



THEME:
**REPOSITIONING NIGERIA'S TOURISM
& HOSPITALITY SECTORS FOR SUSTAINABLE
GROWTH AND PROFITABILITY**

**REPORT OF A FOCUS GROUP FORUM ON
THE TOURISM AND HOSPITALITY SECTORS IN NIGERIA
HELD ONLINE (VIRTUAL) ON THE 19TH OF AUGUST, 2021**

BY

THE TOURISM AND HOSPITALITY INDUSTRIES THEMATIC GROUP
UNDER THE TOURISM, HOSPITALITY, ENTERTAINMENT, CREATIVE &
SPORTS INDUSTRIES (THECS) POLICY COMMISSION

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1. BACKGROUND

The global tourism industry, which blends the lodging, food, beverages, attractions, cultural, and travel industries, is the world's largest industry ecosystem. Tourism provides 1 out of every 12 workers in the advanced and emerging economies. In 2018, according to the UNWTO, the number of international tourist arrivals worldwide reached 1.4 billion persons, two years before it was predicted to do so. Indeed, given this rapid pace of pre-covid-19 pandemic sectoral growth, the prediction (at that time) that international arrivals would reach 1.8 billion persons by 2030 may have been conservative. The benefits of this huge and consistent growth in tourists' arrivals are pretty clear to require further adumbration.

Nigeria is uniquely positioned as an all year round tourism destination with a strong domestic tourism sector; rich natural resources; strategic location (open all year round: rich cultural diversity; a variety of associated attractions including music, entertainment, sports, religion, culinary/ gastronomy, vibrant culture/heritage, etc.; good air connectivity; very robust industry incentives, world-class hotels, restaurants, lounges, delicatessens/fast food/confectioneries outlets, outstanding beverage industry (with the largest beverage cluster in Africa at Ninth Mile's Empower Free Trade Zone at Enugu State); outstanding tourist attractions friendly in all six geopolitical zones; friendly and enlightened population; longstanding international calendar events, etc. Even before the advent of the covid-19 pandemic, these sectoral strengths/opportunities have been significantly hampered by Poor tourism infrastructure, lack of reliable statistical tourist and economic measurements, poor visa policy Implementation protocol, hostile business environment and excessive taxation of the hospitality sector.

1.1. CONTEXT

The COVID 19 pandemic has impacted nearly every industry in unprecedented ways, including tourism & hospitality. The economic impact on the economy of most communities, states, countries and the entire world has been dramatic and highly noticeable because so many businesses shut down fast when, due to travel restrictions, people stopped moving about, and when people stopped travelling, many businesses shut down. There is currently an estimated 45% job cut, and the economy of the sector is so intricately connected to many other sectors of the economy that the huge loss of income from core tourism and hospitality enterprises has had a large multiplier effect because the larger industry ecosystem has been deeply affected as well. With over 7000 aeroplanes grounded for months worldwide in 2020 (and looming again for summer 2021), the WTTC estimated that over 50 million jobs would be lost in the travel, tourism and hospitality sectors as a result of the pandemic.

However, while other sectors have had the support of government and risk management strategies to help navigate the COVID 19 Crises, the tourism and hospitality industry in Nigeria does not have this level of support. This situation portends a major setback for the country during the global recovery period because most economies thrive better with the support of vibrant and profitable tourism and hospitality industries. Financial Recovery Fund and Government Support (or lack of it!) affect how the industries will bounce back. These underscore the imperative to develop a resilience-based framework (Crisis protocol) for COVID-19 Response (and other future emergencies) for the Tourism and Hospitality Industries. Currently, sector experts fear that there is a long road to sector recovery. According to the World Economic Forum in its February 2021 Report on the Travel and

Tourism Industry: The tourism industry lost an estimated \$1.3 trillion in export revenue in 2020. The travel industry's recovery will be slow as new COVID-19 variants are causing governments to continue using travel bans to stem the spread. Travel experts are now very cautious in their outlook, with the majority not expecting a return to pre-pandemic levels before 2023.

Hence, coming off the worst year in tourism history, there's little sense of optimism in the travel industry in early 2021. Following an estimated \$1.3 trillion loss in export revenue in 2020, travel restrictions are being reintroduced at the start of the new year, as governments are trying to curb the spread of new, potentially more dangerous variants of the novel coronavirus."

1.2. CHALLENGES AFFECTING THE NIGERIAN TOURISM AND HOSPITALITY INDUSTRIES INCLUDES

- The absence of comprehensive databases of operators nor clear, identifiable sector value chains to properly reposition the industries as viable business sectors of the economy.
- The Nigerian tourism and hospitality sectors have not fully adopted mainstream best practices in technological innovations and digital transformation initiatives that are making these sectors smarter at the global level.
- In Nigeria's national economic planning (and in the Policy Documents) there is no formal recognition of the linkages between sports, culture, entertainment, creative industries (arts/crafts inclusive), agriculture, cuisine, the environment, infrastructure, transport, security, as enablers for the exponential growth of the tourism and hospitality.
- Security is a major issue in tourism management, and criminals often see tourism and tourists as symbols of decadence. The impact of crime and terrorism on the tourism and hospitality industries and on the economic development of Nigeria cannot be overemphasised. Tourism sites tend to be soft targets, and the fact is that all over the world, there is a false sense of security by industry practitioners until a major crisis occurs. It costs more to recover from an incident than it does to prevent one. So, the issue of tourism security has to be taken more seriously in Nigeria if we expect the sector and the hospitality sector, as well, to increase their contribution to Nigeria's GDP.
- It will be expedient to investigate the economic wisdom for additional specialised free zones (other than Tinapa) to boost sectoral development.
- The imperative for completion of outstanding privatisations for the sectors.
- The imperative for institutionalising a sustainable funding scheme for all tourism and hospitality industry operators/developmental projects, recognising the fact that the sector's projects are long term and are usually capital intensive.

1.3. OBJECTIVES AND RATIONALE FOR THE FOCUS GROUP FORUM

- Conduct a complete overview of the economics of the tourism and hospitality sectors. Gain insight into the sector's Debt & Equity profile, Investment opportunities, blended financing, and conversations about grants.
- Research visitor safety, risk management issues and tourism /hospitality safety. Tackle the issues of crime and terrorism and the role of the Police in tourism/hospitality sectors development and sustainability.

- Tackle the issue of statistics and data collection for the Tourism and Hospitality Industries as a prerequisite for meaningful sector planning and development.
- Interrogate tourism and hospitality sectoral operations public enterprises and create a path for the privatisation and commercialisation of national tourism, hospitality, and cultural assets for optimal economic advantage.
- Examine ways to increase the sector's contribution to Nigeria's GDP, reduce Capital Flight arising from outbound tourism and identify ways to promote domestic tourism and attract the vibrant and lucrative diaspora market (reverse tourism).

1.4 EXPECTED OUTCOMES

- Tourism Industry Needs Assessment: A document that clearly details the policy needs assessments for Nigeria
- Enhanced engagement of stakeholders connecting government, regulatory agencies, private sector and social enterprise sector to address the challenges of the Tourism and Hospitality Industries as business sectors of the economy.
- Establish the relationship framework that would be required to accelerate the development of the Tourism and Hospitality industry ecosystem in Nigeria.
- Consensus building to mutually agree on a Framework of Action for holistic reform of the tourism and hospitality sectors for sustainable growth and profitability as envisaged in the benchmarking documents earlier outlined, and incorporating strategies for making tourism smarter through technological innovation and digital transformation.

2. DESIGN SESSION ONE: CROSS-CUTTING INDUSTRY GOVERNANCE ISSUES

<p>Session Moderator:</p> <p>Mrs. Ngozi Ngoka,</p> <p>Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)</p>	<p>Panellists:</p> <ul style="list-style-type: none"> • Ms. Yewande Sadiku, Executive Secretary/CEO Nigeria Investment Promotion Commission (NIPC) • Dr. Yemi Kale, Director-General, National Bureau of Statistics • Mr. Muhammed Babandede, Comptroller-General, Nigeria Immigration Services (NIS) • Mr. Muhammad Nami, Chairman, Federal Inland Revenue Service (FIRS) • Mrs. Patricia Narai, Director, Domestic & Eco-Tourism Promotion & Control Department, Federal Ministry of Information and Culture (FMIC) • Alhaji Aminu Agoha, Chairman, Tourism Consultants Forum
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	<ul style="list-style-type: none"> • Olumide Akpata, President, Nigerian Bar Association • Dr. Taiwo Oluwatoyin Emmanuel, Commissioner for Tourism and Culture, Ogun State.
Discussions were situated within the context of rethinking the governance framework for Nigeria's Tourism and Hospitality Sectors.	

2.1 **Strategic Insights and Highlights of the Main Point by Panellists**

Mr. Mohammed Babandede

- New Visa Policy to Promote Tourism

The Nigerian government has a new Nigerian Visa Policy that allows for collecting visas at the point of entry. This policy helps Nigerians in the diaspora come into Nigeria without a visa and get the visa at entry. This policy also allows for those with expired passports to travel in. This policy helps increase the influx of tourists into the country. There is also the option of a group visa being obtained by tourist guides. However, there is the fear of different rates being charged by tour guides, and as such, the online application for visas is highly recommended. The initial fears associated with religious tourism have been dealt with, and at the moment, it is being viewed as an advantage for the country. Tourists with African passports have also been given the privilege of receiving visas at the point of entry.

Ms. Yewande Sadiku represented by Adeshina Emmanuel

- Pioneer Status Incentive

The Tourism and Hospitality Sector helps in the diversification of government revenues, conservation of foreign exchange, employment creation, amongst others. This sector, which has been a significant contributor to the development of Nigeria, has been classified as one of the pioneer sectors to enjoy incentives which include tax holidays for as long as 3 years, extendable to 5 years. However, these incentives are available for only those about to start out or are in their first year of operation. Those who engage in infrastructural development also qualify for these incentives.

Mr. Muhammad Nami represented by Osavize Winful

- Tax Responsibilities of Members of the Sector

The Federal Inland Revenue Service, which deals with the taxes of every economy sector, has begun educating the general public through its websites on the taxes available for everyone to pay. For those in the sector, VAT and CIT are the two taxes that should be paid. The problem of multiple taxes being paid is currently being addressed by the National Tax Board, where work is being done to have a unified tax payment system. The 2019 tax and Finance Act is designed in such a way that small businesses such as travel agents, little hotels, and lounges enjoy doing business. There is a tax structure that has been made available for players in the industry. Those with a turnover of under 25 million naira are exempted from paying tax, except for VAT which is charged to customers; those with a turnover of over 25 million naira pay taxes to the tune of 25% and those with over 100 million naira as turn over pay 30% in taxes, including VAT.

Mr. Taiwo Oluwatoyin

- Tourism: The Next Big thing

The tourism sector in Ogun State is currently being promoted aggressively, and discussions with stakeholders are ongoing to see the next steps for the sector. Over 60 tourist centres have been identified and work is being done to develop them. The landscape and waterways are being developed for the construction of resorts, water cruises to aid and attract tourists. As the state with the highest influx of religious tourists (an appreciable number of religious bodies are headquartered in the state), the government is developing as many tourists' attraction sites as possible.

Mrs. Patricia Narai

- Domestic Tourism

In the wake of the COVID 19 pandemic, the influx of foreign tourists is at the lowest; hence there is a need to encourage domestic tourism. This is being achieved by the promotion of local attraction sites in states, the beautification of existing states, and a partnership/collaboration to encourage domestic tourists. A "welcome to Nigeria" project is well underway and will be held annually and rotated within the states, starting with the FCT in December.

Alhaji Aminu Agoha

- Effects of the Pandemic

With the pandemic came a grounding of the travel industry. The lockdown meant that tickets already issued needed to be refunded, which could not be for obvious reasons. A long prelude of court cases ensued, and at the moment, the only solution that can be proffered is the extension of the validity of tickets to between 18 and 24 months. There is a need for government intervention for the travel industry to stay afloat. The initial palliatives were meagre and could not meet the needs of those within the travel space.

2.2 Issues and Challenges Identified

- **Multiple Taxation**

One major issue within the Tourism and Hospitality Sector is that of multiple-taxation. The numerous levies being charged for the same thing under different guises have long been an issue within the sector. There is a need for clarity on the taxes to be paid. This will involve the unification of taxes by the Federal, State, and Local governments. These taxes all come at a cost that is crippling to the growth of the business. The government should give tax holidays or waivers in the wake of the pandemic instead of more levies being added as is currently the reality.

- **Visa Application**

With technology, air travel users expect that online visa applications are made available, but access to this has been challenging over time. Tourists also fear using their credit cards in making purchases because they have a wrong perception of Nigeria.

- **Pandemic Induced Low Influx of Tourists**

The pandemic has reduced the influx of tourists into the country. This has impacted the tourism industry in no small way, and as such, there is a need to focus on promoting domestic tourism. The low influx of tourists has affected foreign exchange and the economic development of Nigeria.

- **Incurred Debt**

Much debt was incurred as the pandemic ravaged the world. People could not go to their respective destinations, even after they had bought their tickets. In 2020, over sixteen thousand (16,000) planes were grounded as a result of the pandemic. In May 2021, about 7,000 planes were still grounded. Over this period, the travel industry has become indebted to its customers, and many court cases ensued. There is a need for the government to intervene in the travel sector.

2.3 Recommendations and Action Points

- **Unify taxes**

The FIRS has begun to work on the unification of taxes; this is in place through the 2019 tax and Finance Act. There is also a series of sensitisation through the help desk, websites, and other avenues for the public to know the various taxes to be paid. The tax office also has many tax incentives such as concessions, tax holidays, capital depreciation allowance, and long years of a moratorium for the public. It is therefore crucial that players in the industry are sensitized on how to benefit from the current initiatives by the government.

- **Sensitive all Stakeholders on the Ease of Visa Application for Tourism**

The Nigerian government has ensured that the processes involved in obtaining visas are now a lot easier. Visas can now be paid and approved online. This reduces the inflow and outflow to the airport for visas. To also ease movement into Nigeria, the Nigerian government has also established a new law that allows tourists to receive visas at the point of entry. The Federal Government also has the option for tourist guides to help in group visas with a unified feel across the board to avoid

discrepancies. Stakeholders in the tourism and hospitality industries, as well as the general public, however need to be sensitized on these initiatives.

- **Promote Domestic Tourism**

Domestic Tourism is the way to go till the pandemic is a thing of the past. Domestic tourism is being encouraged through strategic visits to beautify existing tourist centres while also promoting new tourist attraction sites. There are a lot of collaborations currently ongoing to see to the promotion of tourism. These include the "welcome to Nigeria initiative," production of tourism textbooks for students, the use of digital technology to promote tourists' attraction, amongst others. All efforts by government geared towards promoting domestic tourism should therefore be consolidated and improved upon.

- **Extension of the Validity of Tickets**

In the face of the inability to refund monies paid for tickets, the travel industry decided to extend the validity of tickets to 18 to 24 months. Several airlines declared bankruptcy and were unable to make refunds. In this light, the travel industry behooves the government to intervene in its sector and provide palliatives/relief for its members to stay afloat. There is also a poor perception of Nigerians worldwide, thus affecting how Nigerians are treated worldwide; a National Carrier is needed to deal with this.

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
Unification of taxes	Federal Inland Revenue Service (FIRS)	Create awareness of the taxes to be paid Create a unilateral system where all levies or taxes can be paid into		
Visa Application	Nigeria Immigration Services (NIS)	Create awareness on the ease of online visa application.		
Domestic Tourism	State Governments	Promote tourist attraction sites per state.	Tourism and Hospitality Associations	Promote tourist attraction sites per state Create a repository of tourist sites within the state for tourists to know the locations and stand to

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
				benefit/enjoy visiting such places.
Government's assistance of the Travel Industry	Federal Government	Reach out to stakeholders of the Travel Industry/ Sector with palliatives to help the sector		

3. DESIGN SESSION TWO: DEEP DIVE INDUSTRY OPERATIONS ISSUES

<p>Session Moderator:</p> <p>Mrs. Ngozi Ngoka,</p> <p>Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)</p>	<p>Panellists:</p> <ul style="list-style-type: none"> • Alhaji Nura Kangiwa, Director-General, National Institute of Hospitality and Tourism (NIHOTOUR) • Chief Tomi Akingbogun, Proprietor, Rosebud Hotels, Abuja • Mrs. Abosede Ayeni, CEO, Tantalizers PLC • Ms. Lola Akinmade Akerstorm Founder, Geotraveler Media • Mr. Trevor Ward, Managing Director, W Hospitality Group • Mr. Paul Onwuanibe, CEO. Landmark Africa • Mr. Idris Nyam, Kaduna State Commissioner for Business and Innovation and Technology
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This session took a deep dive into operational issues within the Tourism and Hospitality Sectors.

3.1 Strategic Insights and Highlight of Main Points by Panellists

The Tourism and Hospitality sectors are affected by the absence of skilled manpower; panellists emphasised this as well as the need for training and standardisation of employees in the Tourism and Hospitality industries. They also emphasised the following:

- The importance of the regulatory bodies in the sector
- The need to fund the sector
- Extraneous and External factors that have had tremendous impact on the sector over the years

- Poor investment in marketing and communication
- Partnership with the Private sector and commitment to return on investment.

3.2 Issues and Challenges Identified

- **Lack of sustainability and continuity**

This is common among Nigerians because a change of governance equates to the abandoning of projects. Continuity from one administration to another is one of the challenges faced by the sector. The devastating impact of this has led to a significant decline in both private and public participation in the sector.

- **Absence of a Tourism Brochure**

This problem is existential in Nigeria. Most tourist sites in Nigeria do not have brochures that would allow tourists to gain insight into their services.

- **Lack of Regulation among Players in the Industry**

Another challenge is the industry's lack of regulation, which has made it easy to venture into the hospitality and tourism business compared to other tourists' destinations. For instance, an investor can decide to build hotels and employ his relatives without basic training on standards and best practices of the sector. This, in turn, has contributed significantly to the poor level of services experienced in the sector.

- **Poor Human Capital**

There is a prevalence of poor human capital in the sector. As reflected in the poor customer services seen in most hotels in Nigeria, the lack of well-trained personnel has made Nigeria a non-competitive tourist destination. This has led to the loss of tourist arrivals, especially when compared to neighbouring West African countries like Ghana, whose tourist arrivals quadruples that of Nigeria.

- **Security Crisis**

As noted by Mr Paul Onwunibe, "Foreigners invest only in places they can go on vacations". The heightened security challenges in the country serve as a discouragement to tourists.

- **Weakened Currency**

From the economic perspective, the impact of weakened currency and reduced buying power led to reliance on domestic tourists with significant constrain on foreign earnings. Therefore, the economic situation serves as a disincentive to investors.

- **Unattractiveness of the Industry**

Another challenge is the aspect of "People" not being given enough prominence. As noted by Trevor Ward, "You can have everything you want in life if you would help other people get what they want". Attracting the right set of people to the tourism and hospitality sector has been a significant challenge.

Recently, a report revealed that people willingly withdrew from the industry because of its lack of attractiveness and bad treatment from owners.

- **Lack of adequate enlightenment and sensitisation**

In chief Tomi Akingbogun words, it is not like Nigerians do not have ideas to get things done. Still, those that will implement these ideas are not aware of the contribution of the Tourism and Hospitality sector to the economy. Hence the enormous educational deficiency is a significant bottleneck to the development of the sector.

- **Multiple Taxes and Levies**

The various taxes paid by investors in this sector make it practically impossible to encourage growth and sustainability. Taxes such as the Gaseous Emission Permit for Hostels is a huge discouragement.

- **Limited Access to Funds and High-Interest Rates**

Investors rely primarily on borrowing. The hospitality sector is faced with the pandemic of limited access to funds or no funds at all. In cases of available funds, high-interest rates are prevalent. Interest rates as high as 20-32% will swerve away long-term investors.

- **Lack of Support for the Tourism and Hospitality Sector during the Pandemic**

At the heart of the pandemic, the sector was left to fend for itself. The N75 billion support fund released was only a gainsay.

3.3 Recommendations and Action Points

- **Improve the Regulatory Environment**

The regulators need to sit down with the private sector that understands the impact of Tourism and map out policies that would enable its growth, such as tax incentives, funding, red-tape, and protection of historical sites, among others.

- **Invest in Infrastructural Development**

Availability of good roads, power, beautifications, water, sewage, etc., will give a whole arrival experience to the tourist.

- **Improve Security**

Government should ensure that the country is safe enough to attract tourists.

- **NIHOTOUR Should Collect Database of Operators within the Industry**

The National Institute for Hospitality and Tourism (NIHOTOUR) should fast-track the signing of MOU with the Nigerian Bureau of statistics to set up a labour market information system for the sector. It will provide a database for all operators across all value chains to engage them in discussions that can improve the standard of practice.

- **Human Capacity Development**

This should include both formal education and skills acquisition for all categories of people. This will help in identifying skill gaps and promote understanding of the sector right from the elementary level. Also, the National Institute for Hospitality and Tourism should priorities training and expansion of the number of training centers across the country. Investment in the e-learning platform should also be prioritized.

- **Creation of a Tourism Development Bank**

With financial institutions' inability to give out loans to investors in the sector, Tourism Banks should be created to give long-term loans with favourable interest rates for long-term investments. Also, the Tourism Development Fund (TDF) bill should be passed.

- **Government should incentivise the sector to encourage investment into the sector.**

Financial institutions should be encouraged to give long term loans at a favourable interest rate. In addition, funding of the sector is key to its development; government should increase the allocation in budgetary terms to the sector. There should also be sector-specific incentives for the Tourism and Hospitality Industry from the Nigerian Investment Promotion Commission.

- **Adoption of a Single Tax Regime**

A single tax regime should be adopted, and the duplicity of functions by different agents should be discouraged. All taxes should be moderated by a central body (government) to promote practicability.

- **Investment in Communication and Marketing**

This should be encouraged to promote tourism products. Also, positive publicity about Nigeria should be encouraged.

- **Provision of a Proper Regulatory Framework**

This is to ensure standardisation and compliance with global best practices.

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
Creation of a Sector Enhancing Regulatory Environment	Federal/State Ministries of Information and Culture and other relevant government MDAs.	Create friendly policies (including tax incentives) to enhance the growth of the sector	NESG	Provide a platform for dialogue between the private and public sector towards the creation of an enabling regulatory environment/policies for the growth of the Tourism and Hospitality Sector

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
The government should pay particular attention to Infrastructural Development.	Federal Government	Improve the quality of infrastructure in the country with specific attention on areas leading to tourist locations.		
Improvement of the Security situation of the country	Federal Government of Nigeria	Improve the security system in Nigeria to attract tourists.		
Collation of database of operators within the industry	National Institute of Hospitality and Tourism (NIHOTOUR)	Collate the database of all operators within the sector Set up a labour market information system in collaboration with the National Bureau of Statistics (NBS)		
Rigorous Human Capacity Development	NIHOTOUR	Prioritisation of training and expansion of training centres across the country	Private Stakeholders	In-house training of staff members to ensure that tourists' get the best service
Passage of the Tourism Development Fund (TDF) bill and Creation of Tourism Bank		Tourism Banks should be created to give long-term loans for a long-term investment with favourable interest rates.		

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
		Passing of the Tourism Development Fund (TDF) bill should be prioritised.		
Incentivising of players in the sector to encourage investment into the sector	Nigeria Investment Promotion Commission (NIPC)	The government should give sector-specific incentives, such as tax holidays and concessions, especially in the wake of the COVID-19 pandemic. Increase in the budgetary allocation to the sector	Financial Institutions	Financial institutions should be encouraged to give long term loans at a favourable interest rate.
Adoption of a Single Tax Regime	Federal Inland Revenue Services	Adoption of a single tax regime Moderation of taxes by the government		
Provision of a Proper Regulatory Framework		Standardisation and compliance with global best practices.		

4. DESIGN SESSION THREE: SPECIAL COMMENT SEGMENT

<p>Session Moderator:</p> <p>Mrs. Ngozi Ngoka,</p> <p>Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)</p>	<p>Panellists:</p> <ul style="list-style-type: none"> • Mr. Francis Anatogu, Senior Special to the President on Public Sector Matter/Secretary, National Action Committee on Africa Continental Free Trade Area (AFCTA) • Dr. Ted Iseghoi - Edward, Director-General, Association of Local Governments of Nigeria (ALGON) Secretariat • Mr. Hassan Abdullahi Zakari, Association of Tourism Practitioners of Nigeria • Mr. Guy Murray Bruce, CEO, Silverbird Organisation • Mr. Samson Fatokun, Head of Account Management, West & Central Africa, International Air Transport Organisation (IATA) • Mr. Michael Williams, Former Managing Director, Cross River State Tourism Bureau • Mazi Uche Ohia, Imo State Commissioner for Tourism <p>Public and private sector practitioners in the industry provided strategic insights on the financing, legislating, and practical issues in the tourism and hospitality sectors of the Nigerian economy.</p>
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4.1 Strategic Insights and Highlight of Main Points by Panelists

- **Technology offers an alternative solution to current challenges in Nigeria.** Deployment of technology would therefore help achieve equitable tourism and hospitality sectors for consumers and businesses.
- **Multiple regulations and supervisory bottleneck**

This issue is a significant drawback for the development of the industry. It is also a disincentive and discourages new investments and players.

- **Proliferation of industry associations**

The issue of multiple associations representing different players and business across key activities was addressed.

- **Need for change in industry products or service framework**

Most of the products in the industry are targeted at high-net-worth families or consumers. As a result, many people see the industry as an "Elitist Industry."

- **Need for a self-regulation industry in partnership with government agencies**

Self-regulation for industry players is in line with best practices across the globe. The industry associations regulate members in accordance with laid down laws established in collaboration with sectoral government agencies.

- **Convergence of Players and Association under 'One Umbrella Body'**

There is a need to bring all associations in the industry under one central umbrella for effective liaising with government and relevant agencies. The Federation of Tourism Associations of Nigeria (FTAN) was suggested as a good institution for this role. The activities of Sectoral Industry Associations should be held to high standards and best practices by including mandatory membership of lawyers on Association boards to ensure that proper corporate governance and best practices are adhered to.

- **Making Travel Equitable and Transparent.**

Local Plus allows people to virtually travel to places and shop in those places. This start-up enables people to see Nigeria in a different light and evade the costs of VISAs for interested tourism. Building trust is the core of the project. The aim is to demonstrate that items bought virtually from Nigeria are of the same quality as physical items supplied.

4.2 Issues and Challenges Identified

- **Increasing cost of operation.**

For the Cinema business, operational costs remained stagnant while revenues dwindled significantly due to a COVID-induced fall in patronage and foreign exchange.

- **Inadequate investment into the tourism and hospitality sector**

This is facilitated by the absence of confidence in the tourism sector and the elitist framework of industry players, which deters financiers' confidence in the sector's ability to sustain cash flow, which typically should come from the masses.

- **Insecurity across the country threatens the sustainability of the tourism industry.**

The rising incidence of kidnapping, road robbery, and other vices has threatened many tourism locations' sustainability. Owing to these reasons, many entertainments spots and recreation centres are experiencing low patronage from resident fun-lovers and foreign tourists.

- **Non-coordination of industry players**

Aside from the proliferation of associations, the personal ego of tourism associations' leadership impedes the consolidation and coordination of activities in the industry.

- **Lack of synergy and coordination in the development of infrastructure**

For example, it is a global practice for a country to integrate tourism infrastructure into its transport infrastructure development. This is, however, not the practice in Nigeria.

- **Widespread negative images or perceptions about Nigeria**

As a result, many tourists avoid making Nigeria a destination point due to the perverting negative stories about the country, despite the availability of exciting and wonderful tourist sites in Nigeria. There are significant worries about the visa procurement process, insecurity etc. All these create a trust deficit for Nigeria.

- **Poor implementation of industry plans or regulations**

This has resulted in a weak legal framework for operations in the industry and poor supervision by relevant industry associations. In some cases, poor implementation of regulations and masterplan has also created considerable barriers to the growth and productivity of the industry.

4.3 Recommendations and Action Points

- **Widespread Vaccination of Citizens**

Considering the adverse effect of the coronavirus pandemic on consumer demand in the tourism, cinematic and hospitality industries, the government should expedite the vaccination of people as this is the only way to enable freedom and confidence, which will, in turn, stimulate tourism businesses.

- **Foster partnerships between businesses and the government in the tourism and hospitality sector in the design of regulations**

Several policies and laws have been put in place to address the tourism and hospitality sector issues, some of which are outdated. Hence, it is pertinent to review them to guarantee their alignment to current global standards and their relevance to everyday challenges. Furthermore, the Tourism Masterplan must be effectively implemented, and the Associations' code of ethics must be effectively implemented to enhance regulation and the performance of the sector.

- **Consolidate the Tourism Industry Players**

Tourism and Hospitality sectors business membership associations should come together under one umbrella body to enable effective advocacy to the government.

- **Develop Tourism Products**

The government should develop multiple tourism products leveraging traditional beliefs such as the Ifa and other religious tourism. Also, the government must seek to restructure the tourism industry to ensure that it is product-driven. National Parks can be privatised to improve their efficiency and add to the number of viable tourism products Nigeria can develop.

- **Public-Private Collaboration**

Initiate partnerships between the subnational governments and the tourism sector businesses through a roundtable done in Imo state. This is to ensure synergy and collaborations between both players to advance tourism at the state level.

- **Eliminate Insecurity**

The problem of insecurity should be addressed to develop the travel, tourism, and hospitality sectors. Government should urgently address the issue of insecurity at all levels. Indigenes and residents of tourist communities must be enlightened on the value of tourism on their community, and their support in the fight against insecurity should be elicited.

- **Comprehensively Review Legislation Relevant to the Tourism and Hospitality Sector:**

Section 7 of the NTDC Act contradicts the provisions of the exclusive list of the Constitution on tourism sector regulations on licensing and taxation. As a result, the relevant laws must be reviewed and amended to ensure adherence to global best practices and facilitate investment inflow into the tourism and hospitality sectors. Legal advisers, tourism and hospitality associations and sector experts must be engaged to review the NTDC Act. Tourism should be moved to the concurrent list to enable all tiers of government to benefit from the sector effectively.

- **Facilitate the Flow of Capital into the Tourism and Hospitality Sector**

The one-stop-shop model for investments imbibed by the NIPC should be replicated for tourism and hospitality sector investments. This will facilitate investment inflow into the sector.

- Tourism sector players are encouraged to digitise access to tourism facilities. This will enable the attraction of tourists.
- Expand the number of tourism sites (heritage sites) and aggressively seek to improve awareness of such sites to attract tourists. This should be premised on aggressive investment by the subnational governments towards building baseline tourism data to enable decision making and facilitate investment.
- The visibility of cultural events should be scaled to the national and international levels.

- **Strategic Development of Air Infrastructure to Advance the Tourism and Hospitality Industry**

The government must strategically develop air infrastructure considering its correlation and relevance to the tourism sector. Incentivise air services and ensure a systemic consideration of air transport in the design of tourism development plans.

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
Widespread Vaccination of Citizens		Vaccination of citizens to promote confidence and freedom of movement for tourists' activities		
Public and Private Partnerships/ Collaborations in the design of regulations	Federal Ministry of Information and Culture	Review of regulations to align to current global standards.	NESG	Provide a platform for dialogue between the private and public sectors on the design of regulations.

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
		Implementation of Tourism Masterplan.		
Consolidate the Tourism Industry Players	All Tourism and Hospitality Sectors Membership Business Associations	Rallying together of industry players to enable effective advocacy.		
Restructuring of the Tourism Industry	Federal Ministry of Information and Culture	Develop multiple tourism products leveraging traditional beliefs such as the Ifa and other religious tourism.	NESG	Provide a platform for dialogue between the private and public sector on the privatisation of National Parks to improve efficiency.
Public-Private Collaboration			NESG	Provide a platform for dialogue between the private and public sector to initiate partnerships/collaborations between the subnational governments and the tourism sector.
Eliminate Insecurity	Federal Government	Urgent address of the issue of insecurity.		
Comprehensive review of legislation relevant to the Tourism and Hospitality Sector	Nigerian Tourism Development Corporation (NTDC)	Review and probable amendment of relevant existing laws to ensure adherence to global best practices. The Legal advisers, tourism		

Key Priorities	Government Driven		Private Sector Driven	
	Responsibility	Action Step and KPIs	Responsibility	Action Step and KPIs
		and hospitality associations and sector experts must be engaged to review the NTDC Act.		
Facilitate the Flow of Capital into the Tourism and Hospitality Sector	NIPC	Replicate the use of the one-stop-shop model for investment. Digitisation of access to tourism facilities. Build a baseline tourism data.		
Strategic Development of Air Infrastructure to Advance the Tourism and Hospitality Industry	Nigeria Immigration Services (NIS)	Develop air infrastructure considering its correlation and relevance to the tourism sector Incentivise air services and ensure a systemic consideration of air transport.		

5. DESIGN SESSION FOUR: COLLABORATIVE IMPLEMENTATION FRAMEWORK

<p>Session Moderator:</p> <p>Mrs. Ngozi Ngoka,</p> <p>Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)</p>	<p>Panellists:</p> <ul style="list-style-type: none"> • Mrs. Kehinde Kamson, President, Restaurants and Food Services Proprietors Association of Nigeria (REFSPAN) • Dr. Ted Iseghoi - Edward, Director-General, Association of Local Governments of Nigeria (ALGON) Secretariat • Mr. Lawrence Ejiofor, Delta Commissioner of Culture and Tourism
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	<ul style="list-style-type: none"> • Mr. Lawrence Ogiewa, Edo State Commissioner of Arts, Culture, Tourism and Diaspora Affairs • Mazi Uche Ohia, PhD, Imo State Commissioner of Tourism • Dr. Taiwo Oluwatoyin Emmanuel, Ogun State Commissioner for Tourism and Culture • Deji Falae, Ondo State Commissioner for Tourism • Idris Nyam, Kaduna State Commissioner for Business and Innovation and Technology • Mr. Francis Anatogu, Senior Special to the President on Public Sector Matter/Secretary, National Action Committee on Africa Continental Free Trade Area (AFCTA) • Dr Dasuki Arabi, Director-General BPSR
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5.1 Strategic Insights and Highlight of Main Points by Panellists

- Restaurants and Food Services Proprietors Association of Nigeria (REFSPAN) is Nigeria's premier national association of food vendors. It serves as a nexus between leading brands of food vendors, customers and government. The organisation serves as a capacity-building platform for its members. In developing a road map geared at changing the sector, the member needs lots of government support.
- However, the sector suffers from multiple taxations, VAT and consumption Taxes which shouldn't feature on the liability of members businesses since there are gaps in the infrastructure and governance services which the members are supporting the government. More so, the sector relies on the importation of some items for garnishing the food, but the members are happy with what the government is doing with rice as its activities have stabilised the market. Also, a step-up is needed as rice is still not available when the members need it.
- It's worthy to note that only 2% of the operators in the sector have received the government COVID 19 Palliatives. Government should attend to the challenge of supply chain disruptions due to banditries, terrorism and kidnapping. This will enable operators to work effectively. Also, fixing the electricity issues in the country should be prioritised.
- Over the pandemic, reforms in the sector are ongoing as the operator has improved their delivery system, ramped up their telephone access, simplified their processes and packages, etc. Moreover, banditry and kidnapping are the biggest threat to the growth and development of the industry.
- The DG Bureau of Public Service Reforms (BPSR) mentioned that the institution is mandated to reform government institutions and contact state agencies. Also, BPRS will capture the National strategy on tourism as a subtopic in the agency's national policy.
- Ondo state has designed a 9-point agenda for the state. It is in partnership with aimed at repositioning the Iderin Hill, Aruole Hill and the development of the coastline with Lagos State.

Also, the state holds a partnership with Tourism and Hospitality Business Associations and the educational institution to develop the state manpower.

- NIHOTOUR express the desire to partner with the NESG on the development of the tourism sector by offering pieces of training.

5.2 Commitment to the Road Map from Stakeholders in the Industry

- Delta State committed to the road map and will do its best to make the state a tourist destination.
- **Chief Akingbogun** - FTAN (Federation of Tourism Associations of Nigeria) approves the road map and will support in any way they can.
- **Idris Nyam**, Kaduna State Commissioner for Business and Innovation and Technology - Approved the Roadmap. Will appreciate the framework proposal to be shared with the statehouse.
- **Olufunke sholeye** - Committed to the road map
- **Mr Enitan Rewane**- NBA section of travel hospitality -Committed to supporting the process and will support in the legal aspect.
- **Mrs. Kehinde Kamson**, President, Restaurants and Food Services Proprietors Association of Nigeria (REFSPAN) committed to the Road Map.
- **Dr Dasuki Arabi** DG - Bureau of Public Service Reforms (BPSR) committed to the road map. He noted that his agency's commitment is beyond this programme as the Bureau is concerned with reforming public institutions.
- **Joesef Karim**- NIHOTO committed to the roadmap
- **Mr Aderinola Adeola**, representing the Ondo State Commissioner of Tourism also gave his commitment.
- **Mrs. Olufunke Soneye** representing Mr. Folorunsho Coker, DG Nigerian Tourism Development Corporation (NTDC), also stated that the NTDC is committed to the roadmap. She however stressed the need for implementation.

6. ADDENDA

I. Webinar Introductions by Dr. Ikenna Nwosu, Facilitator, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission, Nigerian Economic Summit Group (NESG)

Good evening, ladies and gentlemen. It is my pleasure to be addressing this distinguished audience this morning. My name is Dr. Ikenna Nwosu, I am the facilitator of one of the 13 policy commissions in the Nigerian Economic Summit Group (NESG), which is called Tourism, Hospitality, Entertainment, Creative and Sport Policy Commissions. I am privileged to make this introduction today as we welcome everybody from across the world to the focused group forum of the Tourism and Hospitality Sector in Nigeria. The forum is being hosted by the Tourism and Hospitality Industry Thematic Group of the Nigerian Economic Summit Group and we are basically focused on discussing and getting stakeholders' consensus on how to reposition the tourism and hospitality sector in the country which you know globally has been battled by Covid-19 Pandemic. So, we promise to have a very exciting session today.

The theme of the focused group forum is "Repositioning of the Tourism and Hospitality Sector for sustainable Growth and Profitability". We have very exciting arrays of resource sessions. We have 5 sessions; opening ceremony, and 4 technical sessions. And for the entire event which we would have from 9:00am to 5:00pm, we expect maximum attention, maximum contribution from all stakeholders, public-private, social enterprise, labour and the press. So, going in line with the usual protocol, distinguished Senators from the House of Representatives members, the Permanent Secretary: Information and Culture, the Honourable Commissioners of Tourism from all States of the federation present here, the Chairman of the Policy Commission of the Nigerian Economic Summit Group, and other Directors of the NESG, other members of the Nigerian Economic Summit Group, different operators and organisation members in the Tourism and Hospitality Sector, Captains of Industries, Ladies and Gentlemen of the Press, Distinguished Ladies and Gentlemen.

So, without much ado, I will like to introduce the board member of the Nigeria Economic Summit Group and the Chairman of the Steering committee of the Tourism, Hospitality, Entertainment, Creative and Sport Industry Policy Commission: Mr. Udemé Ufot, to give us his welcome speech to formally declare the event opened. Mr. Udemé Ufot please, you have the flow now.

II. **Welcome Address by Mr. Udemé Ufot, Private Sector Co-Chair of the Tourism, Hospitality, Entertainment, Creatives and Sports Industries Policy Commission (THECS PC), of the Nigerian Economic Summit Group.**

1. His Excellency, the Chairman, Nigerian Governors' Forum, and Executive Governor of Ekiti State, Nigeria, Dr Kayode Fayemi,
 - Distinguished Chairmen of the Senate and House of Representatives Committees on Tourism, and other States Legislators,
 - The Permanent Secretary, Federal Ministry of Information and Culture, Federal Republic of Nigeria
 - Honourable Commissioners of Tourism from the Federating States Government of the Federal Republic of Nigeria and the Federal Capital Territory, Abuja
 - Heads of Ministries, Departments and Agencies of Government,
 - Special Guests here present
 - Captains of Industry/Organized Private Sector bodies and operators
 - Operators, business membership organizations and labour unions in the tourism and hospitality sectors in Nigeria and beyond
 - Development Partners, Members of the International Community and the Diplomatic Corps
 - Gentlemen of the Press
 - Distinguished Ladies and Gentlemen!
2. On behalf of the Board, Management and Members of the Nigerian Economic Summit Group (NESG), I am very pleased to welcome you all to this epic Focus Group Forum on the Tourism and Hospitality Sectors in Nigeria themed: ***"Repositioning Nigeria's Tourism and Hospitality Sectors for Sustainable Growth and Profitability"***.
3. As Nigeria's leading economic sector policy advocacy Think Tank, the Nigerian Economic Summit Group, NESG, is witness to the exponential growth of the tourism and hospitality sectors in Nigeria, particularly over the last decade, following NESG's ground-breaking joint initiative in 2008 with the then Federal Ministry of Tourism, Culture and National Orientation to organise a series of events that resulted in the positive and accelerated transformation of the sectors, to wit:
 - A Ministerial sector reform retreat at La Campagne Tropicana
 - A Ministerial Breakfast Meeting at the Sheraton Hotel and Towers, Lagos, with Print and Electronic Segment Journalists covering the Tourism and Hospitality sectors -to promote optimised reporting of the sectors as economic sectors, rather than as recreation.
 - A Ministerial World Press Conference at the National Arts Theatre, Lagos; and

- A National Forum on Tourism Development in Nigeria, held from July 31, 2008 to August 1, 2008 at the Planet One Entertainment Centre, which included, as part of the Forum Programme, a Ministerial Roundtable with States Government Commissioners of Tourism.

Clearly, NESG's demonstrated commitment to the development of the tourism and hospitality sectors, and her committed partnership with the Federal and States Governments for sectoral reforms have been longstanding.

4. Today, the NESG, the Federal Ministry of Information and Culture, and all stakeholders are witness to the sad reality that the travel, tourism, and hospitality sectors were amongst the sectors most affected by the covid-19 pandemic worldwide, with estimated 45% job losses worldwide. The economics of these sectors is so intricately connected to many other industries and sectors, that the huge loss of income from core travel, tourism and hospitality sectors has had a massive multiplier effect across other ecosystems.
5. With over 7000 airplanes grounded for months worldwide in 2020 (and looming again for summer 2021 due to the spread of the new Delta variant of the covid-19 virus), the WTTC (World Travel and Tourism Council) estimated that over 50 million jobs would be lost in the travel, tourism and hospitality sectors as a result of the pandemic.
6. The urgent imperative for the holistic repositioning of the Tourism and Hospitality sectors in Nigeria is THE critical output expected from this forum, especially in the light of the humongous global financial/operational challenges faced by the sector operators in the wake of the unexpected and sustained countries-wide national lockdowns and consequential economic impact, occasioned by the onset of the rampaging covid-19 pandemic in 2020 and even in 2021, including massive jobs losses and loans defaults arising from the sustained shutdown of the entire sectoral ecosystem.
7. In Nigeria, while other economic sectors may have received the support of government, and risk management strategies emplaced to help navigate the impact of the Covid- 19 pandemic, the tourism and hospitality sectors in Nigeria have, admittedly, received some level of Government support, but not in the quantum envisaged by stakeholders. This situation could portend a major setback for the country during the global economic recovery period because most economies thrive better with the support of vibrant and profitable tourism and hospitality sectors. We urge government further action in this regard.
8. However, prior to the onset of the pandemic, the Nigerian tourism and hospitality sectors have been plagued with a myriad of challenges, including lack of needed reforms in policy, legislation, institutions, and human capacity development, the absence of comprehensive databases of operators, and even clear, identifiable sector value chains to properly reposition the operating industries as viable business operators in the national economy, as envisaged in many domestic and international benchmarking policy documents.

9. Globally, the sectors cannot compete optimally because they have not fully adopted mainstream best practices and initiatives in technological innovation and digital transformation, which have transformed other sectors to be smarter at the global level. NESG calls on the UN World Tourism Organisation (UNWTO) and the WTTC to rise to the occasion and coordinate the global repositioning of the sector.
10. This Forum seeks to provide the **neutral** and **sustained** platform for the continuous engagement of ALL stakeholders, including Governments at national and sub-national levels, private and social enterprise sectors, and development partners to foster sustained public-private dialogue with a view to harmonising concrete short, medium and long term sectoral reform strategies to be reflected in an envisaged **Framework of Action for the** sustainable and holistic repositioning of the sectoral ecosystem. Such repositioning is essential to mobilise the needed massive investment for accelerated sectoral resuscitation, that will result in the sectors contributing up to 12% of Nigeria's GDP by 2031.
11. In this wise, the critical roles of subnational Governments in achieving this sectoral national GDP contribution target are hereby acknowledged, and will be further espoused by H.E. the Chairman of the Nigerian Governors' Forum, and Executive Governor of Ekiti State, Dr Kayode Fayemi, when he takes the floor.
12. NESG thanks the Honourable Minister for Information and Culture, the Federal and States Legislators here present, the Ministry's Permanent Secretary and her team, all States Commissioners, sector operators, development partners, and other stakeholders here present for demonstrated commitment to the cause of repositioning the sectors as envisaged, and we look forward to the unfolding of robust sectoral forward and backward linkages as critical outputs of this Forum, to drive effective sectoral transformation in an era of reform.

Thank you all and God bless our country Nigeria

III. Goodwill Message by Mr. Andrew Brown, World Travel & Tourism Council

Thank you very much, and it is a pleasure to be here today in such an important event that is aiming to reposition Nigeria tourism and hospitality sector for sustainable growth and profitability. Thank you for inviting me.

Travel and Tourism is founded upon the people, the strength of their relationships, the goodwill and the win-win mentality. I hope that through discussions we shall be having here today that the foundation can be created for a prosperous future for Traveling and tourism in Nigeria. Pre-Covid 19, travel and tourism accounted for 330million jobs globally. Just let that sink in. In 2019 one out of 10 jobs across the world related to travel and tourism and this was anticipated to grow to 440million by 2030. And now, well, as a result of the pandemic, 62 million jobs had disappeared, which is 18% of the 2019 number. Although, we anticipate that this is actually larger as government protection claims, like here in UK, are still in operation. With this in mind, how many jobs do you think can be lost in Nigeria both as a number and as a percentage?

My name is Andre Brown, regional director at World Travel and Tourism Council here in London. The World Travel and Tourism Council or WTTC is a global body that represents private sector of Travel and Tourism. We were founded over 30 years ago to determine the economic impact of the sector, and has importance on 185 countries, 25 regions, and the world in its entirety. For example, last year as a result of Covid-19, the Travel and tourism sector lost 4.5 trillion US dollars equivalent to 49% compared to the year before. This was an 18 times larger impact than the global financial crisis had in 2007/2008. For context, the gloomy doom of the global GDP was in discourse in the world's media and that only reduced by 3.7%. This means that the Travel and Tourism was disproportionately impacted as a result of Covid-19. Looking at Africa on the continental level before highlighting how Nigeria performed in comparison. Africa experienced a similar result to that of the global sector with a 49% reduction of Travel and Tourism contribution to GDP and lost 83billion US dollars. Unfortunately, in terms of employment and jobs, there was a significant off index across the continent with loss of 7.2million jobs for 29%.

At the country level, in Nigeria as at last year, the Travel and Tourism contributed 11billion US dollars to the economy. However, compared to the 2019 numbers, there was a loss of 7 billion US dollars that simply didn't enter the Nigeria economy as a result of Covid-19. This is a 39% reduction. In terms of jobs, unfortunately, there was 770 thousand job loss equivalents to 23%. That is just the snippet of the data and research that we produce. You may be asking that "does WTTC produce economic impact for travel and tourism?" Well, with the backing of our members, presidents, chairs and CEOs of leading private sector organisations from across the world that covers many industries and every geography. We use the data to speak with one unified voice and to the government to communicate not only the important roles that our sector plays in their economies but also the messages/activities that the private sectors are calling for. These messages focus on three strategic priorities

1. Security and Travel Facilitation
2. Sustainable growth
3. Crisis Preparedness

Given the focus of conversation today, I will like to take the opportunity to highlight two of the priorities that we at the WTTC feel can be a foundation upon which Nigeria Travel and Hospitality sector can achieve sustainable growth and profitability.

1. Crisis Preparedness
2. Sustainable growth

The first is that of crisis Preparedness which has been the most prominent across the last 18 months. During this turbulent time, WTTC, with the help of our members and experts, developed industry-specific health and hygiene protocols for global private sectors to implement. This encompasses 12 industries to operators to airlines, hostels, and everything in-between. And as a result, where and when private sectors organisations takes the steps to implement these protocols. This is recognised for the WTTC safe travel steps. This steps have been adopted by over 300 destinations around the world who have distributed it to thousands upon thousands for they supply stakeholders and local operators and not only to the public sector that we are, already, but also to instil confidence in the consumer that we are aiming to welcoming back to our communities that we have put in place at the forefront, their health and safety as a top priority and look forward to create human connection once again and putting people at the heart of travel and tourism. I encourage those at the conference here today and the wider Nigeria Travel and Tourism sector to implement these protocols and adopt the safe travel steps as a stepping stone that highlight to the international tourism sectors that their health and safety are of the utmost importance when they are looking to travel to Nigeria.

The second priority and one which we believe would lead the Nigeria travel tourism sector forward is that of sustainable growth. As said by the wider private sector, and our members, sustainable growth refers to not only climate and environmental action which always need to be at the fore front of every discussion but also take into consideration the ways that in which our sectors can grow that benefit everyone, communities, regions and the environment in a harmonious way. Let's take a moment to consider one very unique aspect in characteristics of travel and tourism that I think should be a part of all your discussions going forward. Did you know that women account for 54% of all jobs in Travel and Tourism? With this in mind, and under the scope of sustainable growth, we encourage and advocate for every and all initiatives and activities sit out to facilitate tourism growth to recognise the importance of an equable environment that enables women to be describe as leaders, entrepreneurs, and innovators. Additional, an equally important aspect the global private sector are calling for to achieve sustainable growth and that we at WTTC have produced results and insight on include: eradicating both illegal wild-life trade and human trafficking throughout our sector plus the importance of establishing an open and collaborative discussion between the public, private and communities so that all stakeholders are aligned and motivated to facilitate sustainable actions and develop pathway forward for employment and to magnify this positive social impact that travel and tourism has on communities and livelihood.

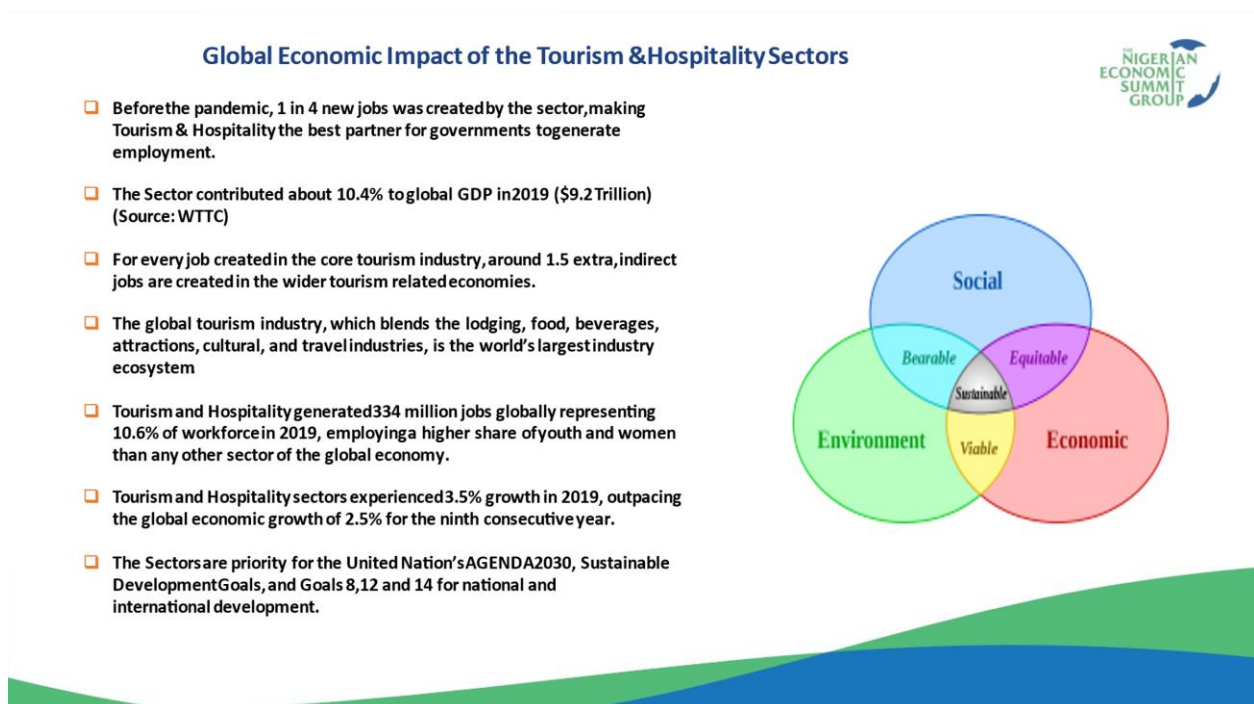
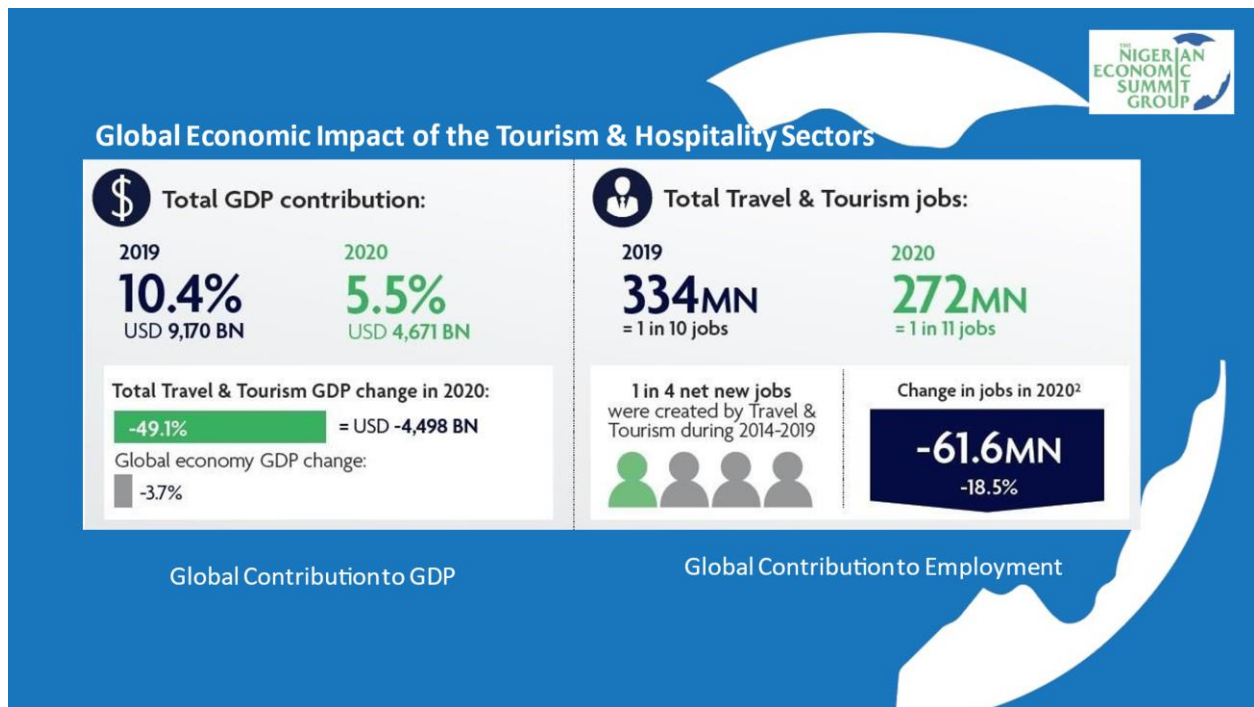
Now before the break, I will like to leave you with a question, a rather simple yet complete questions as we set up a pathway forward for Tourism and Hospitality in Nigeria.

What is it that you want from Travel and Tourism? Beyond the monument, international arrivals, have this in mind that Travel and Tourism is a sector that enables socio-economic development, that create

jobs and significant positive social impact. Travel and Tourism provides unique Opportunities for all no matter your background, ethnicity, gender, race or age. It is a sector that leads to peace, it is unlike any other and gives back to communities, to women and minorities that can kick start a career that can take anyone anywhere. Here in the conference, the opportunity is in front of you. Yes, 2020, we have a pandemic that devastated the sector, yes, over 770 thousand jobs has been lost across Nigeria, but that now create opportunities to start something new. Travel and tourism would bounce back; it might not be the same, and that is because what you set out in the conference today will shape its future.

Good luck.

IV. **Presentation of the “ROADMAP FOR OPTIMIZED TOURISM AND HOSPITALITY SECTORS IN NIGERIA” by the Toursim and Hospitality Industries Thematic Lead, Mrs. Ngozi Ngoka (Attached as Addendum)**



Definitions



TOURISM

"Tourism comprises 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."
- United Nations World Tourism Organization (UNWTO)

TOURISTS

- Persons travelling for tourism are called "tourists".
- Persons traveling for pleasure, for health, religion, entertainment, sports, sightseeing, etc.;
- Persons traveling in a representative capacity of any kind.
- Persons traveling for business reasons.

Day Trippers (Visitors)

A person who goes on a journey or excursion that is completed in one day. There is no layover.
A day-tripper is also known as an excursionist.

TOURISM INDUSTRY

Tourism industry can be defined as the set of industries which provide infrastructure, products and services and facilitate travelling for different purposes and to places of leisure and business interests.

Forms of Tourism

There are three basic forms of tourism: domestic tourism, inbound tourism and outbound tourism.

Domestic tourism refers to activities of a visitor within their country of residence and outside of their home (e.g. a Nigerian visiting the part of Nigeria).

Inbound tourism refers to the activities of a visitor from outside of country of residence (a German visiting Nigeria).

Outbound tourism refers to the activities of a resident visitor outside of their country of residence (e.g. a Nigerian visiting a overseas country).

These can be combined in various ways to derive the following additional forms of tourism.

Internal tourism: Internal tourism comprises domestic tourism and inbound tourism, that is to say the activities of resident and non-resident visitors within the country of reference as part of domestic or international business trips.

International tourism: International tourism comprises inbound tourism and outbound tourism, that is to say the activities of resident visitors outside the country of reference, either as part of domestic or outbound business trips and the activities of non-resident visitors within the country of reference on inbound business trips.

National tourism: National tourism comprises domestic tourism and outbound tourism, that is to say the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound business trips.

Types of Tourism

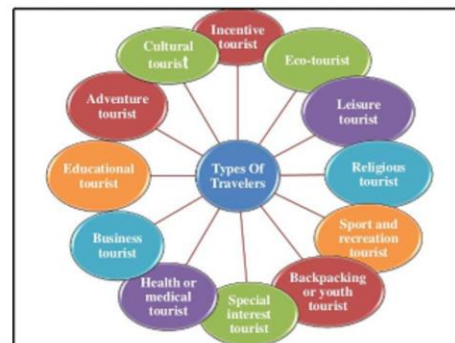


Personal

- Holidays, Leisure and Recreational
- Visiting Friends and Family
- Concerts, Plays, Movies, Shows
- Sports (watch football, wrestling, tennis, golf, etc.)
- Parties (Weddings, Funerals)
- Education and Training
- Health and Wellness
- Religion/Pilgrimages/Culture/Heritage
- Shopping
- Transit
- ETC

Business/Professional

- Meetings, Incentives, Conferences, and Exhibitions (MICE)
- Participating in Professional Sports, entertainment, Movie, Arts and Activities
- Formal and Informal Job Training Courses
- ETC



CORE COMPONENTS OF THE TOURISM INDUSTRY

TRAVEL

The activity of moving between different locations often for any purpose but more so for leisure and recreation (UNWTO, 2020)

ATTRACTIONS

These could be purpose-built structures, activities, events, heritage/cultural sites or places that are used purposely and intentionally to attract tourists to a particular area. E.g., Museums, Concerts, Coronations, Event Centers, Theme Parks, Zoo, Sports, Entertainment, Etc.

An attraction becomes a tourist attraction when a tourism system is created to designate and elevate it to the status of a tourist attraction.

HOSPITALITY

Hospitality is the friendly and generous reception, treatment, and entertainment of guests, visitors or strangers. The hospitality industry consists of two major sectors:

- **Accommodation:** hotels, resorts, bed & breakfast, camps, motels, Airbnb, etc.
- **Food and beverages:** Restaurants, fast food, cafes, bars, catering and event management, etc.

Relationship between tourism, Hospitality and Travel Sectors

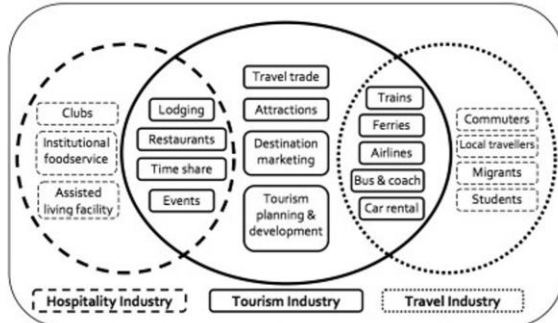
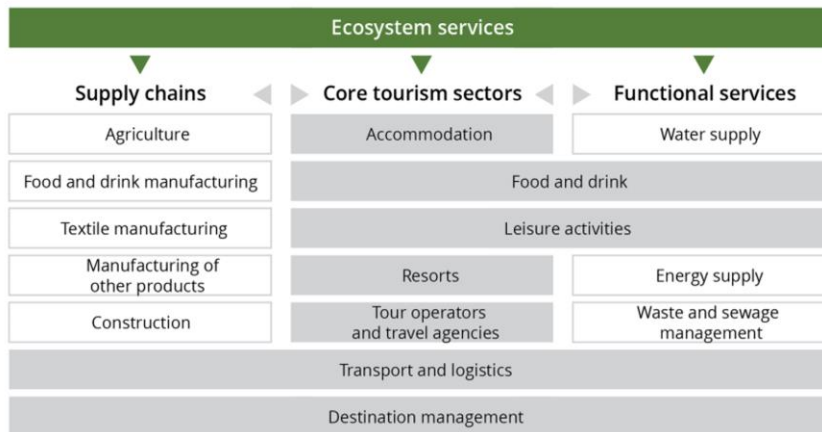
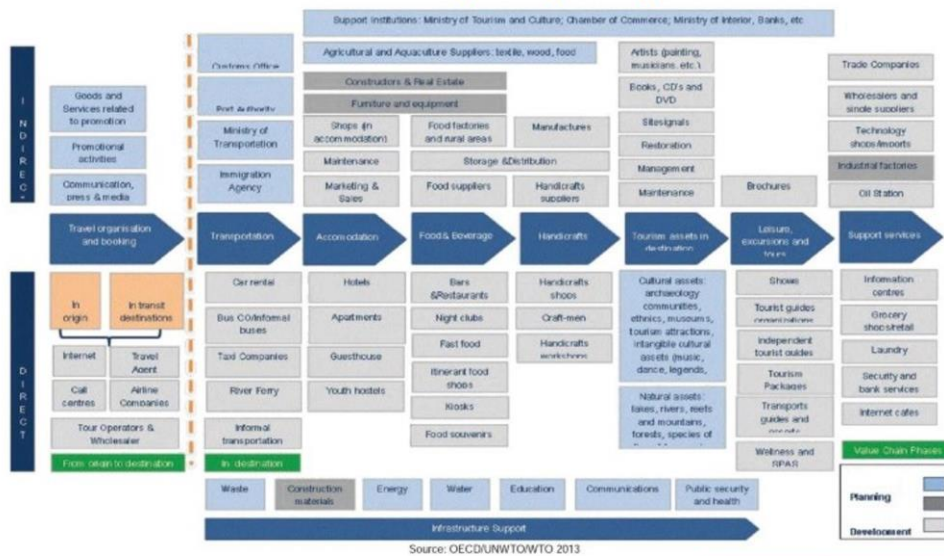


Figure 2: The relationship between the tourism, hospitality and travel industries. Source: Adapted from Pizam (2009).

The Tourism and Hospitality Ecosystem Services



Tourism & Hospitality Ecosystem



Key Drivers for the Tourism & Hospitality Sectors



- INCOME growth
- Travel AFFORDABILITY
- Availability of more leisure time (National Holidays & International HOLIDAYS)
- Social, cultural, sports, entertainment and other recreational EVENTS
- Tourist ATTRACTIONS & DESTINATIONS
- Marketing, Communication and Technology
- Destination Image
- Innovation & Technology
- INFRASTRUCTURE development, connecting and bringing remote and more destinations on travel map.
- Hospitality industry STANDARDISATION
- Growth in Meetings Incentives Conferences & Exhibitions (MICE) sector
- Tourism Friendly and purpose driven VISA POLICY
- Security and Political Stability
- Ease of Doing Business

Economic Impact of Largest Tourism and Hospitality Economies in the World 2019-2020



LARGEST T&T ECONOMIES - 2019 VS. 2020 RANKINGS

Total contribution to GDP 2019: (US\$, real 2020 prices and exchange rates, billions)

1	United States	1,869.7
2	China	1,665.6
3	Germany	393.1
4	Japan	373.0
5	United Kingdom	305.0
6	Italy	269.8
7	France	240.5
8	Spain	202.1
9	India	191.3
10	Mexico	175.6
11	Australia	149.1
12	Brazil	115.7
13	Canada	111.6
14	Thailand	106.5
15	Netherlands	101.6
16	Philippines	90.0
17	Saudi Arabia	79.2
18	Turkey	77.6
19	Russia	75.5

Total contribution to GDP 2020: (US\$, real 2020 prices and exchange rates, billions)

1	United States	1,103.7
2	China	667.2
3	Japan	234.9
4	Germany	208.8
5	Italy	132.2
6	France	123.2
7	India	121.9
8	United Kingdom	115.0
9	Mexico	91.2
10	Australia	81.4
11	Brazil	78.0
12	Spain	75.4
13	Netherlands	64.6
14	Philippines	52.8
15	Canada	52.4
16	Saudi Arabia	48.5
17	Thailand	41.7
18	Russia	40.1
19	South Korea	39.9

Countries most reliant on Travel and Tourism as a percentage of GDP



COUNTRY	2019 % of GDP	2020 % of GDP
Macau	83.9%	43.4%
Aruba	69.2%	44.0%
St Lucia	68.1%	28.7%
Maldives	52.6%	29.4%
St Kitts and Nevis	52.0%	22.0%

GLOBAL ECONOMIC IMPACT OF COVID 19 PANDEMIC ON THE TOURISM AND HOSPITALITY SECTORS 2019-2020 -WTTTC



The Americas



Asia-Pacific



Europe



Africa



Middle East



GLOBAL ECONOMIC IMPACT OF COVID 19 PANDEMIC ON THE TOURISM AND HOSPITALITY SECTORS 2019-2020 (Summary)



- ❑ Loss of almost US\$4.5 trillion in 2020,
- ❑ Contribution to GDP dropped 49.1% compared to 2019; (relative to a 3.7% GDP decline of the global economy in 2020)
- ❑ In 2019, the Travel & Tourism sector contributed 10.4% to global GDP; a share which decreased to 5.5% in 2020
- ❑ In 2020, 62 million jobs were lost, representing a drop of 18.5%, leaving just 272 compared to 334 million in 2019.
- ❑ The threat of job losses persists as many jobs are currently supported by government retention schemes and reduced hours.
- ❑ Domestic visitor spending decreased by 45%, while international visitor spending declined by an unprecedented 69.4%.

Source: WTTTC's latest annual research for Tourism and Hospitality Sectors.

How Key Countries Sustained and Revived the Tourism and Hospitality Sectors

- ❑ Focused Initiatives to support the Sector by introducing policy measures which provided financial relief to suffering businesses in the form of economy-wide stimulus packages, often including some liquidity injections and fiscal relief (e.g. through loans, long tax holidays or postponements; guarantee schemes)
- ❑ Governments Provided crucial and timely data and guidance on how to react to rapidly evolving regulations.
- ❑ Engaged with Industry Associations and Stakeholders to produce a post pandemic recovery document for the tourism and hospitality sectors
- ❑ Synergy & co-operation between the tourism & hospitality, environment and the health sectors to support the containment effort of governments.
- ❑ Supported the private sector to develop Digital solutions that created 'live remote' tourism and/or virtual tourism experiences
- ❑ Suspension of interest and loan payments for entrepreneurs in the tourism and hospitality sectors for one year.
- ❑ Postponement of payments of interest and/or principal of loans by companies and self-employed workers affected by the crisis.
- ❑ Measures to support the troubled airlines
- ❑ Workers in the tourism, hospitality, culture, entertainment, film and audio-visual sectors received special allowances
- ❑ Emergency fund for culture, entertainment and tourism businesses. Also for live entertainment, cinema and audio-visual. EUR 130 million to support operators, authors and performers affected by the measures adopted for the COVID-19 emergency and for investments aimed at revitalising these sectors.
- ❑ Various measures to support Airlines including bailouts



Where Are We In The Tourism And Hospitality Sectors In Nigeria?

Nigeria: Tourism and Hospitality Economic Impact & Statistics 2019-2020^(WTTQ)



Where are we in The Tourism and Hospitality Sectors in Nigeria? (1)



- ❑ In 2005, a Nigerian Tourism Master Plan was developed in partnership with the United Nations World Tourism Organization (UNWTO); United Nations Development Program (UNDP) and Tourism Development International (TDI) with the aim of strengthening the institutional capacity for the Tourism Sector in Nigeria.
- ❑ The National Tourism Policy was formulated and the final draft of the master plan was approved and launched in January 2016. Policy implementation has been undertaken.
- ❑ In 2008, the erstwhile Federal Ministry of Tourism, Culture and National Orientation collaborated with the NESG to host a National Forum on Tourism Development in Nigeria from July 31- August 1, 2008 resulting in the establishment of a strategic partnership on "Strategies for Catalyzing the Development of the Tourism Sector in Nigeria."
- ❑ The FGN established and commenced implementation of the Special Package of Incentives for 5star hotels of 100 Rooms and Above, which granted duty waivers for all importation for this category of hotels. (Domiciled at the FMFBNP)
- ❑ Unfolding of sub-national tourism sector masterplans by some State Governments eg: Lagos, Osun, Ekiti and Plateau amongst others.
- ❑ Exponential growth of restaurants, bars, fast foods and confectionary businesses in the past decade leading to the establishment of Association of Fast-food & Confectioners of Nigeria (AFFCON), now renamed Restaurants & Food Services Proprietors of Nigeria (REFSPAN) worth more 1trillion naira with the fast food segment accounting for more than N250 billion (AFFCON, 2016)
- ❑ Exponential growth of the Hospitality Industry in the last decade/ entry of new international hotel brands into the Nigerian market eg, Marriott, African Sun, Accor, Bon Hotels, Golden Tulip, Hilton, Radisson, Fairmont, George.
- ❑ FOREX availability challenges for outbound travelers arising from the recent FGN directive on BDCs

Where are we in The Tourism and Hospitality Sectors in Nigeria? (2)



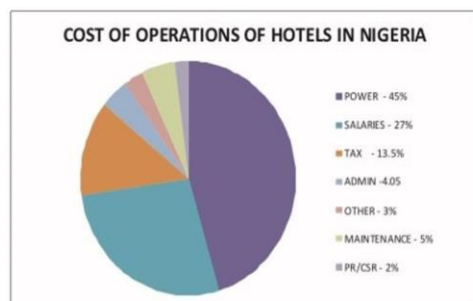
- ❑ Launch of new domestic airlines
- ❑ Launch of new visa policy which includes visa on arrival.
- ❑ Various tourism bills at the National Assembly: NIHOTOUR, NTDC, ITP, NANTA
- ❑ Introduction of annual Festivals and carnivals by several state Governments. The annual Calabar Carnival was once listed in the Guinness book of records as the longest street party in the World.
- ❑ The FGN has constituted the NIGERIA VISION 2050- a Committee of Experts who will draft a new economic policy for Nigeria. The committee which has submitted its interim report, has 26 Technical Working Groups including one for Culture, Creatives, Tourism and Hospitality.
- ❑ The exponential growth in the Creatives, Culture and Entertainment Sectors in the past 20 years.
- ❑ Federal Executive Council (FEC)'s recategorization of Sports from Recreation to Business will bring in new tourism and hospitality streams as sporting events businesses expand.
- ❑ Absence of value chain studies of various tourism and hospitality products in Nigeria at subnational/product levels.
- ❑ "Heart of Africa Project" of the Federal Ministry of Information and Culture (FMIC)
- ❑ "Fascinating Nigeria" project of the Federal Ministry of Information and Culture (FMIC)
- ❑ Increased Contribution of Tourism and Hospitality Sectors to National GDP
- ❑ Technical Cooperation Agreements on Development of Tourism and Hospitality between Nigeria (FMIC) & Some African Countries.
- ❑ The Federal Ministry of Information and Culture (FMIC) has undergone institutional reform of its governance framework, separating the Department of Tourism into two departments respectively for domestic tourism and international tourism, as well as establishing a Department of Entertainment and Creative Services for the creative industries.
- ❑ However, there are Insufficient transformative institutional reforms undertaken for the key parastatals of the FMIC to drive greater effectiveness as implementation agencies, particularly for NTDC and NIHOTOUR.

General Challenges For The Tourism And Hospitality Sectors in Nigeria



- ❑ Poor tourism infrastructure (not reflective of the Nigerian Integrated Infrastructure Masterplan - NIIMP)
- ❑ Lack of standardization and rating structure for the tourism and hospitality sectors.
- ❑ Lack of reliable statistical tourist and economic data & measurements
- ❑ Slow visa policy implementation protocol and passport issuance
- ❑ Unskilled workforce
- ❑ Hostile business environment/Excessive taxation & multiple tax structures by all tiers of government for tourism & Hospitality operators.
- ❑ Rising domestic insecurity nationwide (kidnappings, robberies, police brutality, banditry, cultist, etc);
- ❑ Disruption of food supply chain and road trips (for goods and persons) arising from widespread national insecurity
- ❑ High interest rate/Lack of adequate incentives for the sector
- ❑ Insufficient financial bailouts and fiscal palliative by Federal and State Governments for the Tourism and Hospitality Sectors to cushion the impact of Covid-19 pandemic.
- ❑ Insufficient sensitization by Government on available tourism attractions /potential, and on incentives available for the development of the sectors.
- ❑ Closure of most domestic tourism attractions, such as zoos, amusement parks, beachside entertainment (Kuramo/Bar Beach) etc
- ❑ Human and Institutional capacity reforms needed at sub-national levels especially LGAs
- ❑ No established Health/Covid protocols for the Tourism and Hospitality Sectors.
- ❑ High Operating Costs/ High cost of energy

Case study: Operating Costs/Multiple Taxation For the Hospitality Sector in Nigeria



Source: NHA's Secretariat

The above chart indicates a dramatic trend in the cost of operating hotels.

TAXES PAID BY HOTELS IN NIGERIA

1. Personal Income Tax (PIT)
2. Company's Income Tax (CIT)
3. Education Tax (ET)
4. Value Added Tax (VAT)
5. Industrial Training Fund (ITF)
6. Pension Contribution
7. Development Levy
8. Nigeria Social Insurance Trustfund (NSITF)
9. Consumption Tax
10. Gaseous Emission Tax
11. Environmental Tax / Waste Disposal Tax
12. Pay As You Earn (PAYE)
13. Tourism Development Levy.
14. Signboard / Signage Fee
15. Land Use Charge/Tenement Rate
16. Ground Rent
17. Mobile Advert Fee
18. Radio/TV Fee
19. NASREA – Environmental Audit Reports
20. Withholding Tax
21. Capital Gains Tax
22. Hotel Occupancy and Restaurant Fee.

Economic Governance Challenges For The Tourism And Hospitality Sectors in Nigeria



- ❑ Despite having a National Tourism Policy in place since 2005, there has not been any policy reform to bring the industry up to date with current best practices. The current policy is 16 years old, and should have been reviewed after 10 years.
- ❑ No national policy framework or legal framework ever put in place for the hospitality sector to drive sectoral growth in an orderly fashion, including adoption of best practice such as e-hospitality.
- ❑ Lack of a wholesome governance framework for both sectors, arising from the Supreme Court decision on the regulatory powers of the Federal Government in the Tourism and Hospitality sectors, as per the Exclusive Legislative List in the 1999 constitution.
- ❑ Absence of optimized and interactive websites and social media handles at sectoral public institutions at national and sub-national levels.
- ❑ Insufficient industry linkages to drive sectoral growth.
- ❑ Insufficient manpower and manpower training/re-training facilities
- ❑ Absence of tourism police to enhance security for tourists.
- ❑ Lack of effective collaboration between national and subnational governments (especially LGAs) to drive orderly development of the sectors.
- ❑ Insufficient marketing of Nigeria as a tourist destination.
- ❑ Absence of an institutional public-private dialogue platform for continuous engagement on industry issues.
- ❑ Pending completion of sectoral privatization program by the BPE

On the Bright Side... Opportunities



- Growing Diaspora market: due mostly to the efforts and successes of Nigerians in the diaspora and the positive image propagated by the popularity of Nigeria's Creative and Entertainment Sectors.
- Travel restrictions to many international destinations portends an opportunity for the country to grow domestic tourism and prevent capital flight.



- Ongoing initiatives, partnerships and discussions with:
 - ECOWAS Commission,
 - African Continental Free Trade Area AfCFTA,
 - AU Agenda 2063,
 - UN AGENDA 2030 (SDGs),
 - Nigerian Industrial Revolution Plan (NIRP)
 - Nigeria Vision 2050
 - Nigerian Economic Sustainability Plan (NESP),
 - Single African Air Transport Market SAATM), and Other regional development initiatives within Nigeria, such as the NDDC and similar regional development outfits.

Economic Community of West African States (ECOWAS)



ECOTOUR PLAN 2019-2029

In June 2019, the **Economic Community of West African States (ECOWAS)** Commission, adopted the **Ecowas Regional Tourism Policy (ECOTOUR)**. The policy is the roadmap for the implementation of ECOWAS Vision 2020 which aims to ensure a harmonious and viable development of tourism to create jobs for young people, increase private sector participation through the development of successful and sustainable businesses and thus contribute to the ECOWAS region's economic development.



Some areas for intervention are:

- the harmonization and co-ordination of tourism development policies, plans and
- programmes; regulations governing tourism and hospitality management
- activities; framework for tourism statistics and joint marketing of the region.
- the adoption of measures aimed at promoting investment in tourism and hotel
- management; promotion of the establishment in Member States of professional tourism and hotel management associations; development and optimum utilization of human resources for tourism in the region and the strengthening or establishment of regional tourism training institutions.
- Development of standards and control systems

AfCFTA/ AU AGENDA 2063

- ❑ **AfCFTA:** The African Continental Free Trade Area (AfCFTA) is a flagship project of the African Union to create a single market for goods and services by facilitating free movement of goods, persons, capital & services.
- ❑ With 55 countries participating, connecting 1.3 billion people with a combined GDP of \$3.4 trillion, it is the largest free trade area in the World in terms of number of participating countries.

7 Aspiration of Agenda 2063



- ❑ **Benefits of AfCFTA for the Tourism and Hospitality Sectors:**
 - Increase in number of Business & Leisure travelers to & within Africa
 - Increase in demand for Hotels, accommodation, restaurants and fast food chains. (In anticipation there is already an influx of international and African hotel and restaurant chains expanding into various parts of Africa)
 - Air, and Land transportation will be enhanced through the Single African Air Transport Market (SAATM) and provision of infrastructure. This will improve connectivity and make travel cheaper
 - Promote efficient immigration protocols which in view of visa-free travel for African tourists and more efficient visa protocols for non-African tourists.

- ❑ **AU AGENDA 2063:** At the Pan-African level, the potential of the tourism sector has been acknowledged in the African Union's Agenda 2063: the 10-year implementation programme, for example, specifically calls for a doubling of intra-African tourism, with eco-friendly coastal tourism to increase 20% with at least 10% of public revenues going to finance Community Development Programs (CDPs.)

United Nations Agenda 2030 (SDGs)

In the United Nations (UN) 2030 Agenda for Sustainable Development & the Sustainable Development Goals (SDGs), tourism has been included as targets in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production and the sustainable use of oceans and marine resources respectively.

GOAL 8: DECENT WORK AND ECONOMIC GROWTH



Tourism is one of the driving forces of **global economic growth** and currently provides for 1 in 11 jobs worldwide. By giving access to decent work opportunities in the tourism sector, society—particularly youth and women—can benefit from increased skills and professional development. The sector's contribution to job creation is recognized in Target 8.9 "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products".

GOAL 12: RESPONSIBLE CONSUMPTION AND PRODUCTION



A tourism sector that adopts sustainable consumption and production (SCP) practices can play a significant role in accelerating the global shift towards sustainability. To do so, as set in Target 12.b of Goal 12, it is imperative to "Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products". The Sustainable Tourism Programme (STP) of the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns (10YFP) aims at developing such SCP practices, including resource efficient initiatives that result in enhanced economic, social and environmental outcomes.

GOAL 14: LIFE BELOW WATER



Coastal and maritime tourism, tourism's biggest segments, particularly for Small Island Developing States' (SIDS), rely on healthy marine ecosystems. Tourism development must be a part of Integrated Coastal Zone Management in order to help conserve and preserve fragile marine ecosystems and serve as a vehicle to promote a blue economy, in line with Target 14.7: "by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism".

Where Do We Want To Be In The Tourism and Hospitality Sectors In Nigeria?

**Addressing the Challenges:
The Goal Of This Focus Group Forum**

**“Repositioning the Tourism and
Hospitality Sectors in Nigeria for
Sustainable Growth and
Profitability”**

Forum Objectives (1)



- ❑ Boost Nigeria's Tourism and Hospitality Industries' competitiveness in Africa by collaborating on initiatives under ECOWAS, AfCFTA, AU Agenda 2063, UN AGENDA 2030 (SDGs), Nigeria Vision 2050, Single Africa Air Transport Market (SAATM), Nigerian Economic Sustainability Plan (NESP) and Nigerian Industrial Revolution Plan (NIRP).
- ❑ Seek solutions to National and Regional Tourism/hospitality Risk Factors and conditions accentuated by the COVID-19 Pandemic, and advance recovery options.
- ❑ Interrogate tourism and hospitality sectoral operations in public enterprises and create a path for the privatisation and commercialisation of national tourism, hospitality, and cultural assets for optimal economic advantage.
- ❑ Create an enlarged Tourism Business Segment of the economy by harmonizing the activities of Sports, Creative/entertainment, hospitality sectors, travel/tour agents and other enablers.
- ❑ Determine how to improve Tourism Factor Conditions – Linear Transportation Connectivity of Tourism Centres, hospitality, infrastructure (NIIMP), manpower, training, and the role of Technology.
- ❑ Establish the value chain of the tourism and hospitality sectors at subnational/product levels, with a view to determining the diverse interventions required to leapfrog sectoral development.
- ❑ Conduct a complete overview of the economics of the tourism and hospitality sectors. Gain insight to the sector's Debt & Equity profile, Investment opportunities, blended financing, and conversations about grants.
- ❑ Research visitor safety, risk management issues and tourism/hospitality safety. Tackle the issues of crime and terrorism, and the role of the Police in tourism/hospitality sectors development and sustainability.
- ❑ Explore how rural communities in Nigeria could use their natural and man-made tourism products as economic development tools and simultaneously improve the quality of the lives of residents.
- ❑ Examine ways to increase the sector's contribution to Nigeria's GDP, reduce Capital Flight arising from outbound tourism and identify ways to promote domestic tourism and attract the vibrant and lucrative diaspora market (reverse tourism).
- ❑ Tackle the issue of statistics and data collection for the Tourism and hospitality sectors as a prerequisite for meaningful sector planning and development.

Forum Objectives (2)



- ❑ Examine the issues of Land, Environment, Security, Peace and Gender Mainstreaming in relation to the development of the sectors.
- ❑ Exponentially grow the tourism and hospitality sectors so as to contribute up to 12% of Nigeria's GDP by 2031.
- ❑ Examine the Legal, Financial, institutional, Structural and Policy Framework implications of the National Tourism policy and determine the requirements/conditions for its full implementation. This involves, amongst others, tackling head-on, the following political issues mitigating against the evolution of a Competitive National Tourism and hospitality Economy,
- ❑ National Tourism Capital Formation and Asset Development. Need for new initiatives for complete reform of the tourism and hospitality sectors as regards reform of policy, regulatory, institutional, governance, and industry self-regulation.
- ❑ Provide a platform for engaging sub-nationals and other private and social enterprise sectors to foster public-private dialogue with a view of harmonizing strategies for the Framework for investment mobilization in the Tourism and Hospitality Ecosystem.
- ❑ Articulate clear and concrete short and medium-term recommendations for the government, private sector, and other stakeholders to consider in accelerating sustainable growth and development in Nigeria's Tourism and Hospitality Ecosystem.
- ❑ Formulate sustainable financing schemes for sectoral development (with support from AfDB, AFREXIMbank, EBID, CBN, DBN, World Bank/IFC)
- ❑ Unfold tourism and hospitality industry technological innovations and digital transformations that are positively disrupting the development of both sectors and making them smarter sectors, especially as the world presently operates in a period of covid-19 pandemic.
- ❑ Agree on suitable and workable public-private dialogue platforms for continuous sectoral dialogue and effective implementation of the Forum outcomes and outcomes of subsequent initiatives to follow.
- ❑ Resolve Federal versus States Regulation of the Tourism and Hospitality Sectors, particularly licensing and standards setting.
- ❑ Drive inclusive growth in both sectors to achieve UN SDGs targets including gender and youth mainstreaming.

Expected Outcomes

- ❑ Establish the relationship framework that would be required to reposition the Tourism and Hospitality ecosystem in Nigeria through enhanced engagement of stakeholders, connecting government, regulatory agencies, private sector, development partners and social enterprise. (The Tourism and Hospitality Industries Working Group THIWG)
- ❑ Build the required public and private sector institutions critical for effective harnessing national, regional, continental and global development initiatives for sectoral development.
- ❑ Exponentially grow the tourism and hospitality sectors so as to contribute up to 12% of Nigeria's GDP by 2031
- ❑ Consensus building to mutually agree on a Framework of Action for holistic reform of the tourism and hospitality sectors for sustainable/inclusive growth and profitability (as envisaged in the benchmarking documents earlier outlined), and incorporating strategies for making tourism smarter through technological innovation and digital transformation consequently build human capacity in the sectors.



**How Will We Get To
Where We Want To
Be?**

Nigerian Economic Summit Group (NESG)



- “The Nigerian Economic Summit Group (NESG) is a Think-Tank organization that promotes sustainable growth and development in the Nigerian Economy using research-based advocacy methods. The NESG was incorporated as a not-for-profit, non-partisan organization with a mandate to promote and champion the reform of the Nigerian Economy into an open, private sector-led economy that is globally competitive on a sustainable basis.”
- The NESG is a neutral stakeholder convener across all socioeconomic sectors.



The Reform Strategy: 7- Step Approach



Collaborative Stakeholder Engagements

Policy Review/Formulation

Legislative Reforms

Institutional Reforms

Human Capacity Development

Implementation

Monitoring and Evaluation



Collaborative Stakeholder Engagements



Immediate Term- 0 to 6 Months

- ❑ Host Focus Group Forum on Tourism and Hospitality Sectors In Nigeria/obtain inputs for sector policy reform and development, (August 2021)
- ❑ Set up the **Tourism and Hospitality Industries Working Group (THIWG)** as a Public-Private Dialogue (PPD) and sector reform **platform**, Co-Chaired by the Public and Private Sectors, and the membership will be made up of critical stakeholders across the sectors' ecosystem including business membership associations. (September, 2022)

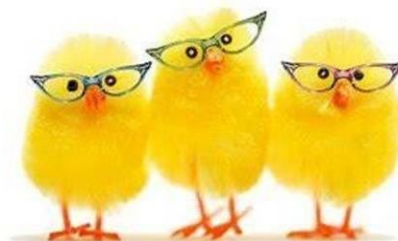


Policy Review/Formulation



ImmediateTerm- 0 to 4 Months

- ❑ Set up the National Tourism Policy Review Committee to be Co-Chaired by the Public and Private Sector. (September 2021)
- ❑ Set up the National Tourism Masterplan Review Committee to be Co-Chaired by the Public and Private Sector. (September 2021)
- ❑ Set up the National Policy Development Committee for the National Policy on Hospitality Sector to be Co-Chaired by the Public and Private Sector. (September, 2021)
- ❑ Submission of draft policy documents by the 3 committees to the HM FMIC/ HIWG (November 2021)
- ❑ Host Inter-Ministerial Technical Sessions (with identified MDAs) on Tourism and Hospitality Sectors' policy reform strategy including Technical session with the Nigeria Vision 2050 technical working group (TWG) on Culture, Creatives, Tourism and Hospitality. (CCTH) (February 2022)
- ❑ Host National Policy Dialogues for Stakeholders' validation (March, 2022)
- ❑ Dialogue/Engagement with the National Council on Tourism (March, 2022)
- ❑ Federal Executive Council (FEC) approval of the 3 new policy documents.



Legislative Reforms



Timeline: 0 to 9 Months (From September, 2021)

- ❑ Identify current legislative gaps in the Tourism and Hospitality Sectors based on earlier stakeholder engagements and agree on legislative reforms/interventions
- ❑ Directly engage with the National Assembly via the NASSBER Process for the harmonization and fast tracking of all Legislative/Regulatory reforms and enactment processes.
- ❑ Legal backing for domestication of international best practices in the management, standardization and administration of the Tourism and Hospitality Sectors (inclusive of pandemic protocols) to enhance the establishment of clear regulatory and standardization framework for all businesses identified in the Tourism and Hospitality Ecosystem



Institutional Reforms



Timeline: 2021/2022



- ❑ Identify all required institutional reforms at national and sub-national levels during stakeholder engagements.
- ❑ National Bureau of Statistics to establish a dedicated desk for collation/development of sectoral data/statistics/measurements.
- ❑ FMIC/THIWG to agree on a Framework of Action for instituting, financing and implementing the relevant required institutional reforms. (October 2021)
- ❑ Implementation of the agreed framework of action (2022)

Human Capacity Development



Timeline: 9 to 15 Months

- ❑ Identify all critical/ industry human capacity gaps in the public and private sectors and at national /sub-national levels (during stakeholder engagements) (September, 2021)
- ❑ FMIC/THIWG to agree on a framework of action for instituting, financing and implementing the relevant required institutional reforms. (October 2021)
- ❑ Implementation of the agreed framework of action (2022)
- ❑ FMIC/NTDC/NIHOTOUR and the Industrial Training Fund (ITF) are critical stakeholders to partner in these processes

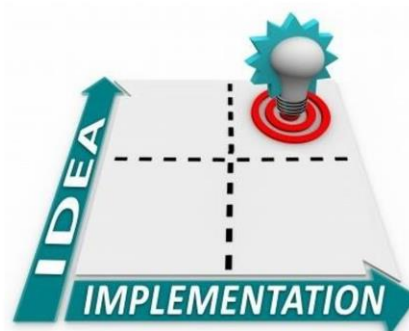


Implementation



Timeline: 12 Months

- ❑ Effective implementation of the approved protocols for post pandemic sectoral recovery.
- ❑ Unfold the 3 approved policy documents to the industry and the public: updated/approved National Policy on Tourism; Updated National Tourism Masterplan; New National Policy on the Hospitality Sector;
- ❑ FMIC/NESG/THIWG to submit/ secure approval of a collaborative implementation framework/protocol for effective implementation of the 3 policy documents.
- ❑ FMIC/NESG to ensure strict adherence to the collaborative implementation protocols for policy implementation
- ❑ Engagement in policy advocacy for industry sensitization on the 3 unfolded policy documents (FMIC/THIWG)
- ❑ FMIC/NESG to host a Tourism and Hospitality Investment Forum to match investors with investment opportunities/funding models for the sector, with support from AfDB, Afreximbank, EBID, CBN, DBN, World Bank/IFC, UNWTO and Banker's Committee.
- ❑ NESG/FMIC/THIWG to ensure that all reform segments and industry practice reflect current global technological and digital innovations in the industry.



Monitoring and Evaluation



Timeline: 12 to 18 Months

- **Develop a responsibility matrix** to ensure all stakeholders are accountable for diverse activities in the Frameworks of Action.
- **Develop a value realization blueprint** to ensure that intended benefits, agreed actions and key performance indicators are accurately tracked.
- **Agree on periodic fora** to discuss initiatives and track implementation progress of the Frameworks of Action.

The Tourism And Hospitality Industries Thematic Group (THITG)



The THITG is one of the three thematic groups of the *Tourism, Hospitality, Entertainment, Creatives and Sports Industries (THECS)* Policy Commission of the Nigerian Economic Summit Group (NESG) which facilitates the adoption of various Nigerian Economic Summit (NES) recommendations with a view to fast tracking growth and development.



THITG Members hip



Membership of the THITG consists of changemakers in the public/private/other sectors, who understand the business of tourism and hospitality and significantly contribute to the effective implementation of the NESG/THITG game-changing reform programs and strategies for the transformational repositioning of the sectors as viable and integral business segments of the Nigerian economy. Membership includes:



- Private Sector operators in the Tourism and Hospitality Sectors
- Representatives of Corporate Tourism and Hospitality Organizations
- Investors with interests in the Tourism and Hospitality Sectors
- Representatives of tourism and hospitality sector / business membership organizations
- Development partners/multinationals NGOs
- Practitioners in the services enterprises that are part of the Tourism and Hospitality value chain- Sports, Entertainers, MICE, religious organizations, etc.
- Custodians of Heritage/historical sites, Museums, Industrial Farmers, etc.
- NESG Bridge fellows with interest in the Tourism and Hospitality Sectors
- Representatives of relevant Ministries, Departments and Agencies of Governments at National and Sub-National levels.



THITG Main Work Team

1. Ngozi Ngoka	Thematic Lead
2. Amaka Amatokwu - Ndekwe	Member
3. Nnena Fakoya-Smith	Member
4. Victor Lawson	Member
5. Lola Udabor	Member
6. Chibuzor Onyema	Member
7. Olaolu Akingbola	Member
8. Emeka Kelechi Agina	Member
9. Usman Alabi	NESG Anchor
10. Ewomazino Omomadia	NESG PPD PC Support



DR IKENNA NWOSU
POLICY COMMISSION FACILITATOR



V. **Presentation by Dr. Ifeoma A. Anyanwutaku (Mrs.) Permanent Secretary, Federal Ministry of Information & Culture – “TOURISM AND HOSPITALITY SECTORS AS CATALYSTS FOR NIGERIA’S ECONOMIC RECOVERY”**

Introduction

Tourism is a socio-cultural and economic phenomenon that entails the movement of people to places outside their usual environment for either personal or business purposes. It involves rest and relaxation, sports, cultural exchanges, shopping, etc, depending on individual taste. It is a quiet revolution that has gradually swept through the world, in both developed and undeveloped nations in quest for comfort and pleasure through the hospitality sector whose business is helping people to feel welcome, relaxed and to enjoy themselves.

September 27 is celebrated as World Tourism Day every year, the purpose of which is to raise awareness of the role of tourism within the international community. Nigeria will be joining the rest of the member states of the UNWTO in commemorating the event.

Tourism and Hospitality Sectors are one of the highest employers of Labour in the World. But with the advent of the Covid-19 pandemic, the sectors have been among of the worst hit. However, as the pandemic is gradually being addressed and restrictions easing out globally, the industry is gradually bouncing back with the re-start of local, regional and international travels.

Demand or Tourism

Tourism should be viewed as an internationally traded service industry with tremendous growth opportunities for the Nigerian economy. It is a multi-dimensional economic force which involves the business of transportation by land, sea and air, communication, food, hospitality services, etc., that money can buy for the comfort and happiness of the fun seeker. Such tourist activities generate a lot of revenue to the host, thereby enriching the government through the various forms of taxation.

The development of the tourism and hospitality sectors has been rapid and widespread in the last half century due to the increased number of travelers and tourists. The sectors are making heavy investments in new facilities for already existing hotels, including more parking areas, swimming pools, and new buildings with larger guest rooms being constructed to accommodate tourists.

The United Nations World Tourism Organization – UNWTO (1998) estimates that the world hotel room inventory grows by about 2.5 percent per annum.

TOURISM AND HOSPITALITY SECTORS AS CATALYSTS FOR NIGERIA’S ECONOMIC RECOVERY

- The Tourism and Hospitality Sectors remain, undoubtedly, the major catalysts in Nigeria’s economic recovery. This is premised on their economic, social-cultural and environmental impact on the society which include the following:

- In view of Nigeria's dwindling revenues from the oil and gas sector occasioned by drastic fall in the price of oil in the world market coupled with illegal bunkering and Niger Delta militancy, the Tourism and Hospitality sectors provide a sure avenue for diversification of the economy.
- Globally, tourism has become an important policy tool for community and regional development in many developed and developing countries.
- Tourism has significant potential to influence and change the utilization of Nigeria's abundant natural and cultural resources.
- The sectors provide new opportunities, employment, economic benefits to local communities and promote the inflow of foreign direct investment.
- Tourists' spending provides foreign exchange earnings for the country.
- The activities in the sectors motivate to practitioners to aim for global standards.
- Globally, tourism has become an important policy tool for community and regional development in many developed and developing countries.
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- Tourists' spending provides foreign exchange earnings for the country.
- The activities in the sectors motivate to practitioners to aim for global standards.
- Tourism and Hospitality sectors provide accommodation for visitors, food and beverage servicing activities that provide a source of livelihood for many Nigerians.
- Tourism adds to the consumer population, as tourists for a short period of time do almost all the things, and consume most of the services and products which the country's indigenous population do. Tourism and hospitality activities, therefore, create more demand, spread demand across industries, and boost more economic activities.
- Tourism and hospitality sectors induce more consumption and greater demand for local food and craft.
- Tourism engenders country's wholesome development and global connectivity.
- The activities of the sectors promote transfer of new technologies.
- They encourage cultural exchanges.
- They encourage improvement in infrastructure and living standards.
- They constitute a source of foreign exchange earnings.

TOURISM POTENTIALS:

- Nigeria has all it takes to drive Tourism to its peak, given her rich natural and cultural resources.
- However, in recent times, the tourism and hospitality industries have been adversely affected by the Covid-19 pandemic.
- Even with its great tourism potentials, the country has been challenged to implement realistic approaches for the effective utilization of its tourism potentials, particularly with regard to its

importance as a source of revenue generation, source of livelihood for the rural communities, youth empowerment and community development.

- Nigeria's laudable tourism potentials and the agreeable climatic conditions yield great dividend to the government, operators of the hotel industry, tour operators, and other auxiliary tourism enterprises in the country.
- However, this dividend occurs only in a short-term due to lack of tourism-related activities all year round, hence the hotel industry suffers from seasonality in terms of patronage and revenue generation. This affects employment as most hotel workers are usually laid off during off peak periods. If these issues persist and are not addressed, the tourism and hotel industries will continue to struggle for survival. This situation calls for collective effort towards the development of the hotel industry so that tourism can thrive and revenue generation will be consistent.

CHALLENGES OF TOURISM IN NIGERIA

- Poor infrastructure – issues of poor road networks, incessant power failures, etc.
- Terrorism, insurgency, kidnapping, banditry and other security challenges.
- Misrepresentation of Nigeria's image abroad.
- Covid-19 pandemic.
- Dearth of proper data / statistics.
- Inadequate investment and funding.
- Air travel bottlenecks, etc.

PROMINENT NEGATIVE EFFECTS OF TOURISM

- Exploitation of cultural resources.
- Considerable socio-cultural related impacts.
- Environmental degradation.
- Overcrowding.
- Public Health issues.
- Illegal Migration.
- Prices increases in local shops as tourists are often wealthier than the local population.
- Inflation, etc.

TOURIST CHALLENGES IN THE HOSPITALITY SECTOR:

The problems which tourists may experience in the hospitality industry range from poor attitude of staff, lack of efficient facilities, unskilled staff among others.

The poor attitude of hotel staff and poor service delivery in the hotel industry in most developing countries discourage fun seekers and tourists to stay longer periods in the place of visit.

RECOMMENDATIONS:

It has become necessary to provide solutions that can bring about the amelioration of the problems in the tourism and hospitality industries, hence as follows:

- Institution of palliatives for the sectors, by way of endowment funds, stimulus packages, tax incentives, etc.
- Emphasis on domestic tourism and encouraging Nigerians to think home and develop interest in our local recreational activities.
- The need for the relevant government agencies to ensure proportionality in charges for goods and services in accordance with the standard of hotel.
- Building capacity of hotel workers who require update of knowledge and skills in modern hospitality services to handle the influx of tourists. Hotel operators should consider education and training of their workforce, and should take the opportunity provided by the National Institute for Hospitality and Tourism (NIHOTOUR) – the flagship training institute for various categories of staff in
- Nigeria's Tourism and Hospitality sector. Alternatively, they can go for new, qualified competent personnel in the labour market.
- Hoteliers should be advised by the right body to reduce hotel charges during off-season periods. This would act as an incentive and encourage tourists to visit during off peak season especially during weekends.
- The relevant government agencies should be conducting quarterly inspections of all the tourist attractions and hotel establishments in the country. This will help maintain a high standard of services and create a conducive environment for tourists.
- May I advise the Nigerian Economic Summit Group (NESG) to engage all the relevant tourism and hospitality industry stakeholders such as Nigerian Tourism Development Corporation (NTDC), National Institute for Hospitality and Tourism (NIHOTOUR), National Council for Arts and Culture (NCAC), National Commission for Museums and Monuments (NCMM) and all relevant business membership associations, in robust discussions to brainstorm on the way forward, in order to advise Government to make an informed decision on how to reposition the Hospitality and Tourism sectors as catalysts for economic recovery.
- Government should interface with the private sector to intensify the marketing strategies of tourism sites/destinations. This will boost Nigeria's tourism potentials, thereby increasing revenue generation and the country's GDP, which would in turn lead to economic recovery and diversification.
- As some of the laws governing the Sectors are considered to be at crossroads, Government should put in place the necessary machinery to review these laws holistically, in order to facilitate the seamless operation and growth of the sectors.

CONCLUSION

Tourism and Hospitality Sectors cannot thrive without the political will of government. For these sectors to achieve meaningful development and to rightfully occupy their pride of place on the ladder of the nation's economic indices, there is need for an effective and efficient inter-agency collaboration. The need for proper infrastructure, security, communication system and others beckon for the tourism and hospitality sectors' potentials to be met and be achieved. This will systematically elevate Nigeria's economy.

PRAYERS

I want to specifically implore the support of NESG to: -

- Resuscitate the Presidential Council on Tourism (PCT). This will provide the necessary political will required for the development of the sector.
- Establish the Tourism Development Fund as recommended by the National Tourism Development Master Plan because tourism development is capital intensive.
- Harp on the review of the governing laws affecting the sector.
- Establish a Tourism Convention Bureau which would be bringing in international conferences to Nigeria.
- Establish a Tourist Guide company for the country.

VI. Session Closing Remarks by Engr. Nebeolisa Anako, Permanent Secretary, Federal Ministry of Youth and Sports Development

Protocol

- His Excellency, Dr. Kayode Fayemi, Executive Governor of Ekiti State and Chairman Nigerian Governor's Forum
 - Mr. Lai Mohammed, Honourable Minister of Information and Culture
 - Distinguished Chairmen of the Senate and House of Representatives Committees on Tourism, and other States Legislators
 - The Permanent Secretary, Federal Ministry of Information and Culture, Federal Republic
 - Honourable Commissioners of Tourism from the Federating States Government of the Federal Republic of Nigeria and the Federal Capital Territory, Abuja
 - Heads of Ministries, Departments and Agencies of Government
 - All Resource persons: Speakers, discussants, Moderators and the likes
 - Special Guests here present
 - Captain of Industries/Organized Private Sector bodies and operators
 - Operators, business membership organizations and labour unions in the tourism and hospitality sectors in Nigeria and beyond
 - Development Partners, Members of the International Community and the Diplomatic Corps
 - Gentlemen of the Press
 - Distinguished Ladies and Gentlemen
-
1. On behalf of the Members of the Steering Committee of the Tourism, Hospitality, Entertainment, Creative and Sports Industries Policy Commission (THECS PC) of the Nigerian Economic Summit Group, I am pleased to thank you all for attending the Opening Ceremony of the Focus Group Forum on the Tourism and Hospitality Sectors in Nigeria; themed "Repositioning Nigeria's Tourism and Hospitality Sectors for Sustainable Growth and Profitability". It has been an exciting event. On behalf of the Chairman Organizing Committee and all the members, I want to acknowledge the commitment of all dignitaries from various field of endeavours, whose involvement in this webinar would no doubt facilitate the alignment of all key stakeholders and establish necessary synergy between relevant agencies to reposition the tourism and hospitality sectors for sustainable growth, development and profitability.
 2. In this Covid-19 era and associated lockdowns and global economic downturn, the Tourism, Hospitality, Entertainment, Creative and Sports Policy Commission Sector is the veritable tool to re-start national economies and interaction amongst people. The Federal Ministry of Youth and Sports Development has played vital roles in this regard, opening up the socio-economic space in the country through various sporting events. These include the Principal Cup held nationwide with finals at the Moshood Abiola Stadium, National Sports Festival in Benin, Edo State where over 6,000 athletes from all states of the Federation participated; the recently concluded Tokyo 2020 Olympic Games, and the Paralympic Games whose pre-games camping has already commenced.

3. As you could see from the Programme of Events, our major assignment commences shortly; and various sessions such as Cross-cutting Industry Governance, Industry Need Assessment, Operational Challenges, Collaborative Implementation Framework and Legislations Required for the Optimal Operation of the Tourism and Hospitality Sectors in Nigeria would be exhaustively discussed with a view to building a consensus to turn around the Tourism and Hospitality Industries.
4. It is my hope, that the outcomes of this conference would reposition the tourism and hospitality sectors in Nigeria to actualise its full potentials, open up employment opportunities for our growing youth population and contribute to National development.
5. Once again, I appreciate everyone who contributed in one way or the other to make today's event a success. Your contributions and sacrifices towards the actualisation of the objectives and goals of this task are not taken for granted. Thank you and God bless you
6. On this note, Ladies and Gentlemen, we have come to the closing session of the opening ceremonies of this great event. I wish you all very fruitful deliberations when the main session resumes.
7. Stay blessed.

VII. Forum Wrap-Up and Next Steps by Dr. Ikenna Nwosu, Facilitator THECS Policy Commission

Thank you very much Dr Ngozi for a very fantastic session, thank you all the resource people, the commissioners, private sector players and other heads.

Now my responsibility is to read out the next steps and wrap up the entire event. So basically, having thanked all of you I would like to focus on the next step rather than the whole wrap up. I would start with the motile, lateral statement from the world travel and tourism council, there are three important priorities which should lay the foundation for Nigeria to sustainably grow her tourism accountability sectors in view of the impact of Covid that made us lose a lot of money and underdevelopment of the sector.

First is crisis preparedness. So one of the next steps we need to take is that Nigeria needs to develop protocols to prepare for any crisis, health crisis or otherwise so as to secure the world travel and tourism council stamps.

Secondly, under prices preparedness. We need to adopt safe traveling steps so as to ensure the health and safety of all the tourists coming into Nigeria including reversed tourism by Nigerians. The second key priority is that, we need to guarantee sustainable growth of the sectors in order to recover from Covid impact and then driving that sustainable growth, there are four sub areas; 1: to promote climate action and greener environment so that the sector develops in a harmonious way. Secondly, it is critical that all activities in the tourism and hospitality and travel value trade should be designed as such a way that it should be inclusive to support youth and women particularly women so that it is also equitable and recognizes the role of women in particular the caring of women In the sector and the difficulty constitute about 50% of all the jobs In the travel and tourism sector. Nigeria needs to work hard with stake holders to eradicate illegal wildlife trade, particularly endangered species, and I believe that should be under the Scientist convention and shortly under sustainable growth we need to have a collaborative discussion by all stakeholders in order to drive sustainable decisions that will create maximal social impacts. The third priority is security and facilitation; so security worldwide is a major problem in Nigeria it is also special, from terrorism to insurgency and even the type of security challenge mentioned by those in the food sector where you have people coming into the restaurants, hotels and attack guests and of cause facilitation, government agencies and institutions should facilitate whatever steps are required by private sector projects to build their industry. Now we move on from there to some of the steps that we need to take as mandated by the permanent secretary Information and culture that the Nigerian Economic Summit Group has to work out with other stakeholders to resuscitate the Presidential Council and tourism, to provide the political will and collaboration platform, again to establish the terrorism development fund as fully recommended in the tourism development master plan. We view all the available law since we agreed that there should be holistic coverage of all the laws. The tourism convention should be established to draw in more conferences and of cause collaborate with state government. Again, we should be looking towards getting the full cooperation of the Federal Ministry of Information and Culture to grow the entire industry at large in line with whatever we have tried to get today. Now again as part of the next steps, Nigeria but public and private sector should take the offer by the Chinese government, this is coming from the permanent secretary, the offer of the Chinese government to cooperate with the Nigerian tourism culture, sports hospitality and similar sectors, and they're prepared to fund student overseas to China which they learnt from works from China which is a positive experience, so that's something for all sector operators to note.

State government is to do more to hold events in their respective domains to promote the tourism potentials in their respective states and to promote domestic tourism within the country in their respective states as well. A lot of things taken up by Kaduna state should be taken by other states such as having CCTV cameras distributed across state for security which is critical for tourism, and again for state government to collaborate more with stakeholders and associations at the state level and at the subnational levels. Again state government are to collapse all the taxes in their states and then we have the templates so that all taxpayers understand this streamlined one stop shot for taxation still like in Kaduna state. State government should launch a of tourism sites in their states and to take another step compile the tourism investment opportunities which would be made available to investors would state in the evidence base of such investment to thrive whether direct or portfolio investment and like states like Imo state should take the next step with tourism and hospitality operators in their state, put it up in their state website so that tourist could access them from outside the country before they come into the country. Again, the cooperation between the Federal ministry of information and culture and the national association of deals and banks as well as in the national parts is to be strengthened to ensure the protection of endangered species in that area and observes the beaches and forests preventing felling of trees and actually to promote the replanting of trees so that we have beach line tourisms being promoted and as the general for Immigration said, one of the key next steps is that in as much as the online visa project has been optimized, optimization would be a continuous process so that the visa is improved. On the part of tourists, all tourists are encouraged to make online payments for the visa before they depart from wherever they are so that they do not have challenges regarding visa issue in Nigeria when they land. Again, with religion tourists on the rise, government should have a strategy to promote religious tourism which is going to earn a lot of foreign exchange. Government should also and this is important for the natural national committee and the federal ministry of internal affairs to work hard and deliberately promote the African passport project so that Nigerians have it and other Africans have it to promote visa free problems within the continent and to promote tourism as well. Again so in terms of incentives, the bouquet of incentives that are available both under NNPC and as unfolded by the federal revenue service most of which sector players are unaware, all these incentives should be put together Unless incentive should be put together and there should be a deliberate communication strategy to make sector players aware of them , and for them to benefit from that because it was quiet new to everybody in here today, so that is a major output and it's been also proposed as a major next step more incentives specialized for the tourism and hospitality sector should be crafted particularly in response to the Covid 19 situation.

In view of the fact that the palliatives financial and nonfinancial palliatives given to the tourism and hospitality sector of the Nigerian government was not as appreciable as the sector players expected, the federal government should lay emphasis on crafting new set of palliatives both financial and physical in order to support the resuscitation of the sector because the sector was one of the hardest links across the whole economy in the world. Again, because Nigeria is not quiet competitive as a tourist destination, not just because of insurgency at the moment and some of these factors we mentioned but also because the experience aspects both from the airports to the hotels, is affected by the attitude of hotel staffs. There has to be deliberate policy so as a next step, business organizations and labor unions have to work together with the NESG and the government to create attitudinal change as well so that we have better attitude from their staff of public sector operators and hospitality as well.

The labor market information system which has been set up has to be strengthened to create a database of all projects value chain in the sector. This is critical as sector operators are legally not mandated to train their staff so these associations need to work hard to set standards so that it becomes mandatory for their operators to train your staff. Key next step and has already asked that the NESG should work with them on several platforms post this summit. Again in terms of the regulation parliament, there should be policy and regulatory reform so that the sector will grow across every aspect of the value chain. There should be sanctity of contract in the tourism and hospitality industry, we are learning now from experience. Again, the legislative reform that has asked that should take place should include a major stakeholder engagement before the national assembly works to pass both the NCDC bill and any constitutional amendment about the role of the federal and the state government. There has to be major stakeholder engagement to look at the bills very critically. Marketing of Nigerian investment potentials both digital marketing and under the Nigerian brand can both be promoted and a lot of collaborations will continue at all levels of the ministry and this collaboration will have a major component with the Nigerian media to ensure that Nigeria is reported positively because there are many reasons for which we should be reported positively.

This is a critical next step, there should be a specific desk for the tourism and hospitality industry sector, and the government should work with stakeholders to find out what the desk wants. The baroque for public sector have been committed to partnering and collaborating on the road map and several commissioners have also agreed to collaborate on the road map for the sector as outlined by NESG so that's a major output from this event and we will work with the ministry to see how that goes forward.

The government should make sure that they promote to host communities the importance of valuing tourists attractions within their domain so that they protect them and make them their own asset and create a friendly environment. Again it is very important for the promotion of the national archives to be protected via technology and perhaps legislation should be brought into place to make sure that this works this is a major output from the Nigerian bar association.

Now again, the issue of food security for the hospitality industry, the in particular and of cos the hotels with the price of rice and the exchange rate issue, the CBN should look into this and the Presidential committee security should take part in sorting this out so that there is stability and food security in the sector, all the cost elements that affect the sustainability of the sector should be basically looked into at subsequent events by the central bank perhaps at retreats so that they would have a holistic solution to this.

Selling of food in the streets, this is very important that there should be visits to tourism and hospitality industries operators to make sure that regulation is done and that may include things like sanitary inspectors and NAFDAC to look at the food environment and quality. This should also apply to street food trading because the health of the tourist is very important so as it applies to street food so it also applies to restaurants as well so that's a key takeaway from here.

They have to work with the industries operators to reduce the high rate of staff in the sector because that affects the quality of service and employment opportunity for youth should be created across board so that it reduces the crime level in the country which affects Nigeria as a tourist environment. Then the curriculum of universities and tertiary institution should be reviewed and ensure that the content promotes the tourism and hospitality development put in best practice.

Now on a final note, the private sector have to work with the government to proportionately reduce charges where necessary particularly in off season area so that Nigeria remains very competitive in

all that she does. So I want to end by saying that the federal ministry of information and culture has committed as a major next step to work collaboratively with the NESG through the tourism and hospitality thematic group to action the road map and other inputs. This coupled with all the commitments mentioned here today has given us a major compendium implementation. I thank you all. God bless you.

VIII. COMMUNIQUE

ISSUED AT THE END OF THE FOCUS GROUP FORUM ON THE TOURISM AND HOSPITALITY SECTORS IN NIGERIA ORGANIZED BY THE NESG'S TOURISM, HOSPITALITY, ENTERTAINMENT, CREATIVE & SPORTS INDUSTRIES (THECS) POLICY COMMISSION, 19 AUGUST 2021.

The Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission, along with other key stakeholders in the industry from both the Public and Private sector, deliberated on key issues with the aim of repositioning Nigeria's Tourism and Hospitality Sectors for sustainable growth and profitability.

1. Webinar Introductions by Dr. Ikenna Nwosu, Facilitator of the Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission of the NESG

Dr. Ikenna Nwosu, Facilitator of the Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission of the NESG welcomed everyone to the forum and noted that the event is focused on establishing stakeholders' consensus on the need to reposition Nigeria's Tourism and Hospitality Sectors for Sustainable Growth and Profitability. He therefore enjoined maximum contribution from all stakeholders represented at the event

2. Welcome Address by Mr. Udeme Ufot, Director, Nigerian Economic Summit Group/Private Sector Co-Chair, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission

Mr. Udeme Ufot, Director, Nigerian Economic Summit Group/Private Sector Co-Chair, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission noted that as Nigeria's leading economic sector policy advocacy Think Tank, the Nigerian Economic Summit Group, NESG, is witness to the exponential growth of the tourism and hospitality sectors in Nigeria, particularly over the last decade, following NESG's ground-breaking joint initiative in 2008 with the then Federal Ministry of Tourism, Culture and National Orientation to organize a series of events that resulted in the positive and accelerated transformation of the sectors.

The Private Sector Co-Chair emphasized the urgent imperative for the holistic repositioning of the Tourism and Hospitality sectors in Nigeria as an expected outcome from the forum, especially in the light of the humongous global financial/operational challenges faced by the sector operators in the wake of the lockdowns and consequential economic impact, occasioned by the onset of the rampaging covid-19 pandemic.

Mr Udeme indicated that the forum sought to provide the **neutral** and **sustained** platform for the continuous engagement of ALL stakeholders, including Governments at national and sub-national levels, private and social enterprise sectors, and development partners to foster a **Framework of Action** for the sustainable and holistic repositioning of the sectoral ecosystem.

3. Presentation by Dr. Ifeoma A. Anyanwutaku (Mrs.) M.B., B.S., M,P,H, Permanent Secretary, Information and Culture (FMIC)

Dr. Ifeoma A. Anyanwutaku (Mrs.) M.B., B.S., M,P,H, Permanent Secretary, Information and Culture (FMIC) gave a detailed presentation on the challenges confronting the tourism sector in Nigeria and proffered recommendations to ameliorate the problems in the tourism and hospitality industries. Dr Anganwutaku concluded by imploring the support of the NESG to: Resuscitate the Presidential Council on Tourism (PCT), establish the Tourism Development Fund as recommended by the National Tourism Development Master Plan as tourism development is capital intensive, Harp on the review of the governing laws affecting the sector, establish a Tourism Convention Bureau which would be bringing in international conferences to Nigeria, and establish a tourist guide company for the country.

4. Presentation of the Proposed Roadmap for Optimized Tourism and Hospitality Sectors in Nigeria” by Mrs. Ngozi Ngoka, Thematic Lead Tourism & Hospitality Industries Thematic Group (THITG), Nigerian Economic Summit Group (NESG).

Mrs. Ngozi Ngoka, Thematic Lead Tourism & Hospitality Industries Thematic Group (THITG), Nigerian Economic Summit Group (NESG) presented a proposed Roadmap for Optimized Tourism and Hospitality Sectors in Nigeria.

The Thematic Lead gave a broad overview of the Tourism & Hospitality Industries in Nigeria. She noted that as a result of the global economic impact of the COVID-19 pandemic on the tourism and hospitality sectors, 62 million jobs were lost in 2020, representing a drop of 18.5%, from the figure in 2019. She also highlighted how key countries sustained and revived both sectors.

Mrs. Ngoka took a dip dive into the objectives and outcomes of the forum as a precursor to the reform strategy proposed by the Thematic Group. The 7 steps reform strategy highlighted includes the following: Collaborative Stakeholder Engagements, Policy Review/Formulation, Legislative Reforms, Institution Reforms, Human Capacity Development, Implementation, Monitoring and Evaluation.

5. Session Closing Remarks by Engineer Nebolisa Anako, Permanent Secretary Federal Ministry of Youth and Sports Development / Public Sector Co-Chair, Tourism, Hospitality, Entertainment, Creative and Sports Industries (THECS) Policy Commission, NESG.

The Perm Sec noted that the Tourism, Hospitality, Entertainment, Creative and Sports Policy Commission Sector is the veritable tool to re-start national economies and interaction amongst people in this Covid-19 era and associated lockdowns and global economic downturn.

The Public Sector co-chair expressed his optimism that the outcomes of this conference would reposition the tourism and hospitality sectors in Nigeria to actualize its full potentials, open up employment opportunities for our growing youth population and contribute to National development.

6. Goodwill Message by Mr. Andrew Brown Regional Director World Travel & Tourism Council

Mr. Brown highlighted two priorities for Nigeria's tourism and hospitality industries. The first is crisis preparedness. He noted that the World Travel & Tourism Council had developed health and hygiene protocols for private sector operators which had been adopted by over 300 destinations across the world. He encouraged the Nigerian travel stakeholders to implement these protocols. The second priority he noted is that of sustainable growth which does not only refer to climate and environmental actions but also takes into consideration the way the sector can grow to benefit all.

7. Design Session 1: Cross-Cutting Industry Governance Issues

The panelist in this session shared strategic insights on cross-cutting industry governance issues in the Tourism and Hospitality Industries. Mr. Adeshina Emmanuel who represented the Ms. Yewande Sadiku, Executive Secretary/CEO Nigeria Investment Promotion Commission (NIPC) shared his insights on incentives to investors in the Tourism and Hospitality Sector. An example is the pioneer status incentive by the NIPC which provides a minimum tax holiday of 3 years and which can be extended to 5 years.

Mr. Mohammed Babandede, Comptroller-General, Nigeria Immigration Services (NIS) spoke extensively on initiatives by the Immigration Services aimed at simplifying the visa processing procedure for tourist. He particular highlighted the various initiatives for Nigerians ion the diaspora.

Ms. Osavize Winful, Director Servicom, FIRS, who represented Mr. Muhammad Nami, Chairman, Federal Inland Revenue Service (FIRS) noted that the issue of multiplicity of taxes which is widespread in states is being tackled by the National Tax Board. She however also noted the need to educate tax payers on the different type of taxes and incentives available to them.

Mrs. Patricia Narai, Director, Domestic & Eco-Tourism Promotion & Control Department, Federal Ministry of Information & Culture (FMIC) spoke on the different measures by the Ministry of Information and Culture to encourage domestic tourism in the country which involves the promotion of local sites of attraction in states.

Mr. Alhaji Aminu Agoha, Chairman, Tourism Consultants Forum highlighted the challenges confronting players in the tourism and hospitalities sectors industries. Airlines for instance have declared bankruptcy and have had to extend the validity of tickets purchased during the pandemic to 18 to 24 months. He therefore stressed the need for government's intervention in the sector in the form of increased palliatives, tax holidays, eradication of multiple tax at the federal, state and local level.

Finally, Dr. Taiwo Oluwatoyin Emmanuel, Commissioner for Tourism and Culture, Ogun State, highlighted the various tourism attraction in Ogun State and touched on the need for taxes to be harmonized to drive productivity in the sector.

8. Design Session 2: Deep Dive Industry Operations Issues

In this session, panelists deliberated on operational issues and solutions in the Tourism and hospitality sectors in Nigeria.

Some of the challenges highlighted by the panelists include:

- The Lack of sustainability and continuity of government policies and initiatives as the change in government results in projects being abandoned.
- Poor security is another issue. As noted by Mr. Paul Onwuanibe “Foreigners invest in places they can go for vacation.” Panelist noted that highlighted that the security challenges in the country serves as a discouragement to tourists.
- Multiple Tax Regime: The problem of multiple taxation in the industry serves as a disincentive for the growth and sustainability of the sector.

Panelist in the session also recommended that government should incentivize the sector to encourage investment into the sector. Financial institutions should be encouraged to give long term loans at favourable interest rate. Also, government should increase the allocation in budgetary terms to the sector. In addition, a single tax regime should be adopted and duplicity of functions should be discouraged: There should be a central body regulating the whole taxation process.

9. Design Session 3: Special Comment Segment

In this session, government officials, public & private sector practitioners shared their insights on the financing, legislating and practice-related issues in the tourism and hospitality sectors of Nigeria's economy.

Issues highlighted during the discussions include:

- For the Cinema business, operational cost remained stagnant while revenues dwindled significantly due to COVID induced fall in patronage and the fall in foreign exchange.
- The absence of a unitary and coherent voice in the tourism sector facilitates the inaction of the government.
- Inadequate investment into the tourism and hospitality sector. This is facilitated by the absence of confidence in the tourism sector and the elitist framework of industry players which deters the confidence of financiers in the ability of the sector to sustain cash flow which typically should come from the masses.
- Insecurity across the country threatens the sustainability and financial viability of the tourism industry.
- Lack of synergy and coordination in the development of aviation infrastructure.

Recommendations proffered by the panelists include the following:

- The need to foster partnerships between businesses and the government in the tourism and hospitality sector in the design of regulations. There are several policies and laws that have been put in place to address the issues in the tourism and hospitality sector, some of which are out of date. Hence, it is pertinent to review them to ensure their alignment to current global standards and its relevance to current issues. The Tourism Masterplan must be effectively implemented and the Associations' code of ethics must be effectively implemented to enhance regulation and the performance of the sector.
- The need to consolidate the Tourism Industry Players: Federation of Tourism Associations (FTAN) must facilitate the rallying of other associations and players in the industry under its umbrella to enable effective advocacy to the government.
- Strong legal backing through the NBA's secondment of legal advisers to the associations must be executed to enhance adherence of industry players to regulations.
- Tourism should be moved to the concurrent list to enable all tiers of government to effectively benefits from the sector.

10. Design Session 4/Closing Session: Collaborative Implementation Framework

The aim of the 4th session was for a collaborative implementation framework by all stakeholders. All stakeholders involved in the session offered their statements of commitment to the proposed Roadmap to Optimized Tourism and Hospitality Sectors in Nigeria

Mrs Josephine Ogbolu representing Mr Lawrence Ejiofor, Commissioner for Culture and Tourism, Delta State, noted that Delta state is fully committed to the road map.

Chief Tomi Akingbogon, representing FTAN made a commitment that FTAN will work with the NESG; and noted that the road map is fully approved.

Mr. Idris Iyan, Commissioner for Business, Innovation and Technology mentioned that Kaduna state is commitment to the road map and requested for a copy to get approval from his state's executive council.

Mrs. Olufunke Soley representing Mr. Folorunsho Coker, DG., Nigerian Tourism Development Cooperation (NTDC) noted that NTDC is committed to the road map. She however stressed the need for implementation.

Ms. Enitan Rewane, who spoke on behalf of the President of the Nigerian Bar Association (NBA) gave the NBA's commitment to support the road map, especially regarding the legal aspect, and thanked the NESG for their efforts.

Mrs Kehinde Kamson, President, REFSPAN gave her commitment to the road map.

Dr. Dasuki Arabi, DG. Bureau of Public Service Reforms also gave his commitment to the road map. He noted that his agency's commitment is beyond this programme as the Bureau is concerned with reforming public institutions.

Mr Aderinola Adeola, representing the Commissioner of Tourism of Ondo State also gave his commitment to the roadmap.

Representative from the Secretariat of the National Action Committee on AFCTA also Committed to the roadmap.

IX. EVENT PROGRAMME

TIME	ACTIVITY	RESPONSIBILITY
9:00	Webinar Introductions (5m)	Dr. Ikenna Nwosu, Facilitator, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission, Nigerian Economic Summit Group (NESG)
9:05	Welcome Address (5m)	Mr. Udeme Ufot, Director, Nigerian Economic Summit Group/Chairman, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission
9:10	Presentation: (10m) “Tourism & Hospitality Sectors as Catalysts for Nigeria’s Economic Recovery” (15m)	Dr. Ifeoma A. Anyanwutaku (Mrs.) M.B., B.S., M,P,H, Permanent Secretary, Federal Ministry of Information and Culture (FMIC)
9:25	Keynote Address: “Role of State Governments in the Development of Tourism and Hospitality Sectors in Nigeria” (15m)	H.E. Dr. Kayode Fayemi, Nigerian Governors’ Forum
9:40	Presentation (40m) “Proposed Roadmap for Optimized Tourism and Hospitality Sectors in Nigeria” (40m)	Mrs. Ngozi Ngoka, Thematic Lead, Tourism & Hospitality Industries Thematic Group (THITG), Nigerian Economic Summit Group (NESG)
10:20	Goodwill Messages	Mr. Andrew Brown World Travel & Tourism Council
10:30	Session Closing Remarks (5m)	Engineer Nebolisa Anako, Public Sector Co-Chair

		Tourism, Hospitality, Entertainment, Creative and Sports Industries (THECS) Policy Commission
10:33	INTERLUDE (2m)	

Design Session 1:

Cross-Cutting Industry Governance Issues

Discussions on Rethinking the Governance Framework for Tourism and Hospitality Sectors: Cross-Cutting Industry Governance Issues

Time	Activity	Responsibility
10:37 – 10:42	Introductions (5m)	Moderator: Mrs. Ngozi Ngoka, Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)
10:42 – 11:42	Discussions (60m)	<u>Discussants</u> <ul style="list-style-type: none"> • Ms. Yewande Sadiku, Executive Secretary/CEO Nigeria Investment Promotion Commission (NIPC) • Dr Yemi Kale, Director-General, National Bureau of Statistics • Mr. Mohammed Babandede, Comptroller-General, Nigeria Immigration Services (NIS) • Mr. Muhammad Nami, Chairman, Federal Inland Revenue Service (FIRS) • Mrs. Patricia Narai, Director, Domestic & Eco-Tourism Promotion & Control Department, Federal Ministry of Information & Culture (FMIC) • Alhaji Aminu Agoha, Chairman, Tourism Consultants Forum • Olumide Akpata, President, Nigerian Bar Association • Dr. Taiwo Oluwatoyin Emmanuel, Commissioner for Tourism and Culture, Ogun State.
11:42 – 11:57	Interactive Q & A /Consensus building (15m)	Moderator
11:57 – 12:02	Session Wrap-up (5m)	Moderator
12:02 – 12:05	BREAK (5m)	

Design Session 2:

Deep Dive Industry Operations Issues

Discussions about operational issues & solutions in the Tourism and hospitality sectors.

Time	Activity	Responsibility
12:05 - 12:10	Introductions (5m)	Moderator: Mrs. Ngozi Ngoka, Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)
12:10 – 1:10	Discussions (60m)	<u>Discussants</u> <ul style="list-style-type: none">• Alhaji Nura Kangiwa, Director-General, National Institute for Hospitality and Tourism (NIHOTOUR)• Chief Tomi Akingbogun, Proprietor, Rosebud Hotels, Abuja• Mrs. Abosede Ayeni, CEO, Tantalizers PLC• Mr. Trevor Ward, Managing Director, W Hospitality Group• Mr. Paul Onwuanibe, CEO, Landmark Africa• Mr. Folorunsho Coker, Director-General, Nigerian Tourism Development Corporation (NTDC)• Mr. Michael Williams, Former Managing Director, Cross River State Tourism Bureau• Idris Iyam, Kaduna State Commissioner for Business and Innovation and Technology.
1:10 – 1:25	Interactive Q & A /Consensus building (15m)	Moderator
1:25 – 1:30	Session Wrap-up (5m)	Moderator
1:30 -1:32	BREAK (2m)	

Design Session 3:

Special Comment Segment

Government, public & private sector practitioners will share information & knowledge about financing, legislating and practicing in the tourism and hospitality sectors of Nigeria's economy.

Time	Activity	Responsibility
1:32 – 1:35	Introductions (5m)	Moderator: Mrs. Ngozi Ngoka, Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)

1:35 – 2:25	Discussions (60m)	<p>Discussants</p> <ul style="list-style-type: none"> • Mr. Francis Anatogu, Senior. Special Assistant to the President on Public Sector Matters/Secretary, National Action Committee on Africa Continental Free Trade Area (AfCFTA) • Mr. Ted Iseghoi- Edward, Director-General, Association of Local Governments of Nigeria (ALGON) Secretariat • Mr. Hassan Abdullahi Zakari, Association of Tourism Practitioners of Nigeria • Mr. Guy Murray Bruce, CEO, Silverbird Organization • Mr. Samson Fatokun, Head of Account Management, West & Central Africa, International Air Transport Organization (IATA) • Ms. Lola Akinmade Akerstorm, Founder, Geotraveler Media • Mazi Uche Ohia, Imo State Commissioner for Tourism
2:35 – 2:50	Interactive Q & A /Consensus building (15m)	Moderator
2:50 – 2:55	Session Wrap-up (5m)	
2:55 – 3:00	Break (5M)	

Design Session 4/Closing Session:

Collaborative Implementation Framework

The underlisted critical stakeholders will offer their statements of commitment to the proposed *Roadmap to Optimized Tourism and Hospitality Sectors in Nigeria*.

Time	Activity	Responsibility
3:00 – 3:05	Introductions (5m)	<p>Moderator: Mrs. Ngozi Ngoka,</p> <p>Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)</p>

3:05 – 3:20	Panel Discussions (15m)	<u>Discussants:</u> <ul style="list-style-type: none"> • Senator Rochas Anayo Okorochoa Chairman, Senate Committee on Tourism. • Honourable Omoregie Ogbeide -Ihama, Chairman, House of Representatives Committee on Culture and Tourism • Mrs. Kehinde Kamson, President, Restaurants and Food Services Proprietors Association of Nigeria (REFSPAN) • Mr. Folorunsho Coker, Director-General, Nigerian Tourism Development Corporation (NTDC) • Mr Lawrence Ejiofor, Delta State Commissioner for Culture and Tourism • Lawrence Ogieva, Edo State Commissioner for Arts, Culture, Tourism and Diaspora Affairs • Rifkatu G. Bara, Gombe State Commissioner, Ministry of Trade, Industry and Tourism • Mazi Uche Ohia, Ph. D, Imo State Commissioner, Ministry of Tourism. • Dr. Taiwo Oluwatoyin Emmanuel, Ogun State Commissioner for Tourism and Culture • Deji Falae, Ondo State Commissioner for Tourism • Idris Iyam, Kaduna State Commissioner for Business and Innovation and Technology
3:20 – 3:25	Resolution remarks (5m)	Moderator
3:25 – 3:30	Session wrap-up (5)	Moderator
3:30 – 3:35	Forum Wrap up/Next Steps (10m)	Dr. Ikenna Nwosu , Facilitator, Tourism, Hospitality, Entertainment, Creative & Sports Industries (THECS) Policy Commission, Nigerian Economic Summit Group (NESG)
3:35 – 3:45	Communiqué	Mrs. Ngozi Ngoka , Thematic Lead, Tourism and Hospitality Industries Thematic Group (THITG) of the Nigerian Economic Summit Group (NESG)
3:45 – 3:50	Closing Remarks/ Vote of Thanks	Mr 'Laoye Jaiyeola Chief Executive Officer Nigerian Economic Summit Group NESG

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