth rate of 4.9% (Table 5.4). The region's market share declined from 7.7% in 2005 to 6.3% in 2014 (Table 5.5 & Figures 5.4 & 5.5).

Northern region

Northern region recorded a steady increase in the supply of accommodation establishments from 2005 to 2014. In 2005, the region recorded 42 establishments, but this reached 100 in 2014 (Table 5.3), an increase of 138.1%, at an average annual growth rate of 9.6% (Table 5.4). The region's market share rose from 3.1% in 2005 to 3.9% in 2014 (Table 5.5 & Figures 5.4 & 5.5).

Upper East region

The highest rate of increase in accommodation establishments was in the Upper East region. The region recorded 30 accommodation establishments in 2005 increasing to 84 in 2014 (Table 5.3), an increase of 180%, at an average annual growth rate of 11.4% (Table 5.4). The region's market share increased from 2.2% in 2005 to 3.3% in 2014 (Table 5.5 & Figures 5.4 & 5.5).

Upper West region

Upper West region registered 20 accommodation establishments in 2005 rising to 36 in 2014 (Table 5.3) and at an annual average growth rate of 6.5% (Table 5.4). Its market share decreased from 1.5% in 2005 to 1.4% in 2014 (Table 5.5 & Figures 5.4& 5.5).

Figure 5.5: Market share of accommodation establishments by region, 2014

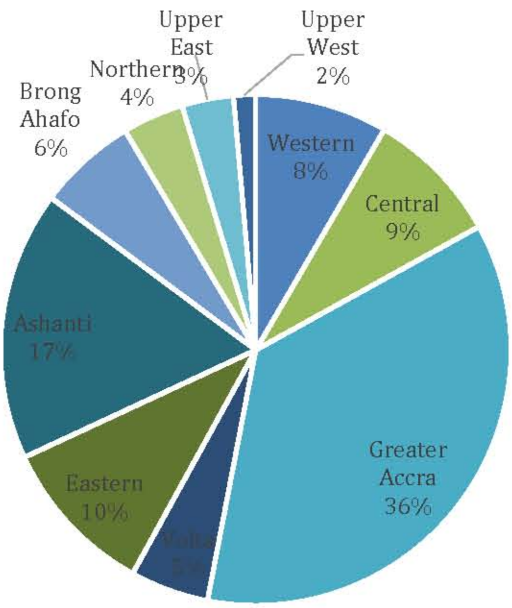
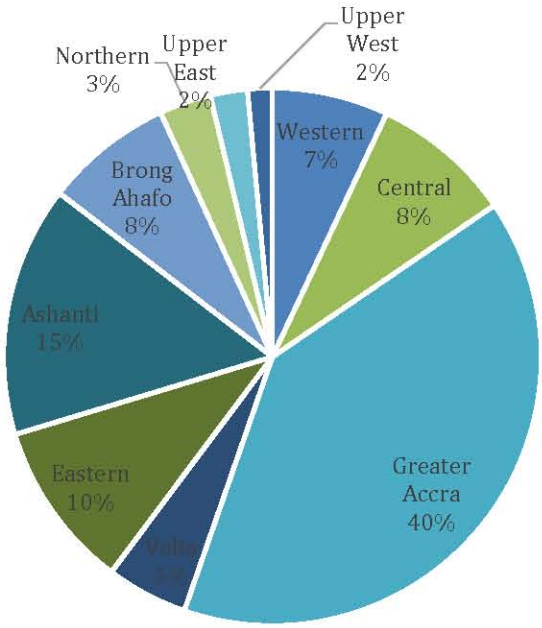


Figure 5.4: Market share of accommodation establishments by region, 2005



5.3.2 *Regional Distribution of Bedrooms*

Table 5.6 shows the distribution of bedrooms by region from 2005 to 2014. Overall, the trend for bedrooms across regions mirrors that of establishments, with Greater Accra providing the highest number of bedrooms followed by Ashanti across the 10 years.

Table 5.6: Distribution of bedrooms by region, 2005 – 2014

Region	Number of bed rooms									
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	1,422	1,594	1,648	1,842	2,131	2,638	2,920	2,920	3,167	3,932
Central	1,612	1,766	1,765	2,060	2,114	2,357	2,531	2,531	3,370	3,712
G. Accra	7,682	11,137	8,711	11,293	11,479	11,017	13,745	13,745	13,434	14,699
Volta	1,044	1,050	1,098	1,132	1,024	1,126	1,389	1,389	1,736	2,170
Eastern	1,660	1,746	1,736	1,901	1,993	2,298	2,594	2,594	3,275	4,304
Ashanti	2,917	3,109	3,433	3,877	4,336	5,215	7,374	7,374	7,215	6,986
Brong Ahafo	1,266	1,115	1,109	982	1,240	1,482	1,579	1,579	1,842	2,370
Northern	560	738	741	767	1,039	1,178	1,334	1,334	1,560	1,674
Upper East	306	326	54	329	404	562	640	640	731	937
U. West	283	254	286	227	287	185	317	317	419	547
Total	18,752	22,835	20,581	24,410	26,047	28,058	34,423	34,423	36,749	41,331

Majority of the regions showed stronger growth in the second half of the decade compared to the first. The exceptions include Western, Greater Accra, Ashanti, and Northern regions.

Table 5.7: Trends in growth of bedrooms by region, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
	2005 - 2014	2005-2009	2010-2014	2005-2014
Western	2510	10.1	10.0	11.3
Central	2100	6.8	11.4	9.3
Greater Accra	7017	10.0	7.2	7.2
Volta	1126	-0.5	16.4	8.1
Eastern	2644	4.6	15.7	10.6
Ashanti	4069	9.9	7.3	9.7
Brong Ahafo	1104	-0.5	11.7	7.0
Northern	1114	15.5	8.8	12.2
Upper East	631	6.9	12.8	12.4
Upper West	264	0.4	27.1	7.3

Western region

Western region recorded 1,422 bedrooms in 2005, increasing to 3,932 in 2014 (Table 5.6), an increase of 176.5%, at an average annual growth rate of 11.3% (Table 5.7). The region's market share of bedrooms increased from 7.6% in 2005 to 9.5% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Central region

In 2005, Central region recorded 1,612 bedrooms and by 2014, the number had more than doubled to 3,712 (Table 5.6), showing an increase of 130.3%, at an annual rate of 9.3% (Table 5.7).The region's market share increased from 8.6% in 2005 to 9.0% in 2014(Table 5.8 & Figures 5.6 & 5.7).

Greater Accra region

Greater Accra region recorded the highest number of bedrooms during the period. In 2005, the number of bedrooms was 7,682, reaching 14,699 in 2014 (Table 5.6), an increase of 91.3%, at an average annual rate of 7.2% (Table 5.7). The region's market share however, decreased from 41.0% in 2005 to 35.6% in 2014 (Table 5.8 &Figures 5.6 & 5.7).

Volta region

The number of bedrooms in the Volta region increased from 1,044 in 2005 to 2,170 in 2014 (Table 5.6), an increase of 107.9%, at an average annual rate of 8.1% (Table 5.7). The share of bedrooms in the Volta region decreased slightly from 5.6% in 2005 to 5.3% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Eastern region

Eastern region recorded 1,660 bedrooms in 2005, rising to 4,304 in 2014 (Table 5.6), an increase of 159.3%, at an average annual rate of 10.6% (Table 5.7). The region's market share increased from 8.9% in 2005 to 10.4% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Table 5.8: Market share of bedrooms by region, 2005-2014

	Market Share (%)									
Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	7.6	7.0	8.0	7.5	8.2	9.4	8.5	8.5	8.6	9.5
Central	8.6	7.7	8.6	8.4	8.1	8.4	7.4	7.4	9.2	9.0
G. Accra	41.0	48.8	42.3	46.3	44.1	39.3	39.9	39.9	36.6	35.6
Volta	5.6	4.6	5.3	4.6	3.9	4.0	4.0	4.0	4.7	5.3
Eastern	8.9	7.6	8.4	7.8	7.7	8.2	7.5	7.5	8.9	10.4
Ashanti	15.6	13.6	16.7	15.9	16.6	18.6	21.4	21.4	19.6	16.9
Brong Ahafo	6.8	4.9	5.4	4.0	4.8	5.3	4.6	4.6	5.0	5.7
Northern	3.0	3.2	3.6	3.1	4.0	4.2	3.9	3.9	4.2	4.1
Upper East	1.6	1.4	0.3	1.3	1.6	2.0	1.9	1.9	2.0	2.3
Upper West	1.5	1.1	1.4	0.9	1.1	0.7	0.9	0.9	1.1	1.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100	100.0	100.0	100.0

Ashanti region

The number of bedrooms in the Ashanti region increased from 2,917 in 2005 to 6,986 in 2014 (Table 5.6) registering an increase of 139.5%, at an average annual rate of 9.7% (Table 5.7). In 2005, the region recorded a market share of 15.6%, which rose to 16.9% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Brong Ahafo region

The lowest rate of increase in the number of bedrooms recorded was been in the Brong Ahafo region. The number of bedrooms in the region grew from 1,266 in 2005 to 2,370 in 2014 (Table 5.6), an increase of 87.2%, at an average annual rate of 7.0% (Table 5.7). The region's market share decreased from 6.8% in 2005 to 5.7% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Northern region

In the Northern region, the number of bedrooms grew steadily from 560 in 2005 to 1,674 in 2014 (Table 5.6), showing an increase of 198.9% during the period, at an average annual rate of 12.2% (Table 5.7). The region's market share increased from 3.0% in 2005 to 4.1% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Upper East region

Upper East region recorded the strongest growth over the 10-year period in terms of bedrooms. The region recorded 306 bedrooms in 2005 and this number increased three-fold to 937 in 2014 (Table 5.6), showing an increase of 206.2% during the period, at an average annual rate of 12.4% (Table 5.7). The region's market share increased from 1.6% in 2005 to 2.3% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Upper West region

The number of bedrooms in Upper West increased from 283 in 2005 to 547 in 2014 (Table 5.6) recording a 93.3% increase, at an average annual rate of 7.3% (Table 5.7). The region's share in bedrooms however, decreased from 1.5% in 2005 to 1.3% in 2014 (Table 5.8 & Figures 5.6 & 5.7).

Figure 5.6: Market share of bedrooms by region, 2005

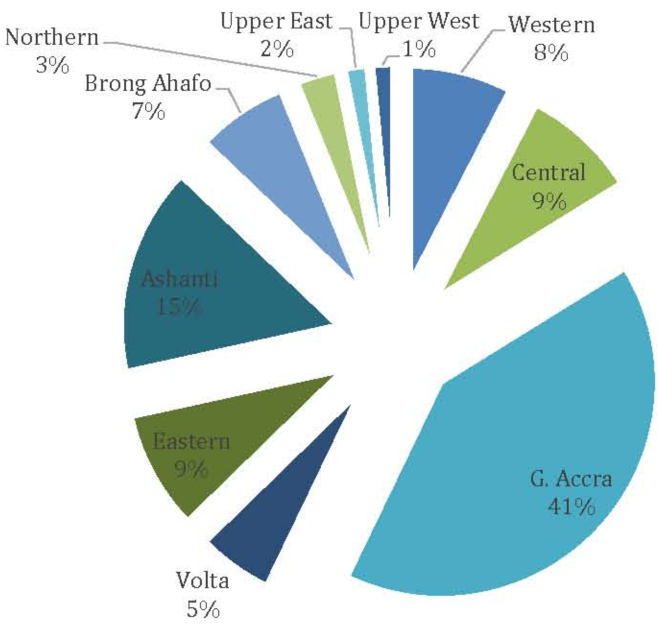
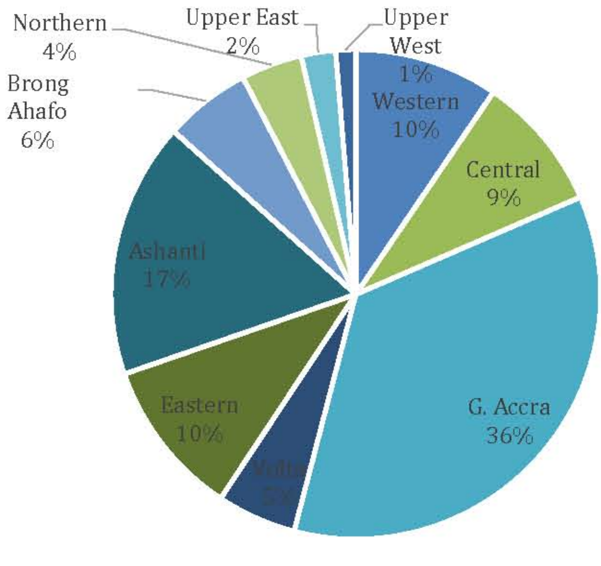


Figure 5.7: Market share of bedrooms by region, 2014



5.4 Regional Distribution of Bed-places

Table 5.9 reports on the regional distribution of bed-places from 2005 to 2014. Greater Accra recorded the highest number of bed-places followed by Ashanti across all ten regions.

Table 5.9: Distribution of bed-places by region, 2005-2014

	Number of bed-places									
Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	1,641	1,921	1,980	2,138	2,372	2,944	3,196	3,196	3,214	3,943
Central	2,197	2,242	2,215	2,425	2,664	2,975	3,095	3,095	3,698	4,268
Greater Accra	9,660	12,996	10,840	13,812	14,274	14,069	16,080	16,080	14,961	16,347
Volta	1,340	1,306	1,331	1,262	1,091	1,325	1,621	1,621	1,956	2,396
Eastern	2,107	2,255	2,297	2,404	2,318	2,594	2,901	2,901	3,397	4,817
Ashanti	3,973	4,031	4,303	4,671	5,279	6,093	8,498	8,498	8,029	7,633
Brong Ahafo	1,412	1,276	1,232	1,081	1,414	1,764	1,736	1,736	1,882	2,466
Northern	838	1,061	1,159	1,158	1,480	1,608	1,661	1,661	1,824	2,011
Upper East	402	432	356	409	485	686	794	794	766	1,019
Upper West	354	319	350	285	287	230	352	352	449	609
Total	23,924	27,839	26,063	29,645	31,664	34,288	39,934	39,934	40,176	45,509

Western, Greater Accra, Ashanti, and Northern regions once again recorded lower growth rates in the second half of the period while the other regions showed the opposite trend.

Table 5.10: Trends in growth of bed-places by region, 2005-2014

	Increase between	Average Annual Growth Rate (%)		
	2005 - 2014	2005-2009	2010-2014	2005-2014
Western	2302	9.2	7.3	9.7
Central	2071	4.8	9.0	7.4
Greater Accra	6687	9.8	3.8	5.8
Volta	1056	-5.1	14.8	6.5
Eastern	2710	2.4	15.5	9.2
Ashanti	3660	7.1	5.6	7.3
Brong Ahafo	1054	0.0	8.4	6.2
Northern	1173	14.2	5.6	9.7
Upper East	617	4.7	9.9	10.3
Upper West	255	-5.2	24.3	6.0

Western region

The number of bed-places in the region increased from 1,641 in 2005 to 3,943 in 2014 (Table 5.9), an increase of 140.3%, at an average annual rate of 9.7% (Table 5.10). The region's market share of the total bed-places, increased from 6.9% in 2005 to 8.7% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Central region

In 2005, Central region recorded 2,197 bed-places, and this number reached 4,268 in 2014 (Table 5.9) recording a 94.3% increase, at an average annual growth rate of 7.4% (Table 5.10).The region's market share of bed-places increased marginally from 9.2% in 2005 to 9.4% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Greater Accra region

The largest increase in accommodation capacity in terms of bed-places was in the Greater Accra region with an additional capacity of 6,687 bed-places between 2005 and 2014 (Table 5.10). The region recorded the highest number of bed-places across the 10 regions, with 16,347 bed-places in 2014, up from 9,660 in 2005 (Table 5.9). This resulted in an increase of 69.2%, at an annual rate of 5.8%, which was the lowest overall growth rate amongst the 10 regions (Table 5.10). The region's market share also declined from 40.4% in 2005 to 35.9% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Volta region

Volta region registered 1,340 bed-places in 2005 and the number reached 2,396 in 2014 (Table 5.9), an increase of 78.8%, at an average annual rate of 6.5% (Table 5.10).The region's share in bed-places decreased from 5.6% in 2005 to 5.3% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Eastern region

In the Eastern region, the number of bed-places more than doubled from 2,107 in 2005 to 4,817 in 2014 (Table 5.9) registering a 128.6% increase, at an annual growth rate of 9.2% (Table 5.10).The region's market share increased from 8.8% in 2005 to 10.6% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Table 5.11: Market share of bed-places by region, 2005-2014

Region	Market Share (%)									
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Western	6.9	6.9	7.6	7.2	7.5	8.6	8.0	8.0	8.0	8.7
Central	9.2	8.1	8.5	8.2	8.4	8.7	7.8	7.8	9.2	9.4
Greater Accra	40.4	46.7	41.6	46.6	45.1	41.0	40.3	40.3	37.2	35.9
Volta	5.6	4.7	5.1	4.3	3.4	3.9	4.1	4.1	4.9	5.3
Eastern	8.8	8.1	8.8	8.1	7.3	7.6	7.3	7.3	8.5	10.6
Ashanti	16.6	14.5	16.5	15.8	16.7	17.8	21.3	21.3	20.0	16.8
Brong Ahafo	5.9	4.6	4.7	3.6	4.5	5.1	4.3	4.3	4.7	5.4
Northern	3.5	3.8	4.4	3.9	4.7	4.7	4.2	4.2	4.5	4.4
Upper East	1.7	1.6	1.4	1.4	1.5	2.0	2.0	2.0	1.9	2.2
Upper West	1.5	1.1	1.3	1.0	0.9	0.7	0.9	0.9	1.1	1.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100	100.0	100.0	100.0

Ashanti region

The number of bed-places in Ashanti region increased from 3,973 in 2005 to 7,633 in 2014 (Table 5.9), showing an increase of 92.1%, at an average annual growth rate of 7.3% (Table 5.10). The region's market share increased marginally from 16.6% in 2005 to 16.8% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Brong Ahafo region

Brong Ahafo region recorded 1,412 bed-places in 2005, increasing to 2,466 in 2014, showing an increase of 74.6% at an average annual growth rate of 6.2% (Table 5.10). However, the region's market share declined from 5.9% in 2005 to 5.4% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Northern region

In the Northern region, the number of bed-places increased from 838 in 2005 to 2,011 in 2014 (Table 5.9), an increase of 140%, at an average annual growth rate of 9.7% (Table 5.10). The region's market share increased from 3.5% in 2005 to 4.4% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Upper East region

The highest average annual rate of increase (10.3%) in the number of bed-places was recorded in the Upper East region (Table 5.10). The region recorded 402 bed-places in 2005, rising to 1,019 in 2014 (Table 5.9), an increase of 153.5%. The region's market share rose from 1.7% in 2005 to 2.2% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

Upper West region

In the Upper West region, 354 bed-places were recorded in 2005, rising to 609 in 2014 (Table 5.9), at an average annual growth rate of 6% (Table 5.10). Its market share declined from 1.5% in 2005 to 1.3% in 2014 (Table 5.11 & Figures 5.8 & 5.9).

5.5 Categories of Accommodation Establishments

Accommodation establishments are classified according to the establishment size, location, target markets, levels of service, facilities provided, number of rooms, ownership, affiliation, average room rate, renovations, other hotel establishments in the surrounding area, etc.

The categories are determined annually as a regular part of the Ghana Tourism Authority's overall evaluation programme. The categories of establishments are: 5-Star, 4-Star, 3-Star, 2-Star, 1-Star, Budget hotel, Guesthouse, and Other.

Overall, the budget hotel category accounted for the largest proportion of the market as well as recording the most substantial growth from 2005 to 2014.

Figure 5.8: Market share of bed-places by region, 2014

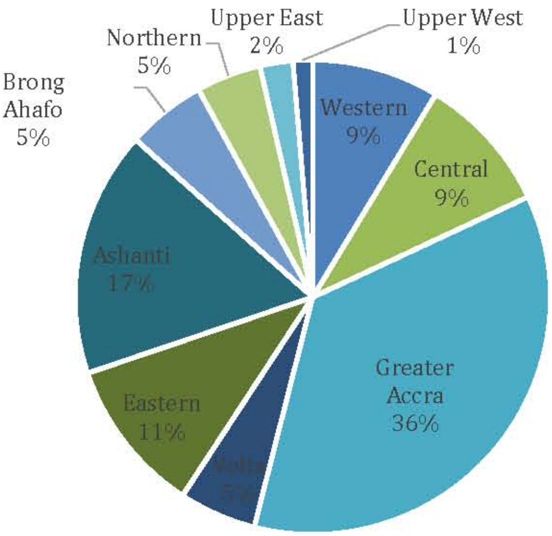
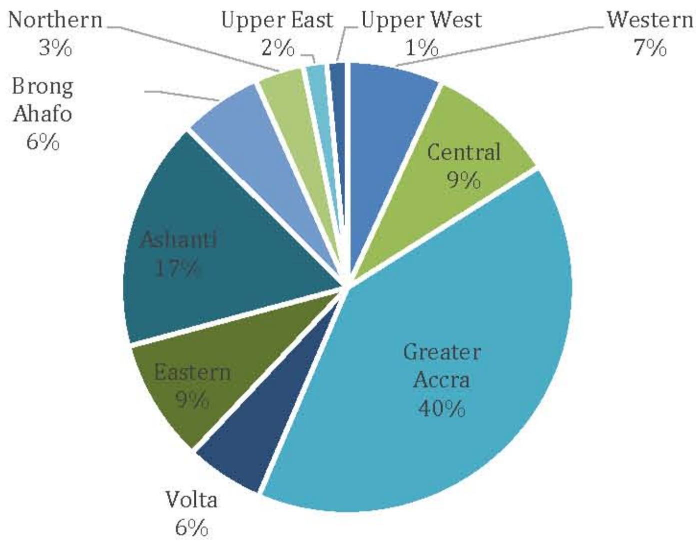


Figure 5.9: Market share of bed-places by region, 2005



5.5.1 Distribution of Accommodation Establishments by Category

Table 5.12 presents the classification of the number of accommodation establishments between 2005 and 2014. The number of 5 & 4-star hotels recorded in 2005 was just 5 but this reached 9 in 2014. The number of 3-star hotels increased from 28 in 2005 to 36 in 2014, while 2-star hotels increased from 137 to 214 over the same period (Table 5.12). The budget hotel category, which represents the majority of hotels in the country, showed the greatest expansion, more than doubling from 837 in 2005 to 1,804 in 2014. This category represented 70% of the accommodation establishments in the country in 2014 (Table 5.13 & Figures 5.10 & 5.11). Other categories of accommodation establishments (hostels and home lodges) increased from

4 in 2005 to 87 in 2009 before decreasing to 67 in 2010. Data for this category is missing for 2011 to 2014 (Table 5.12).

Table 5.12: Distribution of accommodation establishments by category, 2005–2014

	Accommodation Establishment									
Establishment Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	5	5	5	5	6	6	7	7	7	9
3 Star	28	30	20	26	17	23	27	27	34	36
2 Star	137	138	133	149	165	163	185	185	200	214
1 Star	154	169	154	188	184	225	278	278	290	351
Guest House	171	194	129	120	181	137	157	157	147	156
Budget	837	867	963	1054	1,135	1,176	1,482	1,482	1,550	1804
Other	4	24	28	53	87	67	-	-	-	-
Total	1336	1427	1432	1595	1775	1797	2136	2136	2228	2570

Source: Ghana Tourism Authority
Note: Other refers to hostels and home lodgers.

Table 5.13 and Figures 5.10 and 5.11 show trends in market share. Accommodation establishments classified as 5 & 4-star hotels held a share of 0.4% in 2005, but this decreased to 0.3% from 2006 to 2013, before increasing to 0.4% in 2014 (Table 5.13 & Figures 5.10 & 5.11). Three-star hotels recorded a 2.1% market share in 2005, decreasing to 1.4% in 2014. The market share of the 2-star hotel category in 2005 was 10.3%, but this declined to 8.3% in 2014 the share of guesthouses also declined considerably from 12.8% in 2005 to 6.1% in 2014 (Table 5.13 & Figures 5.10 & 5.11). However, the share of budget hotels increased from 62.6% in 2005 to 70.2% in 2014 (Table 5.13 & Figures 5.10 & 5.11).

Table 5.13: Market share of accommodation establishments by category, 2005-2014

Establishment	Market Share (%)									
Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4
3 Star	2.1	2.1	1.4	1.6	1.0	1.3	1.3	1.3	1.5	1.4
2 Star	10.3	9.7	9.3	9.3	9.3	9.1	8.7	8.7	9.0	8.3
1 Star	11.5	11.8	10.8	11.8	10.4	12.5	13.0	13.0	13.0	13.7
Guest House	12.8	13.6	9.0	7.5	10.2	7.6	7.4	7.4	6.6	6.1
Budget	62.6	60.8	67.2	66.1	63.9	65.4	69.4	69.4	69.6	70.2
Other	0.3	1.7	2.0	3.3	4.9	3.7				
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Figure 5.11: Market share of accommodation establishments by category, 2005

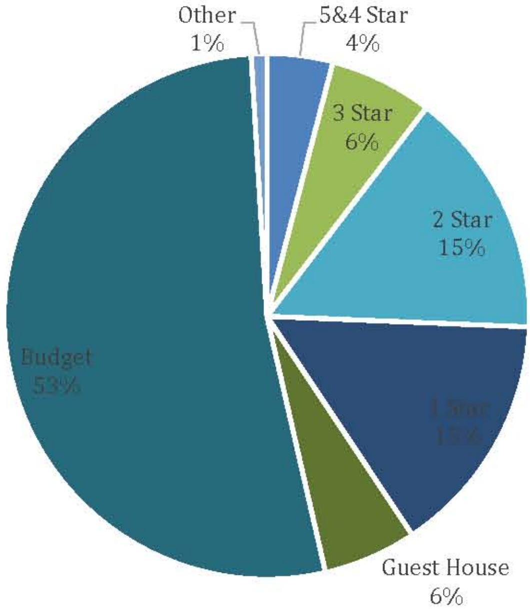
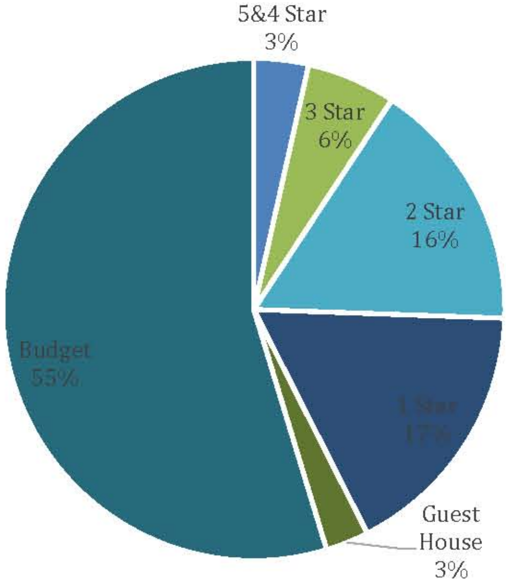


Figure 5.10: Market share of accommodation establishments by category, 2014



5.3.3 Distribution of Bedrooms by Category of Accommodation Establishments

Tables 5.14 & 5.15 present the distribution and market share of bedrooms by accommodation category from 2005 to 2014.

The number of bedrooms in 5 & 4-star hotels increased from 762 in 2005 to 1,452 in 2014 (Table 5.14). However, the market share of this category of hotels reduced from 4.1% in 2005 to 3.5% in 2014 (Table 5.15 & Figures 5.12 & 5.13).

Bedrooms in the 3-star hotel category increased from 1,191 in 2005 to 2,379 in 2014 (Table 5.14). This category's market share decreased slightly from 6.3% in 2005 to 5.8% in 2014 (Table 5.15 & Figures 5.12 & 5.13).

For the 2-star hotel category, the number of bedrooms rose from 2,862 in 2005 to 6,731 in 2014 (Table 5.14), with an increase in market share from 15.2% to 16.3% (Table 5.15 & Figures 5.12 & 5.13).

Budget hotels showed the biggest expansion, recording for 9,881 bedrooms in 2005, which increased to 22,604 in 2014 (Table 5.14). This category's market share increased from 52.6% in 2005 to 54.7% in 2014 (Table 5.15 & Figures 5.12 & 5.13).

Table 5.14: Distribution of bedrooms by category, 2005 - 2014

	Number of bedrooms									
Establishment Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	762	762	780	776	947	860	1,055	1,055	1,255	1,452
3 Star	1,191	1,264	905	1,373	1,047	1,477	1,740	1,740	2,574	2,379
2 Star	2,862	2,996	3,311	3,903	4,741	4,676	5,298	5,298	5,987	6,731
1 Star	2,817	3,028	2,742	3,355	3,340	4,082	5,309	5,309	5,762	7,017
Guest House	1,082	1,260	842	793	705	975	2,972	2,972	1,103	1,148
Budget	9,881	13,296	11,796	13,873	14,527	15,000	18,049	18,049	20,068	22,604
Other	180	229	213	337	740	988	-	-	-	-
Total	18,775	22,835	20,589	24,410	26,047	28,058	34,423	34,423	36,749	41331

Source: Ghana Tourism Authority

Table 5.15: Market share of bedrooms by category, 2005-2014

	Market Share (%)									
Establishment Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	4.1	3.3	3.8	3.2	3.6	3.1	3.1	3.1	3.4	3.5
3 Star	6.3	5.5	4.4	5.6	4.0	5.3	5.1	5.1	7.0	5.8
2 Star	15.2	13.1	16.1	16.0	18.2	16.7	15.4	15.4	16.3	16.3
1 Star	15.0	13.3	13.3	13.7	12.8	14.5	15.4	15.4	15.7	17.0
Guest House	5.8	5.5	4.1	3.2	2.7	3.5	8.6	8.6	3.0	2.8
Budget	52.6	58.2	57.3	56.8	55.8	53.5	52.4	52.4	54.6	54.7
Other	1.0	1.0	1.0	1.4	2.8	3.5				
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Ghana Tourism Authority

Note: Other refers to hostels and home lodger

Figure 5.13: Market share of bedrooms by category, 2005

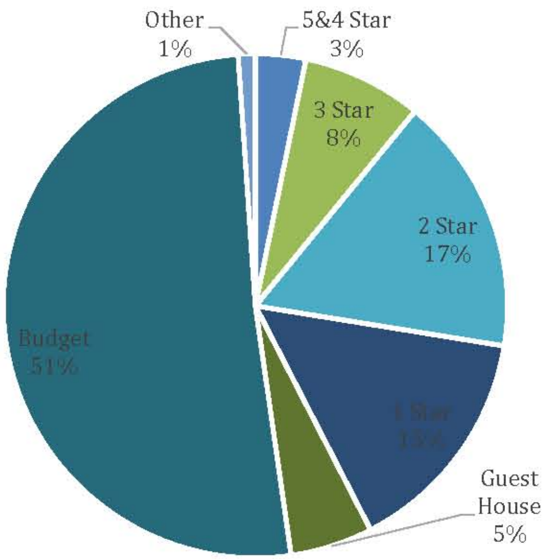
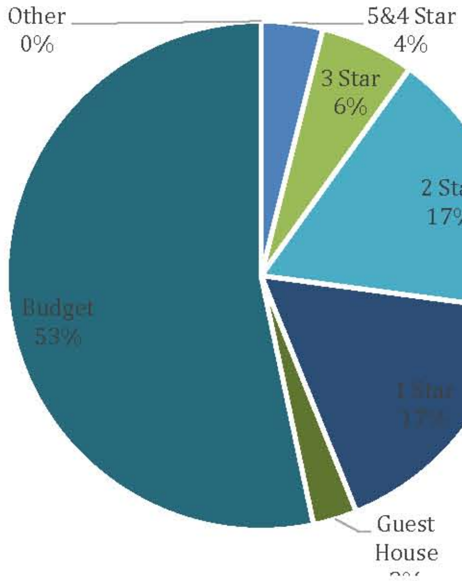


Figure 5.12: Market share of bedrooms by category, 2014



5.3.4 *Distribution of Bed-places by Category of Accommodation Establishments*

Table 5.16 shows the distribution of bed-places by accommodation category from 2005 to 2014. The category of 5 & 4-star hotels recorded 768 bed-places in 2005 and this increased to 1,764 in 2014 (Table 5.16). The share in bed-places accounted for by this category increased from 3.2% in 2005 to 3.9% in 2014 (Table 5.17 & Figures 5.14 & 5.15).

The number of bed-places in 3-star hotels increased steadily from 1,836 in 2005 to 2,746 in 2014 (Table 5.16). However, this category's market share decreased substantially from 7.7% in 2005 to 6.0% in 2014 (Table 5.17 & Figures 5.14 & 5.15).

Bed-places in budget hotels nearly doubled from 12,194 in 2005 to 24,270 in 2014. Budget hotels' market share increased from 51.2% in 2005 to 53.3% in 2014 (Table 5.17 & Figures 5.14 & 5.15).

Table 5.16: Distribution of bed-places by accommodation category, 2005 – 2014

	Bed-places by Accommodation Category									
Establishment Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	768	768	1,137	1,133	1,270	951	1,206	1,206	1,581	1,764
3 Star	1,836	1,866	1,151	1,827	1,326	1,835	2,179	2,179	2,984	2,746
2 Star	3,959	4,030	4,563	4,973	5,305	5,809	6,479	6,479	6,826	7,819
1 Star	3,549	3,891	3,510	3,988	4,201	4,949	6,292	6,292	6,388	7,652
Guest House	1,261	1,469	964	938	856	1,108	3,394	3,394	1,175	1,256
Budget	12,194	15,326	14,276	16,062	17,308	17,671	20,384	20,384	21,222	24,270
Other	261	489	462	724	1,398	1,965	-	-	-	-
Total	23828	27839	26063	29645	31664	34288	39934	39934	40176	45507

Source: Ghana Tourism Authority

Table 5.17: Market share of bed-place by accommodation category, 2005-2014

	Market Share (%)									
Establishment Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5&4 Star	3.2	2.8	4.4	3.8	4.0	2.8	3.0	3.0	3.9	3.9
3 Star	7.7	6.7	4.4	6.2	4.2	5.4	5.5	5.5	7.4	6.0
2 Star	16.6	14.5	17.5	16.8	16.8	16.9	16.2	16.2	17.0	17.2
1 Star	14.9	14.0	13.5	13.5	13.3	14.4	15.8	15.8	15.9	16.8
Guest House	5.3	5.3	3.7	3.2	2.7	3.2	8.5	8.5	2.9	2.8
Budget	51.2	55.1	54.8	54.2	54.7	51.5	51.0	51.0	52.8	53.3
Other	1.1	1.8	1.8	2.4	4.4	5.7	-	-	-	-
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Ghana Tourism Authority

Figure 5.15: Market share of bed-places by category, 2014

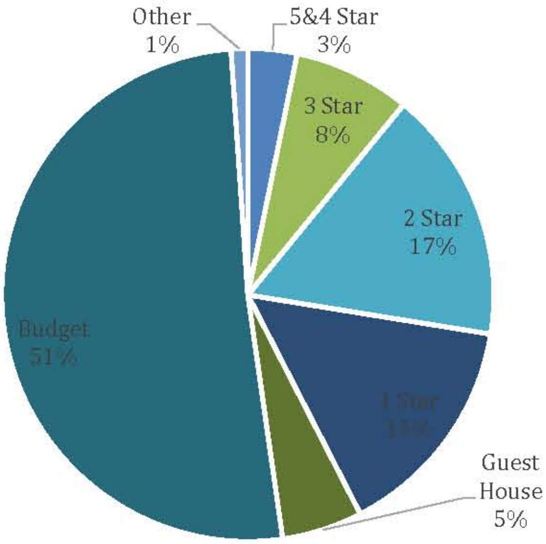
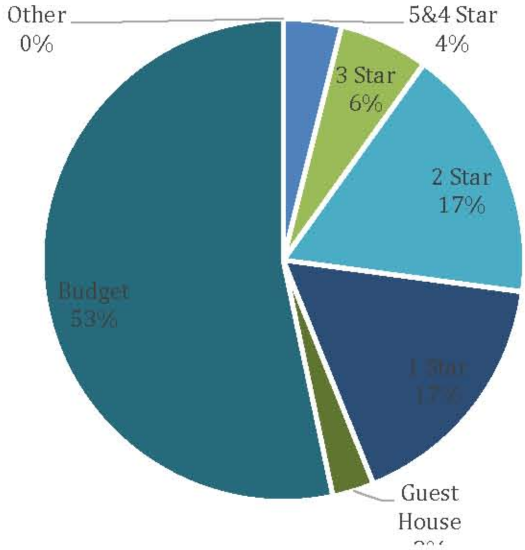


Figure 5.14: Market share of bed-places by category, 2005



5.4 Room Occupancy Rate in Hotels (%)

The room occupancy rate is the ratio of the number of occupied rooms to the number of rooms offered by the hotels that are open.

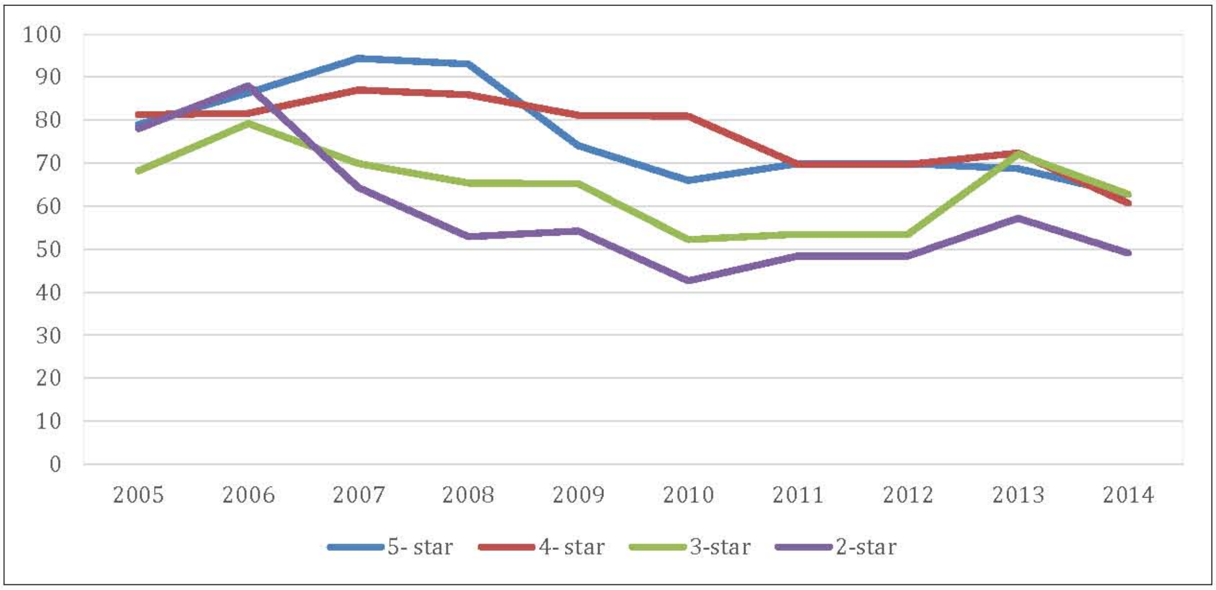
Table 5.18 reports on the room occupancy rate of 5-star, 4-star, 3-star and 2-star hotels in the country for the period, 2005-2014. From the Table and Figure 5.16 it is clear that there has been a general decline in room occupancy rates across 5, 4, 3 and 2 star hotels in the country.

Table 5.18: Hotel room occupancy rate (%), 2005-2014

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
5-star	79.0	86.3	94.4	93.0	74.1	66.0	69.9	69.9	68.7	62.7
4-star	81.3	81.6	87.0	85.9	81.1	80.9	69.7	69.7	72.4	60.7
3-star	68.2	79.2	69.9	65.4	65.2	52.2	53.5	53.5	72.1	62.8
2-star	78.0	88.0	64.3	52.9	54.2	42.6	48.4	48.4	57.2	49.1

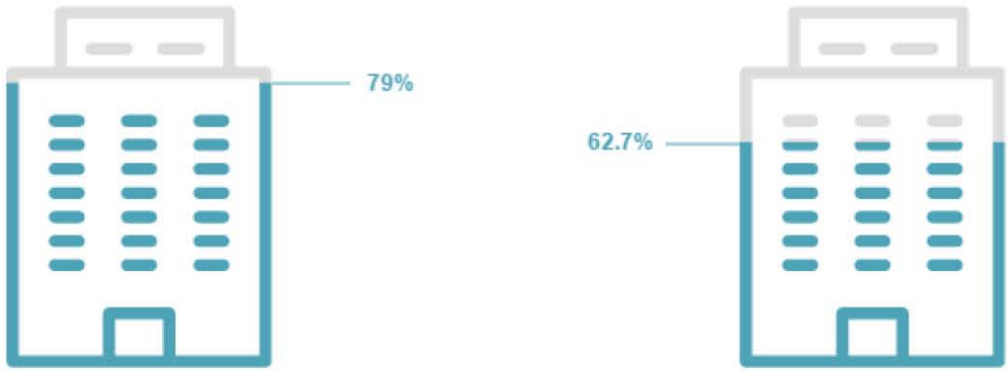
Source: Ghana Tourism Authority

Figure 5.16: Occupancy rate for hotels, 2005-2014



The occupancy rate for 5-star hotels in 2005 was 79%, peaking in 2007 at 94.4%, showing an 8.1% increase over the 2006 rate (Table 5.18). However, in 2008 and 2009, the 5-star hotel category recorded a decline in occupancy, reaching only 93% and 74.1% respectively. The decline continued until it registered 62.7% in 2014 (Table 5.18 & Figures 5.16 & 5.17).

Figure 5.17: Occupancy rate for 5-star hotels, 2005 & 2014



For the 4-star category, the occupancy rate recorded in 2005 was 81.3%, rising to 87% in 2007 (Table 5.18 & Figures 5.16 & 5.18). In 2008, the rate reduced to 85.9%, before further reducing to 81.1% in 2009, and finally to 60.7% in 2014 (Table 5.18 & Figure 5.18).

Figure 5.18: Occupancy rate for 4-star hotels, 2005 & 2014

Room occupancy in the 3-star category declined from 68.2% in 2005 to 62.8% in 2014 (Table 5.18 & Figure s5.16 & 5.19).

Figure 5.19: Occupancy rate for 3-star hotels, 2005 & 2014

The 2-star category of hotels recorded 78% occupancy rate in 2005 (Table 5.18 & Figures 5.16 & 5.20). The occupancy rate in 2006 was higher than the other three categories, recording 88% (Table 5.18 & Figure 5.16). However, between 2007 and 2014, the level of utilization of 2-star hotels reduced from 64.3% to 42.6% in 2010, increased to 57.2% in 2013 but declined to 49.1% in 2014 (Table 5.18 & Figure 5.17 & 5.21).

Figure 5.20: Occupancy rate for 3-star hotels, 2005 & 2014

In all 4 categories, the utilization of the country's star-rated hotels reduced significantly between 2005 and 2014.

6. TOURISM SUPPLY ESTABLISHMENTS

6.1 Introduction

Tourism supply establishments are establishments that provide goods or services to tourists or visitors including food and beverages servicing activities, passenger transportation, travel agencies and other reservation services activities, cultural activities, sports and recreational activities, as well as other country-specific activities (UNWTO, 2010). They include:

- Car hire establishments that provide transportation services over predetermined routes on a predetermined schedule;
- Tour operator establishments which organize and arrange packaged tours that usually include accommodation and sightseeing arrangements; etc.
- Travel agencies engaged in the sale of travel tickets, lodging and packaged tours in return for a fee;
- Travel and tours establishments that provide the services of both tour operators and travel agencies.

Licensed restaurants engage in the sale of food and beverages to final consumers who are visitors/ tourists or local consumers. They are categorized as follows:

- Grade 3 establishments provide full service consisting of waited service to individual customers seated at tables with or without entertainment;
- Grade 2 establishments are facilities providing seating but not waiter service i.e. meal services in self-service establishments; and
- Grade 1 establishments provide no seating or waiter services.

The data below are those provided by the Ghana Tourism Authority on registered establishments. There may be additional establishments operating throughout the country which are not registered.

During the period 2005 and 2014, the number of travel and tour agencies, and travel agencies decreased while the number of tour operators increased marginally; car rentals showed strong growth particularly in the early part of the decade.

The number of restaurants and nightclubs also increased over the period. Of all 3 grades of restaurant, only grade 2 increased in number between 2005 and 2014; grades 1 and 3 saw falls in their number over the period. Nightclubs did experience some positive growth but their number remained relatively flat, gaining only 9 in the entire period.

6.2 Travel and Tours, Travel Agencies, Tour Operators and Car rental Establishments

Table 6.1 depicts the number of travel & tours, travel agencies, tour operators, and car rental establishments from 2005 to 2014. The number of travel and tours establishments decreased from 211 in 2005 to 200 in 2014 (Table 6.1 & Figure 6.1).Similarly, the number of licensed travel agencies declined from 96 in 2005 to 42 in 2014, while the number of tour operators rose from 42 to 45. Licensed car rental companies also increased from 53 in 2005 to 85 in 2014.

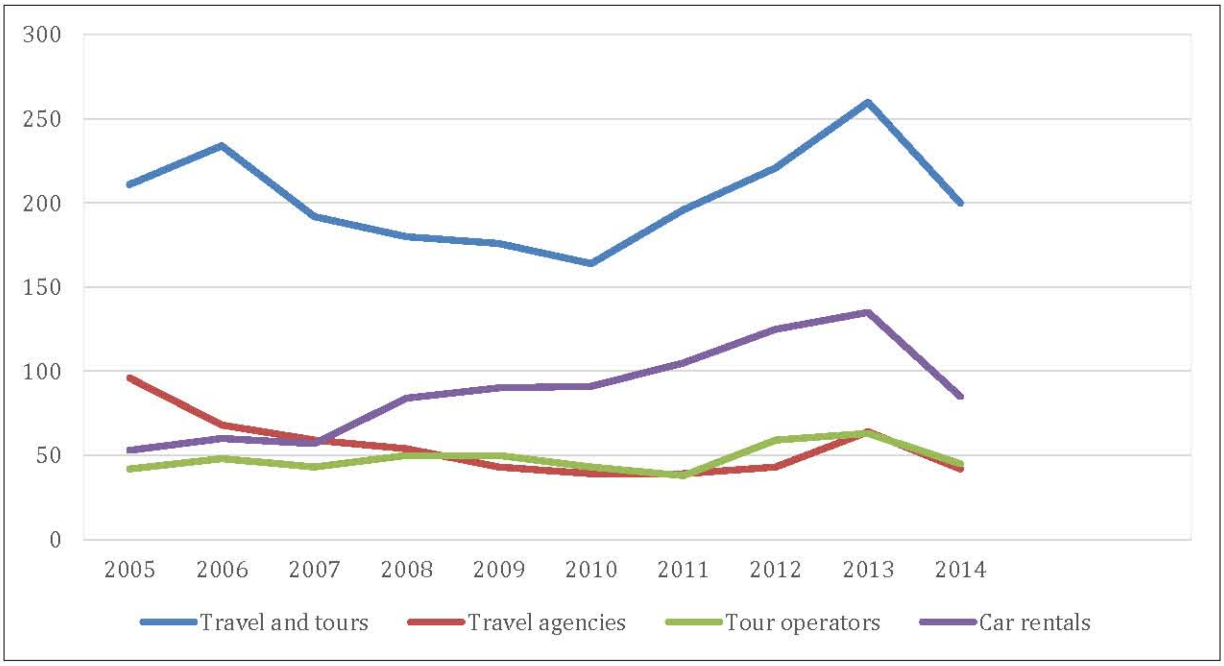
(Table 6.1). All categories showed a year-on-year decline in 2014 over the 2013 figures (Table 6.1).

Table 6.1: Numbers of travel & tours and car rental establishments and % annual change, 2005– 2014

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Travel and tours	211	234	192	180	176	164	196	221	260	200
% annual change		10.9	-17.9	-6.3	-2.2	-6.8	19.5	12.8	17.6	-23.1
Travel agencies	96	68	59	54	43	39	39	43	64	42
% annual change		-29.2	-13.2	-8.5	-20.4	-9.3	0.0	10.3	48.8	-34.4
Tour operators	42	48	43	50	50	43	38	59	63	45
% annual change		14.3	-10.4	16.3	0.0	-14.0	-11.6	55.3	6.8	-28.6
Car rentals	53	60	57	84	90	91	105	125	135	85
% annual change		13.2	-5.0	47.4	7.1	1.1	15.4	19.0	8.0	-37.0

Source: Ghana Tourism Authority

Figure 6.1: Numbers of travel and tours, travel agencies, tour operators and car rental establishments, 2005-2014



Source: Ghana Tourism Authority

For the ten-year period, the number of travel & tours establishments declined at an average annual rate of 0.6%. The number decreased at an average annual rate of 4.5% from 2005–2009, while from 2010–2014, the number increased at a rate of 5% per annum (Table 6.2).

Similarly, the number of travel agencies declined at an average annual rate of 9.2% between 2005 and 2014. The number decreased at a rate of 20.1% per year from 2005 to 2009, while from 2010 to 2014, the number grew at 1.9% per year (Table 6.2).

Tour operators was the only category that showed positive growth in both halves of the period with an overall annual average growth rate of 0.8% over the 10 years (Table 6.2).

Licensed car rentals registered an average annual increase of 13.2% from 2005 to 2009, while from 2010 to 2014, the number decreased at an average rate of 1.7% per year (Table 6.2.).

Table 6.2: Trends in growth of travel and tours, travel agencies, operators and car rental establishments, 2005-2014

		Average Annual Growth Rate (%)		
Category	Increase or decrease between 2005 & 2014	2005-2009	2010-2014	2005-2014
Travel & Tours	-11	-4.5	5.0	-0.6
Travel Agencies	-54	-20.1	1.9	-9.2
Tour Operators	3	4.4	1.1	0.8
Car Rental Establishments	32	13.2	-1.7	5.2

Source: Ghana Tourism Authority

6.3 Licensed Restaurants and nightclubs

Table 6.3 shows the number of licensed restaurants and nightclubs in the country, 2005-2014.

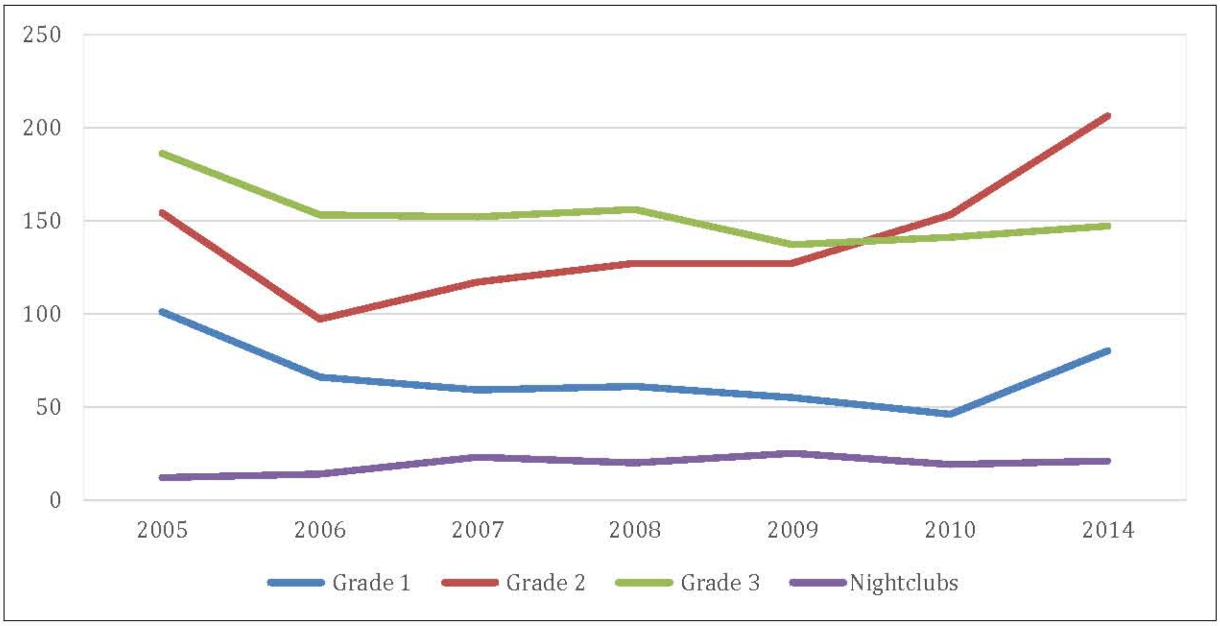
Table 6.3: Number of licensed restaurants and night clubs, 2005-2014

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Grade 1	101	66	59	61	55	46	-	-	-	80
% annual change		-34.7	-10.6	3.4	-9.8	-16.4				
Grade 2	154	97	117	127	127	153	-	-	-	206
% annual change		-37.0	20.6	8.5	0.0	20.5	-	-	-	
Grade 3	186	153	152	156	137	141	-	-	-	147
% annual change		-17.7	-0.7	2.6	-12.2	2.9	-	-	-	
Total restaurants	372	316	351	365	344	359	-	-	346	433
% annual change		-15.1	11.1	4.0	-5.8	4.4	-	-	-	
Nightclubs	12	14	23	20	25	19	-	-	13	21
% annual change		16.7	64.3	-13.0	25.0	-24.0	-	-	-	

Source: Ghana Tourism Authority

The total number of restaurants increased from 372 in 2005 to 433 in 2014 (Table 6.3 & Figure 6.2). The number of Grade 1 establishments decreased from 101 in 2005 to 80 in 2014. However, Grade 2 establishments increased from 154 in 2005 to 206 in 2014, while Grade 3 establishments declined from 186 in 2005 to 147 in 2014 (Table 6.3 & Figure 6.2). The number of nightclubs increased from 12 to 21 (Table 6.3 & Figure 6.2).

Figure 6.2: Numbers of restaurants and nightclubs, 2005-2014



Source: Ghana Tourism Authority

The number of licensed restaurants decreased at an average annual rate of 2.0% from 2005 to 2009, while from 2010-2014 the number of restaurants increased at an average annual rate of 4.7%, leading to an overall positive growth rate of 1.7% over the ten years (Table 6.4). The number of nightclubs showed strong growth in the first half of the period (18.3%), before slowing to an annual average growth rate of 2.5% over 2010-2014, resulting in a growth rate of 6.2% over the period 2005 to 2014.

Table 6.4: Trends in growth of restaurants and nightclubs, 2005-2014

		Average Annual Growth Rate (%)		
Category	Increase or decrease between 2005 & 2014	2005-2009	2010-2014	2005-2014
Restaurants	61	-2.0	4.7	1.7
Nightclubs	9	18.3	2.5	6.2

Source: Ghana Tourism Authority

7. SUMMARY AND POLICY IMPLICATIONS

7.1 Introduction

The main objective of this analysis was to present the current trends of domestic and international tourism in Ghana, from 2005 to 2014. The main source of data was Ghana Tourism Authority with supplementary data provided by other official bodies or collected by Ghana Statistical Service. The report provides an overview of the various sectors of the tourism market namely: international tourist arrivals and receipts, domestic and international air passenger and aircraft movements, visitor arrivals and revenue accruing to major tourist sites and community-based eco-tourism sites, accommodation capacity around the country and travel agencies, travel & tours, tour operations, car rental establishments, and restaurants.

7.2 Summary of Main Findings

The analysis has shown a period of considerable change in Ghana's tourism market. While there has certainly been overall growth in nearly every category (see Table 7.1), average annual growth rates show that in general, the market was growing at a faster pace in the first half of the period (2005-2009) than the second (2010-2014). International arrivals and receipts, and international and domestic passenger movements, showed positive growth across both halves of the period, but was stronger in the first half. Visitor arrivals and revenue accruing to selected major tourist sites and visitor arrivals to community-based eco-tourism sites all showed positive growth in the first half of the period but negative growth in the second, while real revenue for eco-tourism sites was negative in both halves of the period. Accommodation establishments showed positive and relatively equal levels of growth in both halves of the period while the number of other tourism establishments showed mixed growth across the decade.

Table 7.1: Summary of tourism market indicators, 2005 and 2014

Indicator	2005	2014	Increase/ Decrease
International Tourist Arrivals	392,500	1,093,000	↑
International Tourist Receipts	627.1 m USD$	2.067 bn USD$	↑
International Air Passenger Arrivals	382,200	812,200	↑
International Air Passenger Departures	427,000	838,300	↑
International Scheduled Aircraft Movements	12,473	24,871	↑
Domestic Air Passenger Arrivals	42,796	360,222	↑

Indicator	2005	2014	Increase/ Decrease
Domestic Air Passenger Departures	42,370	359,012	↑
Domestic Aircraft Movements	4,596	16,978	↑
Arrivals to Selected Major Tourist Sites	381,600	592,300	↑
Real Revenue Accruing to Selected Major Tourist Sites	GH¢490,000	GH¢492,200	↑
Arrivals to Selected Community-Based Eco-Tourism Sites	63,500	79,200	↑
Real Revenue Accruing to Selected Community-Based Eco-Tourism Sites	GH¢150,700	GH¢124,500	↓
Number of Hotels	1,345	2,570	↑
Number of Bedrooms	18,752	41,331	↑
Number of Bed-places	23,924	45.507	↑
Travel and Tours Establishments	211	200	↓
Travel Agencies	96	42	↓
Tour Operators	42	45	↑
Car Rental Establishments	53	85	↑
Restaurants	372	433	↑
Nightclubs	12	21	↓

The analysis shows that 2013 was a rather pivotal year for some areas of the tourism market with domestic and international aircraft movements peaking in this year before dropping or levelling off in 2014. Major tourism sites also saw the beginning of what may be a downward trend from 2013 onwards while for eco-tourism sites, this downward trend began in 2012. All other tourism supply establishments except restaurants and nightclubs peaked in number in 2013, before falling the following year.

7.2.1 *International Tourist Arrivals and Receipts, 2005 – 2014*

That international tourist arrivals and receipts showed a general upward trend which is encouraging and the importance of business and professional tourism should be capitalized upon throughout the market. However, the relatively poor performance of the leisure and recreation category indicates that opportunities to attract visitors for reasons other than business and tourism are being missed. Overseas Ghanaians are still an important part of the landscape of tourism in the country, though their numbers have dropped in recent years. Programmes to encourage or incentivize Ghanaians resident abroad to make trips back to Ghana may help to revive these numbers.

It is also clear that accommodation accounts for the largest proportion of expenditure across the years, therefore, reducing this cost may be an incentive to travelers. Indeed, the expansion of the budget travel sector seen in Chapter 5 may help to bring the cost of accommodation down.

7.2.2 *International and Domestic Air Passenger and Aircraft Movements, 2005 – 2014*

While international air travel has certainly gained importance across the years, domestic air travel has been the most notable growth story in this period, particularly from 2011 to 2013. While the growth in both international and domestic air travel is welcome, arrivals and departures for both categories slackened from 2012/2013 onwards perhaps indicating the beginning of a downward trend. Policies and programmes aimed at recovering growth in these sectors of the market would be helpful.

7.2.3 *Tourist sites, 2005-2014*

Visitor arrival figures and real revenue accruing to major and eco-tourism sites show a somewhat paradoxical trend. While the numbers of visitors generally rose over the period, the real revenue dropped as the average spend per visitor followed a downward trend throughout the period. In addition, visitor numbers themselves began to drop from 2011/2012 for both categories. Programmes aimed at encouraging both increased resident and non-resident visitor numbers and increased average spend per visitor may help to address these issues, which may in turn increase the proportion of international visitors coming into the country for leisure and recreation.

Key sites such as Kakum Park and Kintampo Waterfalls could be earmarked for further focus while attention is also given to the poorer performing sites to boost their visitor figures and revenue.

Given the geographical concentration of major tourist sites and eco-tourism sites, it would also be helpful to consider opening new sites to ensure an even distribution of the numbers of tourists visiting particular regions, or marketing individual regions as specializing in a particular tourist experience. For example, Volta region could be marketed as an eco-tours region, while Central region designated as a region for visiting historic sites.

7.2.4 *Accommodation Capacity in Ghana, 2005 – 2014*

The accommodation market in Ghana is dominated by budget hotels, the number of which more than doubled over the period and by 2014, accounted for approximately 70% of the market. Alongside this rise in budget accommodation, was a modest rise in the number of 5, 4, 3 and 2-star hotels, but a fall across these categories in room occupancy, indicates that the demand at this higher end of the market is falling.

The number of bedrooms and bed-places has also risen relatively steadily over the period though the average size of accommodation has remained relatively flat. In addition, much of the country's accommodation is concentrated in Greater Accra and Ashanti regions. To encourage a wider dispersal of visitors around the country, policies to support accommodation in currently underserved regions may be helpful.

7.2.5 Other Tourism Supply Establishments, 2005–2014

Other tourism supply establishments apart from restaurants and nightclubs peaked in number in 2013 before falling in 2014. Even though car rental establishments showed strong growth, the decrease in the number of travel agencies and travel and tour agencies may indicate that tourists are showing a preference for self-drive options than arranging through a company. The number of tour operators increased only marginally during the period. If this trend continues, policies to support expansion of the car rental sector may help to attract visitors and in turn make tourist sites more accessible.

The growth in Grade 2 restaurants mirrors the trend in growth of budget hotels. Demand has grown in the middle range restaurants and as a result, the number of higher and lower end restaurants have fallen. Policy options should either be an attempt to stimulate demand for higher and lower end restaurants or to further boost the growth of mid-range restaurants in line with the trend that has emerged.

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APPENDIX

CPI Series 2005-2014

2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
176.9	198.6	218.7	254.9	303.9	336.5	365.8	399.3	445.9	515.0