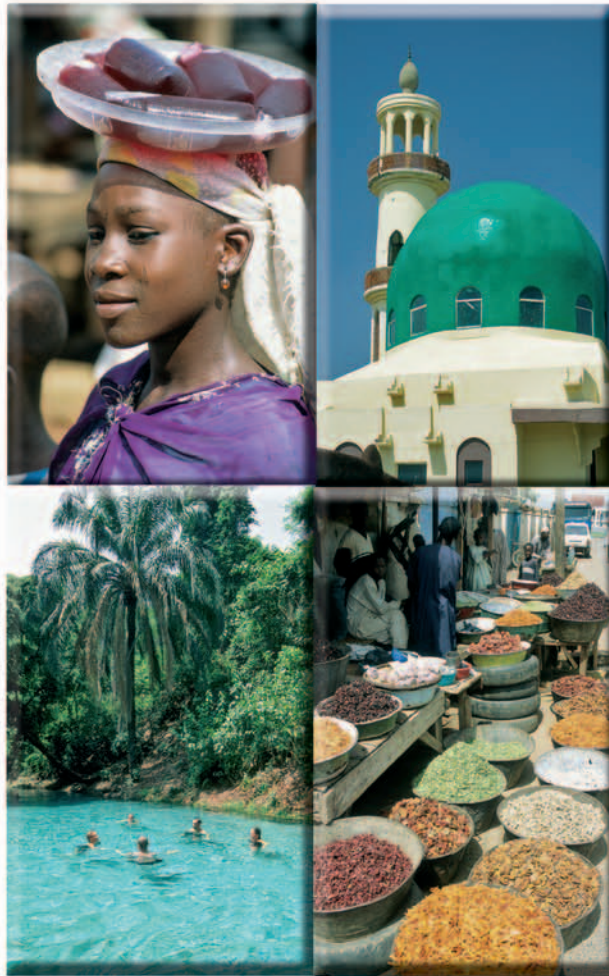




Nigeria Tourism Development Master Plan

Institutional Capacity Strengthening to the Tourism Sector in Nigeria



NIR/03/002

Final Report Executive Summary

Government of the Federal Republic of Nigeria

United Nations World Tourism Organisation

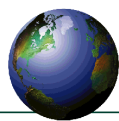
United Nations Development Programme

Tourism Development International

January 2006

NIGERIA TOURISM MASTER PLAN

Executive Summary



Tourism Development
International



MESSAGE BY THE SECRETARY-GENERAL OF THE WORLD TOURISM ORGANIZATION

The rapid growth of the modern tourism industry which, in 2005 registered approximately 800 million international tourist arrivals worldwide, has made the tourism industry one of the most important industries of the world, particularly in economic terms. One of the most valuable characteristics of the tourism industry is that while it has grown in numbers, it has also grown in variety of destinations as there has been a continued geographical spread of tourism to all parts of the world which has made it possible for many countries, especially developing countries, to develop tourism as a viable engine for socio-economic development.

Essentially, tourism can have a profound impact on the society, economy and environment of nations. Socially, one of the most immediate benefits of the tourism industry is its ability to create employment and, in the case of tourism, an added benefit is that it caters for both skilled and unskilled employment. As a labour-intensive industry, tourism has the potential to create more jobs per unit of investment than any other industry and tourism can be a useful source of employment for women and ethnic minority groups. Environmentally, tourism, when properly developed and managed, can serve as a mechanism for protecting natural environments; preserving historical, archaeological and religious monuments; and, stimulating the practice of local cultures, folklore, traditions, arts and crafts, and cuisine. And, economically, tourism brings many benefits to the Central Government, local authorities as well as the private sector through the generation of foreign revenue, financial returns on investment, taxation on tourists and tourist products, and, linkages to other local industries such as agriculture and fisheries.

One of the most important challenges facing the modern world is the fight against poverty and this is a battle that governments, agencies and institutions have been fighting over decades. We in UNWTO are convinced that with its enormous economic power and high potential for employment creation, its capacity to spread its socio-economic benefits to all levels of society and to all parts (including remote areas) of developing and least developed countries, and, its sustained resiliency in times of crisis, tourism can be a leading sector in the fight against poverty and, it is no surprise that many governments have placed tourism on the top of their development agendas.

Nigeria is one of the leading countries in Africa in the fight against poverty and plays an active role in UNWTO's ST-EP programme (Sustainable Tourism – Eliminating Poverty) – a programme which was launched in 2002 and focuses on longstanding work to encourage sustainable tourism - social, economic and ecological - which specifically alleviates poverty, bringing development and jobs to people living on less than a dollar a day. Nigeria has chaired the Working Group of the UNWTO Executive Council (the highest policy-making organ of the Organization) which supervised the preparation of the ST-EP initiative. Furthermore, Nigeria was recently elected as the Chairman of the UNWTO Commission for Africa.

UNWTO applauds the initiative of the Government of Nigeria to actively develop tourism as a means for improving the socio-economic conditions of the Nigerian people and diversifying its economic base. However, the success of Nigeria's tourism industry depends on its sustainability.

That is why, UNWTO, at the request of the Government of Nigeria, and through the support of the United Nations Development Programme (UNDP), executed this project for the formulation of a National Tourism Master Plan for Nigeria which focuses on Institutional and Capacity Strengthening Support to the Tourism Sector. The objective of this project is to promote the sustainable development of the tourism industry through capacity building of the Government (at the Federal level) in the areas of human resource development, research development, improved sectoral planning and governance. The project also provides capacity building at the local/State level in promoting tourism development at the community level by encouraging local community participation, ownership and management of the tourism sector.

The Master Plan has addressed a number of vital issues and provides strategic recommendations in the areas of tourism policy, governance, development of tourism products, marketing approach, international and domestic transportation, hospitality education and training, tourism organization and legislation, tourism management information systems, amongst other issues.

Through the implementation of this Master Plan's recommendations, it is expected that the Government of Nigeria, through its Ministry of Culture and Tourism, would be better equipped to develop and manage the tourism industry so as to enhance the economic benefits of tourism through sustainable, people-oriented development policies which would spread the benefits of tourism to all parts of the country and all layers of society, thereby greatly contributing to the eradication of poverty and the upliftment of Nigeria and its people.



Francesco Frangialli

NIGERIA TOURISM DEVELOPMENT MASTER PLAN

EXECUTIVE SUMMARY

CONTENTS

| | <u>Page</u> |
|---|--------------------|
| Message from Secretary General of the World Tourism Organization | |
| 1. Introduction | 1 |
| 2. Master Plan Report Structure | 2 |
| 3. Overview | 2 |
| 4. Key Findings | 4 |
| 5. Strategic Recommendations | 10 |
| 6. Action & Implementation Programme | 16 |



NIGERIA TOURISM MASTER PLAN

EXECUTIVE SUMMARY

1. INTRODUCTION

The Tourism Sector in the Federal Republic of Nigeria has been identified by the President of the Federal Republic, Chief Olusegun Obasanjo GCFR, as one of the six priority areas for development. A Tourism Master Plan is required to develop the sector. Poverty alleviation and generation of employment, physical environmental enhancement and cultural and social issues, including HIV /Aids are central issues in the plan.

The President initiated a Presidential Committee for the Nigeria Tourism Development Master Plan. Subsequently, at the request of the Federal Government, the United Nations World Tourism Organisation (UNWTO) and the United Nations Development Programme (UNDP) took responsibility to part fund and implement the production of the Master Plan.

Tourism Development International Ltd was contracted by UNWTO as the consultants to produce the plan. The project commenced in Abuja on 7th February 2005. An inception report was delivered in March 2005, a Mid Term Report on 7th August 2005 and a Draft Master Plan Report on December 12th 2005

A number of consultative seminars on the findings, key conclusions and initial recommendations were held with the stakeholders during October and November, after which the Draft and Final Reports including the Master Plan were produced.

The Project team wish to acknowledge the evident interest of His Excellency the President of the Federal Republic in the project, the support of the Honourable Minister for Culture and Tourism, Ambassador Frank Nchita Ogbuewu, the Project Co-ordinator, Dr. Franklin Adejuwon and the officials in the Federal Ministry of Culture and Tourism, the Nigerian Tourism Development Corporation and other Federal and State Ministries as well as many government agencies. The Project team thank the UNDP Resident Representative and other officers in Abuja and the UNWTO Head of the Technical Co-operation Service and officers in Madrid for the continuing support and encouragement. The support and understanding of the private sector is very much appreciated in their willingness to share information and their knowledge with the team.

Finally, the many State Governors who so warmly received and assisted the team on their field visits are offered a special acknowledgement and thanks.

2. MASTER PLAN REPORT STRUCTURE

The Tourism Master Plan report is divided into three volumes:

- **Volume I – CURRENT SITUATION ANALYSIS** sets out the findings resulting from field visits, consultations, desk research and market research. The conclusions of the team on a range of areas, SWOT analysis and key issues for Nigeria are included.
- **Volume II – STRATEGIC RECOMMENDATIONS & IMPLEMENTATION** sets out the direction and the Master Plan together with the Action Programme.
- **Volume III – TECHNICAL REPORTS AND APPENDICIES** supporting and elaborating the findings and recommendations of the Tourism Master Plan.

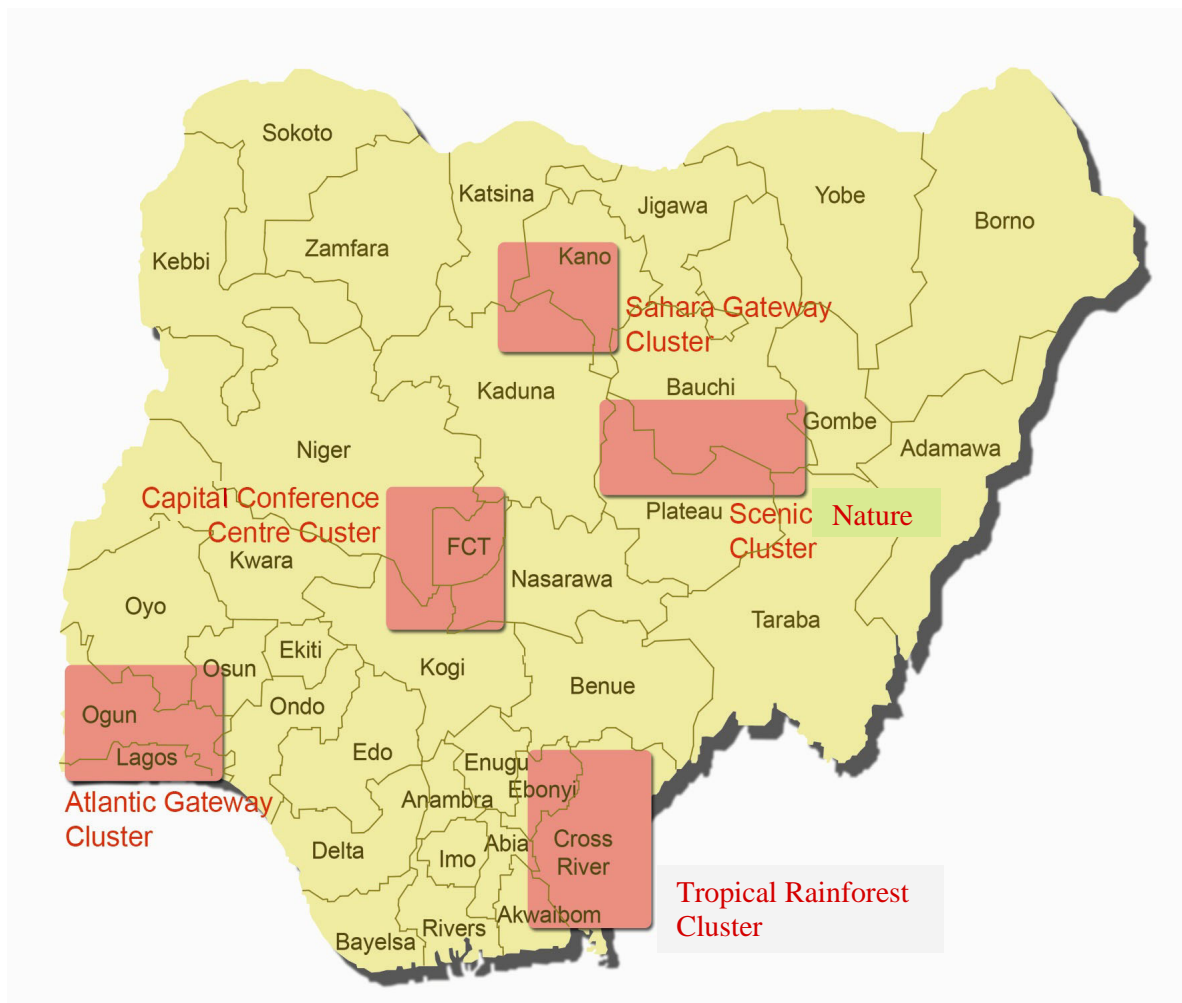
There is also a separately bound **EXECUTIVE SUMMARY (This Document)** which summarises the findings and recommendations and also includes the Action Plan.

3. OVERVIEW

The principal conclusions from the analysis of the economic impact of Tourism on the economy of Nigeria conducted by the project are:

- Spending by international tourists has a direct impact on the national economy estimated at US\$280m/N36b.
- Downstream economic impacts from the “export” revenues of international tourist spending are estimated to generate additional gross revenue of US\$224m/N29b.
- While the incidence of domestic leisure travel may be low, the sheer size of Nigeria’s population means that there is a significant contribution to the demand for tourism services from domestic travel activity. The revenue value of this impact is unknown.
- The revenue generated from travel within the country by employees and staff of Federal Government departments and agencies generates a demand for an estimated US\$68m/N8.8b of transport and hospitality sectors.
- State governments also make a considerable contribution to the transport and hospitality sector in the undertaking of official travel activities. The revenue value of this impact is unknown.

- The contribution to government revenue from VAT levies on the Hospitality sector, recorded at N1.149 million in 2004, is considered to grossly understate the actual level of revenue received.
- Company Income tax generated by the Hospitality sector was recorded at N313 million in the 2005 year, the first year such a breakdown was available.
- Implementation of the Tourism Development Master Plan in Tourism Cluster development will disperse the economic benefits from tourism activity. The economic benefits from tourism activity will be spread much wider and to a greater proportion of the population than is currently the case.
- Demand for labour will receive a very significant stimulus from implementation of the proposed Tourism Development Master Plan.



The future for tourism in Nigeria is dependent on the opportunities and challenges being exploited and addressed. The diversity of cultural attractions, the friendly disposition of the people, a revamped National Tourism Organisation, Human Resources Development and new Convention Bureau provide key opportunities.

Implementation of the Tourism Development Master Plan will be a major challenge for the government and industry, as will changing the international image of Nigeria. Improving the quality of the product and facilities and putting in place a comprehensive training programme will require a very strong partnership between the public and private sectors.

If the opportunities and potentials, which Nigeria has, are exploited and the challenges met, substantial investment in planned and strategic marketing of Nigeria as a desirable tourist destination will be required and will pay positive and substantial dividends.

4. KEY FINDINGS

The present National Tourism Development Corporation (NTDC) Act is pretty basic. Omitted from its text are various provisions which are salient to the development of a viable tourism industry and which ensure continuing sustenance of the present efforts. This is being addressed with the new Bill that has been drafted by the project team

The Presidential Council on Tourism which is chaired by His Excellency the President, Chief Olusegun Obasanjo, and the Tourism Steering Committee which is chaired by the Honourable Minister are very important in ensuring the implementation of the Master Plan and to the future of the industry in Nigeria.

The Federal Ministry for Culture and Tourism needs strengthening to fulfill its role in securing the necessary Federal investment, target setting and monitoring. There is need for economists, planners and personnel with statistics and industry experience

The Nigerian Tourism Development Corporation (NTDC) is overstaffed. The staff lack appropriate training and experience. The organisation is badly equipped, lacking computers, with very poor office accommodation. Together with an inadequate budget the overall result is an ineffective organisation.

The commercial sector lacks a much needed strong single voice to articulate its needs to government. The overall state of the commercial sector of the tourist industry and the lack of government support and the multi taxation of the industry underline the need for a strong single industry voice

Despite the existence of a number of funding schemes targeting SME enterprises and available to applicants in the tourism sector, the conditions are currently too restrictive to effectively foster investment in the sector.

The conditions and process to obtain Bank of Industry funding need to be made simpler and more accessible.

The collection and compilation of tourism statistics needs urgent improvement. The reliability of the current statistics is extremely low and no information was available on tourists spending and overall tourist revenue for the country. However, it would appear that **the number of international visitors to Nigeria has remained static over the last 15 years.**

The total number of international air visitors to Nigeria in 2004 (the benchmark year) is estimated at 190,000. The level of spending by international tourists in 2004 is estimated to be N 36 billion (US\$ 280million).



To be effective and efficient in stimulating investment in development of the tourism clusters, the current conditions of the funding schemes for SME companies will need to be amended as they are too complicated and difficult for SMEs.

At the time of this report, no hotel or hospitality project had been successful in securing incentives for a proposed investment. The same applies to the mandated fund available through the Bank of Industry for lending to SME enterprise. This is a result of complicated application processes and the inability of people in the sector to prepare adequate business plans

The current marketing approach is very weak. The marketing of Nigeria as a tourist destination is under funded and lacks a strategic marketing approach. The marketing collaterals are not up to international standards; while they are informative they are not customer friendly.

A survey of tour operators in the UK, Europe and the United States of America indicated a lack of information or knowledge about Nigeria as a tourist destination.

The adoption of a niche marketing approach will be critical to the success of any future marketing strategy and therefore the success (or otherwise) in developing tourism in the country.

The potential market segments for development are likely to be leisure (new experience seekers; Nigeria's Diaspora; special interest; expatriate community; family holidays), conference and meetings, visiting friends and relatives (VFR), religious sports and other events.

Air transport capacity (both external and internal) is satisfactory to meet the needs of tourism growth in the immediate future. The safety aspect of the internal air transport has recently become a matter of concern. The presidency has taken steps to address it.

The international airports terminal buildings are satisfactory, however the runways in Lagos need upgrading and repairs. The domestic terminals are poor and need modernisation.

The road network is generally adequate with some exceptions of the roads to tourist sites which are being addressed. City taxis need to be upgraded and fitted with meters. The rail network will not serve or have any impact on tourism in the near future.

The visa regime as it is currently operated is a very real barrier to tourism growth. It is punitive and does not serve the tourism interests of Nigeria. Applicants for visas must produce a letter of invitation from Nigeria and apply at the embassy or high commission in the country where they reside.

Many of Nigeria's competitors have much more friendly visa regimes with some requiring no visa for nationals of the tourism generating countries. This issue needs to be addressed as a matter of priority.

The Slave Routes are a strategic element in Nigeria's cultural tourism product offer and need development and packaging as they are not well presented at the present time. Many of Nigeria's historic sites are in a dilapidated state, have no interpretation or signposting. The current deplorable state of the Nigerian natural environment is a strategic competitive disadvantage.

The range and number of festivals and events can be a highly marketable product but they require some strategic improvement to make them more marketable. Event management needs to be professional, spectator facilities, safety, access and parking need improvement.

Internationally operated hotels are currently providing a high quality product to the business market. The spare capacity that currently exists at these properties should be offered to tour operators at favourable rates.

Private locally operated hotels are currently performing poorly but an opportunity exists for the development of more good quality professionally managed “boutique” hotels that are capable to develop niche markets.

Government bodies must remove themselves from operating hotels as they are not providing an acceptable quality and such hotels would be best managed by the private sector.

Accommodation and catering facilities need to be developed at the National Parks and the management of accommodation and catering at the National Parks should be privatized.

The conference facilities in Lagos and Abuja and in some other locations are good. There is a need to encourage private sector local conference management companies in Abuja to provide a professional conference service and organize social events for delegates and spouses. The public sector is not equipped to provide the professionalism required.

The human resources capabilities of the tourism and hospitality sectors are lagging far behind in terms of quality, standards and skills delivery. There is a lack of balance between management and supervisory training and craft skills training. The numbers receiving craft skills training need to be greatly increased

The National Institute for Hospitality and Tourism (NIHOTOUR) is grossly overstaffed and ineffective in its present role as a provider of educational services. The Institute has no credible on-site practice facilities nor has it any experience of delivering skilled personnel to the workforce.

The various education providers do not specify skills or programme outcomes. There is no way of ensuring consistent delivery of quality outcomes nor is there any way for auditing the quality of outcomes of the various training and education institutions. The conditions in the training institutes are very poor, dirty, ill equipped, badly maintained and are under-funded. The management and staff morale is poor and at a low level. A number of institutions train their course attendees in theoretical aspects but have no on-site practice training facilities.

There is a significant shortage of suitably qualified instructors, teachers and lecturers across the teaching faculty. They also lack industry experience and an international aspect. The consequence is that the teaching methods and course content are out of date.

The foregoing is an overview of the current situation in tourism and of the issues that currently exist and are discussed in full in the chapters of Volume I of the main report of the Tourism Master Plan. An overview of these key findings is as follows:

4.1 Tourism Policy, Governance & Organisation

- The existing legislation is weak. The proposed tourism bills and classification proposals should be put on hold until the master plan is in place.
- The presidential Council on Tourism and the Tourism Steering Committee on Tourism are unique and key to driving tourism growth.
- The Federal Ministry for Culture and Tourism needs strengthening and professional personnel.
- The NTDC is overstaffed, under resourced, lacks targets and action plans and consequently is in-effective.
- The commercial sector lacks a strong unified voice.
- The Public/Private relationships are non-existent.
- There is a lack of an enabling environment for the private sector involvement and investment in the tourism sector.
- The current marketing of Nigeria is inadequate.

4.2 The Value of Tourism to Nigeria

- The sector lacks reliable statistics and market information
- Essential databases to implement the Tourism Satellite Account (TSA) are not available
- The project identified 190,000 international air arrivals with visitor spending at US\$ 280 million for 2004.
- No information exists on land frontier arrivals
- The existing incentives and investment procedures are not attracting investment in the tourism sector

4.3 Current Marketing Approach

- Current marketing activities are under-funded, inadequate and ineffective

- The tourist products are not organized or packaged for the market place
- Nigeria's tourist attractions are unknown to the international travel trade
- The image of Nigeria abroad is very negative and is not being addressed

4.4 Access & Internal Transportation

- International air access is adequate for existing and short term needs
- Internal air transport needs safety improvements as a matter of urgency
- The road network is adequate and amongst the best in Africa. It needs to be properly maintained and signposted

4.5 Visa Regime

- The visa regime is a very real barrier to tourism growth



4.6 The Nigerian Tourism Product

- The slave route, culture and heritage are strategic elements in the Nigerian tourism product but require development and packaging
- Nigeria's historical and cultural sites are in decay and the physical environment is a strategic competitive disadvantage
- With improvements in presentation and packaging the many festivals and events can be highly marketable
- Levies and imposts by the federal, state and local governments make trading difficult and raise the operating costs for hotels by up to 30%.

- The poor standards in public sector enterprises underlines the need for privatization
- Private sector operator hotels are performing poorly with the exception of a limited number of “boutique” style hotels
- Nigeria is well endowed with conference facilities
- Destination Management Companies (DMCs) and conference organizers are weak or non-existent at present

4.7 Tourism Hospitality, Education & Training

- Human Resource Development is totally inadequate in training quality, skills range and numbers
- NIHOTOUR is grossly overstaffed and ineffective
- The training institutions are ill-equipped, badly maintained and lack on-site practical training facilities
- There is a significant shortage of suitably qualified teachers and instructors

5. STRATEGIC RECOMMENDATIONS

Volume II addresses the overall issues identified above and determines the direction, methodology and actions the government must take if tourism is to become a profitable and sustainable economic activity linked to the governments overall policy of development through institutional capacity building. The development of a vibrant tourism industry will rest with a range of actions and implementation processes. Volume II shows the way forward through a series of recommendations and action plans as well as the implementation processes necessary to make them work. The following is a summary of the key recommendations from which the Action and Implementation Programme evolves:

Key Recommendation I

Positioning Nigeria Tourism

That Nigeria adopt a clear identifiable positioning as a cultural and regional conference destination in the tourism marketplace

Key Recommendation II

Tourism Clusters

The development of tourism should be concentrated in five clusters.

The five clusters are

- Tropical Rainforest
- Conference Capital
- Atlantic Gateway
- Scenic Nature
- Sahara Gateway

Key Recommendation III

Product Development

Market led quality products should be developed for international, regional and domestic tourists

Key Recommendation IV

Flagship Tourism Projects

Within each tourism cluster, flagship projects should be developed to act as tourism icons and as a catalyst for all further development of tourism within the cluster. The Flagship Projects proposed are:

Tinapa Business, Leisure and Conference Resort (Tropical Rainforest)

Cross River Tropical Rainforest (Tropical Rainforest)

Development of Conference, Meetings and Event Management Capability (Conference Capital)

Farin Ruwa Eco Tourism Project (Conference Capital)

Olokola Cultural Resort (Atlantic Gateway)

Museum of Traditional Nigerian Architecture (Scenic Nature)

Ancient City of Kano (Sahara Gateway)

Key Recommendation V

Sites of Regional Significance

Investment resources should be allocated to a number of sites of regional significance which are unique to Nigeria and offer the country a competitive advantage

Key Recommendation VI

Accommodation

Encourage the development of international three star hotels. The management and operation of all accommodation units be privatized and that privately owned “Boutique” hotels be encouraged.

Implement hotel classification as a development as well as a marketing tool

Key Recommendation VII

The Environment

Each State Government should appoint a Waste Management Officer to establish and implement a waste management system involving the general public, Local Governments and private waste management enterprises.

The development of tourism products should be preceded by an environment impact study. Planning and the protection of cultural assets and heritage sites requires the co-ordination of the three tiers of government and particularly local governments.

Key Recommendation VIII

Safety and Security

Establish the Tourism Security Committee to coordinate the security aspects of tourism

Key Recommendation IX

HIV/AIDS

Advice notices for tourists on HIV / Aids be produced and distributed through hotels and other outlets

All promotional activities be aimed at attracting responsible tourists

Key Recommendation X

Arts and Crafts

Reconstitute the National Crafts Council

Establish design centres and mobile clinics introducing standards and quality control

Key Recommendation XI

Festivals and Events

Promote the initial Calendar of Festivals and agree annual dates

Improve spectator facilities and crowd control where needed

Develop a new national cultural show with the National Dance Troupe to be based in the new Culture & Tourism Centre

Key Recommendation XII National Parks

Strengthen the protection role of the National Parks Service. Implement the recommendations made for the individual parks within the clusters

Key Recommendations XIII Access and Internal Transport

Perimeter fencing should be erected at all airports

Safety requirements should be fully implemented for all domestic aircraft and air traffic

Key Recommendations XIV Marketing

A significant increase in marketing expenditure will be required to overcome the lack of awareness of Nigeria as a tourist destination and the very poor image of the country in the main international markets. A budget of US\$15million over five years (2006-2010) is the minimum recommended for marketing purposes.

Key Recommendation XV Target Markets

Marketing activities will be focused on the following target markets which are considered to offer the best prospects for Nigeria

International – United Kingdom, Western Europe, USA, South America, Caribbean

Regional - ECOWAS, South Africa

Domestic

Key Recommendations XVI Market Segments

Marketing activities will be focused on the following market segments which are considered to offer the best prospects for Nigeria

Leisure – New Experience Seekers, Diaspora, Expatriate Community, Family Holidays

Business – Conference/Meetings

Visiting Friends and Relatives (VFR)

Other – Religious Crusades, Sporting Events, Shopping

Key Recommendations XVII

Marketing Approach

The overall marketing approach for tourism in Nigeria will be to create a range of holiday packages and market these packages directly to international tour operators and regional travel agents for inclusion in their holiday programmes

A major promotional and public relations campaign will also be undertaken to counteract the country's negative image

Key Recommendations XVIII

Branding

A new brand for Nigeria Tourism will be put in place which will project a new vibrant image for Nigeria

Key Recommendation XIX

Partnership

All marketing activities will be part of an integrated marketing plan and implemented in partnership with the industry

Key Recommendation XX

National Institute for Culture and Tourism

Establish a National Institute for Culture and Tourism to research, plan and oversee education and training for the culture and tourism sector

Key Recommendation XXI

Abuja College of Culture and Tourism Studies

Establish Abuja College of Culture and Tourism Studies aimed at becoming the premier tourism and cultural college serving West Africa

Key Recommendation XXII

Legislation

New legislation be enacted identifying clear roles for the federal and state agencies in tourism

Key Recommendation XXIII

Nigeria Tourism Authority

In line with best practice establish Nigeria Tourism Authority to implement government tourism policy

Key Recommendation XXIV

Convention Bureau

For the promotion of Nigeria as a regional conference and meetings destination establish the Abuja Visitor and Convention Bureau within the structure of the Nigeria Tourism Authority

Key Recommendation XXV

Visa Regime

The requirement to obtain a single entry visitor visa for a stay of up to one month should be removed for nationals of tourist producing countries and potential tourist producing countries where it is deemed that migrant workers will not be seeking jobs in Nigeria

Key Recommendation XXVI

Tourism Satellite Account

To produce a Tourism Satellite Account for Nigeria in 2008 the following should be implemented, starting in 2006

- Introduce redesigned migration forms
- Implement twice-yearly airport exit surveys
- Include domestic travel in the household omnibus survey programme
- The NTA implement simplified surveys at major land borders
- The NTA implement surveys into niche markets within Nigeria
- The Central Bank and other agencies to be strongly involved.

Key Recommendation XXVII

Incentives and Investment Programme

The recommended incentives should be put in place and promulgated including

- Soft Loans
- Tax Incentives
- Grant Scheme
- Pioneer status
- Duty Free Import of equipment
- Land at concessionary rate
- Surety of foreign loans
- The existing disincentives should be removed or consolidated

Key Recommendation XXVIII

Tourism Management Information System

Implement an efficient TIS including information on visitor numbers, characteristics, behaviour and spending.

Collect employment statistics, accommodation occupancy rates

Analyse and promulgate findings



6. ACTION AND IMPLEMENTATION PROGRAMME

This chapter outlines the organizational structures and actions required to implement the Tourism Master Plan. Suggestions as to how the Tourism Master Plan can be funded are also outlined.

The table below sets out a listing of Priority actions for immediate implementation. It is recommended that these actions be implemented during 2006 with a view to building momentum and raising the profile of tourism in Nigeria amongst the general public, private sector tourism interests, Federal and State Government officials and potential investors.

The following Priority Actions are drawn from the Action Plans, as outlined in 6.2

| Action No. | Priority Actions (2006) | Lead | Support |
|-----------------|--|-------------------|---------|
| A.2. | Establishment of the Tourism Master Plan Implementation Organization (TMPIO) in presidency | FGN | TMPIO |
| G.9. | Establishment of the Tourism Development Fund Machinery | FGN | TMPIO |
| B.4. | Undertake feasibility study and architectural outlay for Atlantic Gateway cluster Project | PCT/MCT | TMPO |
| B.4. | Construction of the Coastal Road through Epa to Olokola 55 kilometres | State Governments | FGN |
| A. 6. | Establish Nigeria Tourism Authority and office | FGN | TMPIO |
| D.3. | Develop new brand for Nigeria tourism and undertake Tourism Awareness Programme | NTA | TMPIO |
| B.12. | Prepare Slave Route Feasibility Study and Convention: Develop a co-operative marketing approach with other Slave Route countries | PCT/ FGN | TMPIO |
| D.6. | Package and promote Abuja Carnival through selected tour operators and develop professional approach within Private sector | FGN | TMPO |
| B.21. | Agree design of facility mix for Cultural and Tourism Centre, Abuja | FGN | MCT |
| B.6. | Undertake restoration of part of Kano City as pilot project | Kano State | TMPIO |
| G.2. | Produce Tourism Investment prospectus and organize Investment conference in London | FGN | TMPIO |
| B.7. / B.13. | Prepare Feasibility Study and commence development of Farin Ruwa Eco Tourism Project | Nasarawa State | TMPIO |
| A.4. | Implement new visa regime | FGN | TMPIO |
| B.23. | Pedestrianize Onikan Area Lagos City as pilot project | Lagos State | TMPIO |
| D.34./ D.42. | Promote TMP to tourism Industry both within and outside Nigeria | TMPIO | MCT |

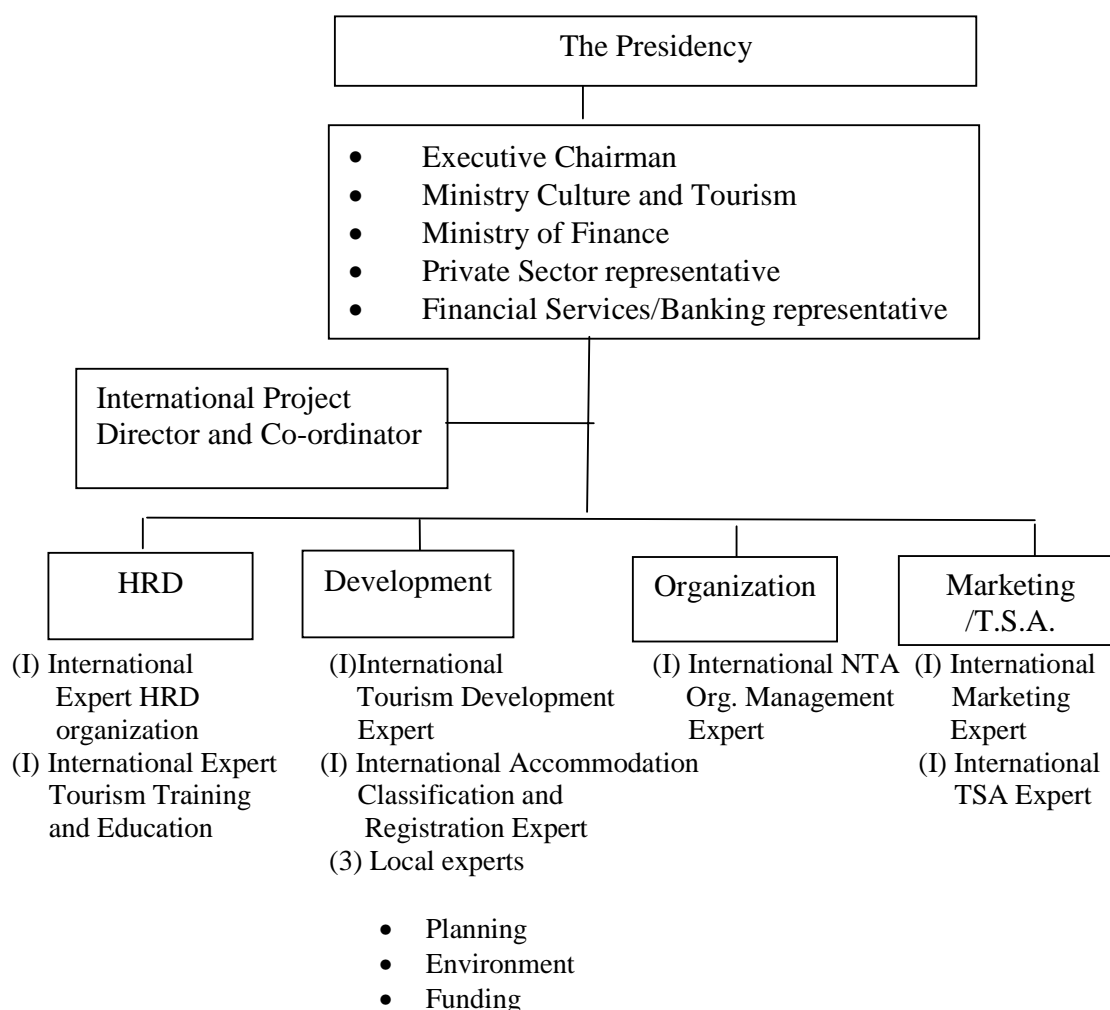
The Tourism Master Plan Implementation Organisation will have responsibility for overseeing the implementation of these Priority Actions.

6.1 Tourism Master Plan Implementation Organization

A Tourism Master Plan Implementation Organizational (TMPIO) is imperative as the take-off point of the implementation strategy and will be established in the **first quarter of 2006**. The TMPIO will be responsible to the Presidential Tourism Council and will operate under a controlled budget dispensation. Because of the envisaged involvement other international agencies and financiers in the tourism development process of Nigeria, we strongly recommend a formula of a dependable priority and acceptability outside barometer ministerial ambiance under the direct control of the President

The TMPIO will comprise of a Presidential nominated leadership capable of interpreting the issues of Tourism Master Plan and who must also have direct access to the President, P.C.T. Government machineries and international organizations. The TMPIO will also comprise of representation from the Ministry of Culture and Tourism, Ministry of Finance, private sector tourism, financial services/banking sector and a full time Executive Chairman. The TMPIO will retain the services of an International Project Director/Co-ordinator and will employ international and local executives on a consultancy basis.

TOURISM MASTER PLAN IMPLEMENTATION SECRETARIAT



It is envisaged that the Tourism Mater Plan Implementation Organization will remain in place for the first three years of the timeframe of the Tourism Master Plan (2006-2008). There will be a gradual transfer of responsibilities to the newly established N.T.A. and N.I.C.T. during 2007 and 2008. From 2009, the N.T.A. will have full responsibility for the development and marekting of tourism in Nigeria.

6.2 Action Plans

The action plan tables in the following are laid out as follows:

1. An identification number for each part of the action programme with a prefix letter designating the area to which the action refers:

A – Organization Action Plan
B – Development Action Plan
C – Access and Internal Transport Action Plan
D – Marketing Action Plan
E – HRD Action Plan
F – TSA Action Plan
G – Investment and Incentives Action Plan
H – Tourism Management Information System Action Plan
2. The detail of the action.
3. The rationale for taking the action.
4. The agency or sector which will take the lead in application
5. The agency(ies) sector(s) that will support the action or provide funding.
6. The priority (in terms of time) placed on the action will:
 - 1 Priority 1 - Indicate a **short** term action in 2006-2007
 - 2 Priority 2 - Indicate a **medium** term action in 2008-2010
 - 3 Priority 3 - Indicate a **longer** term action in 2011-2015

| A Organisation Action Plan | | | | | |
|-----------------------------------|--|--|--------------------------------------|----------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| A.1. | Adoption of T.M.P. | Development of Tourism Sector | Presidency/P.C.T./ Executive council | MCT | I |
| A.2. | Establish T.M.P. Implementation Organization | Ensure implementation of TMP (2006-2008) | Presidency/P.C.T. | MCT | I |
| A.3. | Appoint relevant international consultants for three years | Experience of 'best practice' required | FGN | UNDP | I |
| A.3. (1) | Appoint Project Director/ Co-ordinator | Experience of 'best practice' required | FGN | MCT | I |
| A.3. (2) | Appoint International N.T.A. Management Organization Expert (18 man month Input) to while with the Chief Executive (NTA) | Tourism Management organization experience required | FGN | TMPIO | I |
| A.3. (3) | Appoint International Marketing Expert (18 man month input) | Tourism Marketing expertise required | FGN | TMPIO | I |
| A.3 (4) | Appoint Tourism Development Cultural Expert (24 man month Input) | Tourism development expertise required | FGN | TMPIO | I |
| A.3. (5) | Running T.M.P. Secretariat (local experts, personnel, equipment and office costs) (3years) | | TMPIO | FGM | I |
| A. 4. | Implement new Visa regime | Current regime obstacle to tourism | FGN | | I |
| A.5. | Present Nigeria Tourism Bill (2006) to National Assembly (Presidential bill) | Strengthen Tourism Organization | Presidency | MCT | I |
| A.6. | Establish Nigeria Tourism Authority (NTA) and office | Policy direction and Monitoring | FGN | Chief Executive/ NTA | I |
| A.7. | Organize International Study Tour | Exposure to 'Best Practice' in Tourism | TMPIO | MCT | I |
| A.8. | Establish Convention Bureau | Create specific purpose organization to secure conference business for Nigeria | TMPIO/Private Sector | Chief Executive/ NTA | I |
| A.9. | Organize seminars to communicate TMP to stakeholders | Promote awareness of TMP | Chief Executive/ NTA | TMPIO | I |

| B Product Development Action Plan | | Rationale | Lead | Support | Priority |
|--|---|---|---|---------------------|-----------------|
| No | Action | | | | |
| B.1. | Identify and secure additional investment to conclude the second stage of the development of the Tinapa Business Resort to include hotel accommodation and conference facilities | Ensure completion of the tourism and leisure dimension at Tinapa Business Resort | Cross River State | TMPPIO | I |
| B.2. | Prepare a feasibility study/business Plan for Cross River National Park Tropical Rainforest. Identify international financial support for this project | Assess the commercial viability of developing the National Park as an internationally recognizable Rainforest. | Cross River State/Consultants | TMPPIO | I |
| B.3. | Prepare Business Development/Marketing Plan for Conference Capital cluster | Increase conference business | - Kogi State - Nasarawa State - Federal Capital Authority | TMPPIO /Consultants | I |
| B.4. | Prepare feasibility study /business plan for Olokala Cultural Resort and Master plan | Make access commercial viability to attract investors | Ogun / Ondo States | TMPPIO /Consultants | I |
| B.5. | Prepare feasibility study/business plan for Museum of Traditional Nigerian architecture | Make museum more attractive | Jos State | TMPPIO /Consultants | I |
| B.6. | Prepare restoration plan for Ancient City of Kano. Undertake Pilot – project | Make Kano more attractive to tourists | Kano State | TMPPIO /Consultants | I |
| B.7. | Prepare feasibility Study/business plan for Farin Ruwa Eco Tourism Project | Access commercial viability and create Eco Tourism Product | Nasarawa State | TMPPIO /Consultants | |
| B.8. | Introduce New Classification and grading Scheme for hotels and other accommodation | Improve standards of accommodation | NTA | TMPPIO /Consultants | I |
| B.9. | Appoint consultant engineers and architects to design the National Lodge and Accommodation Units to be developed in each of the identified National Parks (Cross River, Yankari, Gashaka Gumpti, and Lake Kanji), | Develop a standard set of plans for the development of similar styled (but different scale) of accommodation at each of the National Parks being developed. | National Parks Commission | TMPPIO | I |

| B Product Development Action Plan | | Rationale | Lead | Support | Priority |
|--|--|---|-------------------|----------------|-----------------|
| No | Action | | | | |
| B.10. | Appoint consultant architects/engineers and land planners to design interpretation centres, visitor facilities, to include catering, retail, parking and restroom visitor amenities at all flagship and supporting projects. Finalisation all designs with the identified timetable within one year. | To standardise in accordance with national and regional preferences the design layout and usage of all lands in and around all strategically identified tourist attractions identified in the T.M.P | TMPIO | Consultants | I |
| B.11. | Improve all road access to potential tourist sites | Enhance accessibility | Ministry of Works | M.C.T. | I |
| B.12. | Undertake feasibility study/business plan for the International Slave Route project linking all Nigerian slave route location to other African Slave Ports and international slave destination points. Organize Slave Route convention | Evaluate the viability of establishing Nigeria as the centre of the international Salve Routes and develop markets to justify investment | PCT/MCT | TMPIO | I |
| B.13. | Development of Farin Ruwa Eco Tourism Project | Priority | Nasarawa State | TMPIO | I |
| B.14. | Undertake feasibility studies/ Business Plans to determine feasibility, content other supporting projects in each cluster and site of regional significance | Develop critical part of tourism facilities and markets to justify investment | PCT/MCT | TMPIO | I |
| B.15. | Identify all state owned and operated hotels to be made available for privatization. | Initial preparation for the privatization of state owned and operated hotels | State Governments | MCT | I |
| B.16. | Complete privatization process of all state owned and operated hotels. | Transfer of ownership/ operation of state owned hotels to private management/ownership | State Governments | NTA | 2 |
| B.17. | Prepare Historic Sites Conservation Plan | Identify conservation priorities at key historic sites | MCT | NTA/ TMPIO | I |
| B.18. | Prepare Arts and Crafts Development Plan | Identify unique craft skills and strategy | MCT | | 2 |

| B Product Development Action Plan | | | | | |
|--|---|---|---------------------|-------------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| B.19. | Complete customer service excellence training for all guides and interpretation staff at all identified tourist attractions | Prepare and professionalize staff in the area of customer service | NTA | TMP project team | 2 |
| B.20. | Secure opening of Emirs Palaces to visitors | Make Emirs Palaces available as a tourism and cultural attraction | Relevant States | MCT/ NTA TMPIO | 2 |
| B.21. | Submit inputs into the development of the proposed National Centre of Culture in Abuja including new National Culture Show | Ensure design of new national Cultural Centre optimises its tourism potential | MCT | TMPIO | I |
| B.22. | Based on completed feasibility studies shortlist all tourism projects to be proceeded with and complete construction and development budget and identify financial sources for projects | Set development priorities and outline investment requirement for overall tourism development | PCT | MCT/ TMPIO | I |
| B.23. | Regeneration of Onikan area of Lagos city | Establish visitor friendly environment | Lagos State | TMPIO | I |
| B.24. | Develop further support for Tinapa Leisure and Conf. Resort | Flagship project | Cross River State | TMPIO | 1/2 |
| B.25. | Develop Cross River National Park Tropical Rainforest (subject to feasibility) | Flagship project | NPC | Ministry of Environment | 1/2 |
| B.26. | Develop Conference Hosting/Management capability in Abuja | Flagship project | Private sector /NTA | TMPIO | 1/2 |
| B.27. | Develop Olokola cultural Resort (subject to feasibility) | Flagship project. International Private sector initiative | Ogun / Ondo States | TMPIO | 1/2 |
| B.28. | Restore/upgrade Museum of Traditional Nigerian Architecture (subject to feasibility) | Flagship project | MCT | TMPIO | 1/2 |
| B.29. | Develop and restore Ancient city of Kano (subject to feasibility) | Flagship project | Kano State | TMPIO | 1/2 |
| B.30. | Develop Supporting Projects in each cluster (subject to feasibility) | Cluster Development | As may apply | MCT | 2/3 |
| B.31. | Develop Sites of Regional Significance (subject to feasibility) | Strengthen Clusters | As may apply | NTA | 2/3 |

| B Product Development Action Plan | | | | | |
|--|--|--------------------------------|-------------------------|----------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| B.32. | Implement environment enhancement programme | Improve environmental | Ministry of Environment | NTA | 2/3 |
| B.33. | Implement Festivals and Events Development programme | Product development initiative | MCT | NTA | 2/3 |

| C Access and Internal Transport Action Plan | | | | | |
|--|--|---|----------------------|---------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| C.1. | Upgrade Domestic Airports | To provide more comfortable facilities to increase regional tourism | Ministry of Aviation | Ministry of Finance | 1 |
| C.2. | Provide additional Coaches and Car Hire vehicles | To ensure greater choice of vehicles | Private Sector | NTA | 2 |
| C.3. | Introduce revised Visa Regime | To make Nigeria more attractive to visit | Immigration | NTA/ MCT | 1 |

| D Marketing Action Plan | | | | | |
|--------------------------------|--|--|-----------------|----------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| D.1. | Implement co-ordinated marketing programme 2006-2010 | Promote tourism products to target markets | NTA | TMPIO | I |
| D.2. | Prepare guidelines for new brand. Appoint specialist Branding Agency | Positioning of Nigeria | PCT | MCT TMPIO | I |
| D.3. | Design and development of new brand | Positioning of Nigeria | Branding Agency | TMP TMPO | I |
| D.4. | Select and contract Market Representatives in main markets | Specialist support required | TMP Secretariat | TMPIO | I |
| D.5. | Select and contract P.R. Agency | Specialist support required | TMP Secretariat | TMPIO | I |

| D Marketing Action Plan | | Rationale | Lead | Support | Priority |
|--------------------------------|---|---|------------------------|--------------------------|-----------------|
| No | Action | | | | |
| D.6. | Package and promote Abuja Carnival through selected Tour operators. Privatize Carnival Management | Cultural Tourism initiative | PCT | TMPIO | I |
| D.7. | Undertake Market Research in International and Regional markets | Information necessary to inform marketing campaigns | NTA | TMPIO | I |
| D.8. | Compile database of International Tour operators to be targeted | Ordered planning | NTA | Market Representatives | I |
| D.9. | Compile database of Tour operators and Travel Agents in African Markets | Ordered planning | NTA | Market Representatives | I |
| D.10. | Compile database of Professional Conference organizers (PCOs), Multinational | Ordered planning | Convention Bureau | NTA | I |
| D.11. | Compile media contact list | Ordered planning | Market Representatives | NTA | I |
| D.12. | Design and Print collaterals including Destination brochure, Travel Trade Manual, Conference Guide, Product Brochures | Tools necessary for effective marketing | NTA | Convention Bureau/TMPIO | I |
| D.13. | Establish Photo Library and prepare C.D. ROM | Establish 'Image Bank' for use by N.T.O. and private sector | NTA | TMPIO | I |
| D.14. | Together with local hotels and ground handlers prepare cultural tourism products/packages | Very few 'products' or 'experiences' currently in place | NTA | Tourism Industry / TMPIO | I |
| D.15. | Set up co-operative marketing initiatives with Airlines and Major hotel groups | Cost effective approach to marketing | NTA | TMPIO | I |
| D.16. | Agree programme of P.R. activities including Press releases, Tourism Ambassador Programme | Ordered planning | MCT | Market Representatives | I |
| D.17. | Select and contract Advertising Agency | Specialist support required | MCT | NTA/TMPIO | I |
| D.18. | Select and contract web development/internet agency | Specialist support required | MCT | NTA/TMPIO | I |

| D Marketing Action Plan | | | |
|--------------------------------|--|--|------------------------|
| No | Action | Rationale | Priority |
| D.19. | Agree Programme of Travel Trade Promotions/workshops to be attended | Ordered planning | MCT |
| D.20. | Attend Travel Trade Promotions/workshops | Develop relationships with Travel Trade | NTA |
| D.21. | Make sales calls to Tour Operators, Airlines, Travel Agents etc. | Develop relationships with Travel Trade | NTA |
| D.22. | Distribution of Destination Brochure, Travel Trade Manual, Product Guide to Travel Trade | Raise awareness of Nigeria | Market Representatives |
| D.23. | Distribution of Conference Guide to PCOs, Multinational Companies and Associations | Raise awareness of Nigeria | NTA |
| D.24. | Organization of Familiarization visits for Tour Operators and Media | Raise awareness of Nigeria | Market Representatives |
| D.25. | Pro-active use of the internet. Ensure information is up to date | Cost effective communication tool | NTA |
| D.26. | Organize Familiarization visits for PCOs, Multinationals and Associations | Address current 'lack of awareness' of Nigeria's tourism offer | NTA |
| D.27. | Develop special interest products/packages | Address deficiencies in current offer | NTA |
| D.28. | Implement Destination advertising campaign | Increase visitors | NTA |
| D.29. | Advertising campaign for Festivals and Events | Increase visitors | NTA |
| D.30. | Conferences/meetings Advertising campaign (ongoing) | Increase visitors | Convention Bureau |
| D.31. | Advertising Campaign for Domestic Market (ongoing) | Increase visitors | NTA |

| D Marketing Action Plan | | | | | |
|--------------------------------|--|---|--------------------------|--|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| D.32 | Benchmark and Monitor Year I Marketing activities | Ensure strategy on schedule within budget parameters | Fed. Ministry of Finance | TMPIO | |
| D.33. | Undertake research with International and Regional Travel Trade to inform medium term strategies | Feedback | NTA | TMPIO | 2 |
| D.34. | Implement P.R. and communications campaign in key markets | Address image issue/increase visitors | NTA | Ministry of Information and National Orientation | 2 |
| D.35. | On-going liaison/targeting of international/Regional Travel Trade | Relationship building/increase visitors | Market Representatives | NTA | 2 |
| D.36. | Distribution of marketing collaterals (ongoing) | Increase visitors | Market Representatives | NTA | 2 |
| D.37. | Organization of Familiarization visits for Tour operators and media (ongoing) | Increase trade awareness of product offer/increase visitors | NTA | Marketing Representatives | 2 |
| D.38. | Implement Destination advertising campaign | Increase visitors | MCT/NTA | Marketing Representatives | 2 |
| D.39. | On-line information provision and marketing activities (ongoing) | Increase visitors | MCT/NTA | TMPIO | 2 |
| D.40. | Advertising campaign for Festivals and Events | Increase visitors | NTA | Marketing Representatives | 2 |
| D.41. | Conferences/meetings Advertising campaign (ongoing) | Increase visitors | Convention Bureau | NTA | 2 |
| D.42. | Advertising Campaign for Domestic Market (ongoing) | Increase visitors | NTA | | 2 |
| D.43. | Attendance at Travel Trade ,Workshops and Promotions (ongoing) | Relationship building/increase visitors | Market Representatives | NTA | 2 |

| D Marketing Action Plan | | | | | |
|-------------------------|--|--|------|---------|----------|
| No | Action | Rationale | Lead | Support | Priority |
| D.44. | Benchmark and Monitor Progress (ongoing) | Ensure strategy on schedule and within budget parameters | NTA | MCT | 2 |

| E HRD Action Plan | | | | | |
|-------------------|---|---|--|--------------------------|----------|
| No | Action | Rationale | Lead | Support | Priority |
| E.1. | Appoint Tourism Training Organization Expert (12 man month input) | Tourism Training org. expertise required | TMP Secretariat | MCT | I |
| E.2. | Appoint Tourism Training Education Expert (12 man month input) | Tourism Training education expertise required | TMP Secretariat | MCT | I |
| E.3. | Legally establish National Institute for Culture and Tourism Studies (NICT). Consult with stakeholders and obtain inputs. Establish mission and areas of core focus and development plan. | Strengthen Culture and Tourism Training | MCT | TMPIO | I |
| E.4. | Participating institutions to define their Educational Visions and Missions. Then define programmes, programme aims, objectives and intended outcomes | Improve quality of teaching | NICT/ NTA | TIMPO | I |
| E.5. | Identify suitable international partners. Establish links and exchanges. Key Nigerian academics to attend suitable international programmes | Improve teaching standards | MCT/ NICT | TIMPO | I |
| E.6. | Carry out research, agree details, arrange funding, define responsibilities, establish links and planning of the Abuja Culture Tourism and Hospitality College | Provide new Culture and Tourism institution | MCT/ NICT | International consultant | I |
| E.7. | Identify suitable locations for new school facilities in Kaduna and Lagos | Improve facilities | NICT | TMPIO | I |
| E.8. | Upgrade facilities for Yaba College and Kaduna Polytechnic. | Improve facilities to cater for training in tourism and hospitality | Federal Ministry of Education/ NICT | TMPIO | I |
| E.9. | NUC to agree and publish clear guidelines for Honour degree and Masters programmes | University programmes | NICT University Accreditation | TMPIO/ Consultant | I |

| E HRD Action Plan | | | | | |
|--------------------------|---|--|-------------------------------|-------------------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| E.10. | Identify secondary school pilot project locations. Agree programmes content. Develop suitable facilities within key cluster areas | Improve training facilities | NICT | TMPIO | 1 |
| E.11. | Visits to partner institutions, research for new programmes, institutional resources expansion | Ongoing academia and academic programmes development | NICT | TMPIO | 1 |
| E.12. | Ongoing Polytechnics and Hotel Schools upgrades | Improve facilities | Federal Ministry of Education | TMPIO/ Consultant | 2 |
| E.13. | Ongoing improvements at Hotel Schools | Hotel School upgrades | NICT | TMPIO | 2 |
| E.14. | Complete construction of Abuja College | Expanded culture and Tourism Training | MCT/ NICT | TMPIO/ Consultant | 2 |
| E.15. | Investment in suitable University facilities and programmes support subject to potential for accreditation | Improved university programmes | NICT | TMPIO | 2 |
| E.16. | Develop new QA scheme, modus operandi, accountabilities | Training Quality Assurance Service | NICT | TMPIO Consultant | 2 |
| E.17. | Develop further Secondary Vocational facilities in new emerging tourism cluster areas | Secondary Vocational Schools | NICT | TMPIO | 2 |
| E.18. | Visits to partner institutions, research for new programmes, institutional resources expansion | Ongoing academia and academic programmes development | NICT | TMPIO | 2 |
| E.19. | Ongoing improvements at Hotels Schools | Hotel School upgrades | NICT | | 3 |
| E.20. | Visits to partner institutions, research for new programmes, institutional resources expansion | Ongoing academia and academic programmes development | Federal Ministry of Education | NICT/ TMPIO/ Consultant | 3 |

| F TSA Implementation Action Plan | | | | | |
|---|---|---|------------------------------|---|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| F.1. | Appoint TSA Expert | TSA Expertise required | TMPIO | | I |
| F.2. | Undertake the collection, processing and analysis of 2005 (and subsequent years) international arrival (migration) statistics at all international airports | Monitor visitor numbers arriving in the country | TSA Implementation Committee | NPC/NBS NTA | I |
| F.3. | Undertake the collection, processing and analysis of 2005 (and subsequent years) international arrival (migration) statistics from major border crossings. NTO staff to undertake. | Monitor visitor numbers arriving across land borders. | TSA Implementation Committee | NTA/NBS | I |
| F.4. | Introduce revised migration forms and supply to airlines and border crossing posts. | Establish recommended changes to migration form to monitor arrivals | TSA Implementation Committee | NTA/ Nigeria Immigration Service | I |
| F.5. | Undertake 2 interview waves of recommended exit survey at international airports. Commission market research company to design and coordinate interviewing and data analysis. | Monitor visitor mix, activities and spending within Nigeria | NTA | NBS | I |
| F.6. | Establish a programme to measure domestic travel incidence. Insert questions in the household omnibus research survey incidence, activities undertaken and spending within the country by resident population. | Establish incidence, activities and spending on domestic travel. | NTA | Market Research company | I |
| F.7. | Undertake market surveys on domestic niche markets such as festival/events, national parks, religious events etc | Establish level of patronage, origin of participants and spending | NTA | NBS | I |
| F.8. | Train 2 x NBS officers from National Accounts division in TSA methodology and analytical techniques. 1 week trip to Canada for course with Tourism Canada. | Training in TSA analytical techniques | NBS | NTA | I |

| F TSA Implementation Action Plan | | | | | |
|---|--|--|--|----------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| F.9. | Undertake Workshops for NTO staff in interpretation of TSA Account system and their implications for the tourism industry. | Improve knowledge, understanding and ability to interpret TSA Account system | WTO/UNDP/ International Consultant | NBS/ CBN | I |
| F.10. | Undertake training and advisory input with NTO on design, data collection and analysis of data from international surveys economic data analysis and integrate into the TSA system. Three (3) man months input. | Training and quality control of data analysis and manipulation for TSA system. | WTO/UNDP International Consultant | NTA | I |
| F.11. | Purchase of computer equipment, software and associated resources to undertake data analysis and manipulation on niche surveys. Collation and distribution of quarterly and annual tourism statistics (electronically) to stakeholders | Ensure equipment available for wide spread distribution of tourism statistics to Nigerian stakeholders | NTA | NBS | I |
| F.12. | Undertake 2 interview waves of ongoing exit survey programme at international airports. Commission market research company to coordinate interviewing and data analysis. (Budget year 2007) | Monitor visitor mix, activities and spending within Nigeria | NTA | NBS | I |
| F.13. | Undertake training and mentoring of NBS National Accounts staff in implementation of TSA methodology and analysis. (Three month man input) (Budget year 2007) | Hands on practical instruction in applying TSA methodology to National Accounts | UNDP/ International Consultant | NBS | I |
| F.14. | Undertake hotel revenue and operating cost survey for top and middle level hotels. (Budget year 2007) | Establish a benchmark measure of hotel revenues and costs for TSA system | NTA | NBS | I |
| F.15. | Undertake ongoing domestic market research programme into niche market areas to establish incidence and spending levels (Budget year 2007) | Establish economic contribution of niche markets to economy | NTA | | I |

| F TSA Implementation Action Plan | | | | | |
|---|--|---|--------------------------------------|----------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| F.16. | Undertake review of NBS National Accounts staff in implementation of TSA methodology and analysis. Prepare 2007 Benchmark Tear TSA Accounts for publication. (Three month man input) (Budget year 2008) | Hands on practical instruction in applying TSA methodology to National Accounts | UNDP/ International Consultant | NBS/ NTA | 2 |
| F.17. | Undertake 2 interview waves of ongoing exit survey programme at international airports and at key land border posts. Commission market research company to coordinate interviewing and data analysis. (Budget year 2008) | Monitor visitor mix, activities and spending within Nigeria | NTA | NBS | 2 |
| F.18. | Undertake hotel revenue and operating cost survey for top and middle level hotels. (Budget year 2008) | Establish a benchmark measure of hotel revenues and costs for TSA system | NTA | NBS | 2 |
| F.19. | Undertake ongoing domestic market research programme into niche market areas to establish incidence and spending levels (Budget year 2008) | Establish economic contribution of niche markets to economy | NTA | NBS | 2 |
| F.20. | TSA Implementation Costs | - | TSA Implementation Committee | TMPIO | I |

| G Investment and Incentives Action Plan | | | | | |
|--|--|--|-------------|---------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| G.1. | Amend incentives offered by the Nigerian Investment Promotion Commission. | Need to be more specific/relevant to tourism sector | FGN | NPC. | I |
| G.2. | Prepare new high quality Investment/Brochure. Organize Investment Conference in London | Attract potential investors | NTA | MCT/ NPC | I |
| G.3. | Develop a grant aid scheme for existing and new enterprises in nominated tourism clusters | Guide allocation of grant aid to tourism sector | MCT | NTA/ TMPIO | I |
| G.4. | Ensure that incentives are directed to qualifying enterprises in nominated tourism clusters | Channell investment in to clusters | MCT | NTA/ TMPIO | I |
| G.5. | Ensure that incentives are applied to registered premises where an appropriate registration scheme exists | Develop quality tourism enterprises | NTA | | I |
| G.6. | Extend duty free on imported kitchen and restaurant equipment being installed as part of renovation projects | Encourage investment/upgraded by owners of enterprises | Presidency | Ministry of Finance | I |
| G.7. | Relax import prohibition on items of quality linen, tableware etc. | Improve standards in tourism enterprises | Presidency | Ministry of Finance | I |
| G.8. | Consolidate levies and fees extracted from the hospitality sector | Reduce tourism enterprise operating costs | Presidency | Ministry of Finance | I |
| G.9. | Establish Tourism Development Fund | Assist development | FGN | TMPIO | I |

| H Tourism Management Information System Action Plan | | | | | |
|--|--|---|---------------------------|--------------------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| H.1. | Implement an efficient Tourism Management Information System | Ensure proper planning, development and marketing of tourism sector | NTA | MCT/ Department of Information | I |
| H.2. | Implement Arrival and Departure Registration System | Track individual visitors entering the country | Department of Immigration | NTA/ MCT | I |
| H.3. | Introduce new arrival and departure forms for Nigeria | Ensure collection of reliable tourist arrival statistics | Department of Immigration | NTA/ MCT | I |

| H Tourism Management Information System Action Plan | | | | | |
|--|---|---|-----------------------------|------------------------------|-----------------|
| No | Action | Rationale | Lead | Support | Priority |
| H.4. | Conduct visitor surveys in accordance with best international practice | Obtain visitor profile characteristics and travel behavior patterns for tourism planning and marketing purposes | NTA | TMPIO | I |
| H.5. | Compile tourism accommodation statistics in accordance with best international practice | Provide information on the capacity and utilization of commercial accommodation | NTA | TMPIO | I |
| H.6. | Collect and compile tourism employment statistics | Measure level of direct employment as a result of tourism | Federal office of Statistic | National Managers Board/ NTA | I |

KEY TO ABBREVIATIONS AND ACRONYMS

| | |
|--------------|---|
| TMPIO | TOURISM MASTER PLAN IMPLEMENTATION ORGANIZATION |
| FGN | FEDERAL GOVERNMENT OF NIGERIA |
| PCT | PRESIDENTIAL COMMITTEE ON TOURISM |
| MCT | MINISTRY OF CULTURE AND TOURISM |
| NDP | UNITED NATIONS DEVELOPMENT PROGRAMME |
| NPC | NATIONAL PARKS COMMISSION |
| NIPC | NIGERIAN INVESTMENT PROMOTION COMMISSION |
| CBN | CENTRAL BANK OF NIGERIA |
| NBS | NATIONAL BUREAU OF STATISTICS (FORMERLY: FOS, FEDERAL OFFICE OF STATISTICS |
| NPC | NATIONAL POPULATION COMMISSION |
| NTA | NIGERIA TOURISM AUTHORITY |
| TMP | TOURISM MASTER PLAN |
| NICT | NATIONAL INSTITUTE FOR CULTURE AND TOURISM |

NOTE: THE IMPORTANCE AND CHRONOLOGICAL FOLLOW UP OF THE ABOVE DETAILED ACTION PROGRAMMES CAN NOT BE OVER-ESTIMATED: THE PROGRAMME SHALL REQUIRE INTERNATIONAL CONSULTANTS IN THE AREAS OF:

- MANAGEMENT AND CO-ORDINATION OF ALL PROGRAMMES
- SETTING UP THE NTA
- TOURISM PRODUCT DEVELOPMENT
- MARKETING
- TOURISM SATELLITE ACCOUNTS
- HOTEL/ACCOMMODATION CLASSIFICATION AND GRANDING
- TRAINING AND ESTABLISHMENT OF THE TOURISM AND CULTURE TRAINING INSTITUTIONS
- FEASIBILITY STUDIES/BUSINESS PLANS

WHILE FUNDING FOR THESE CONSULTANTS CAN BE SOURCED FROM THE INTERNATIONAL ORGANIZATIONS, FEDERAL GOVERNMENT SHOULD BE READY WITH COUNTPART FUNDING. IN ALL CASES WHERE THE TMPIO IS INVOLVED, AN EXPERT SHALL BE AVAILABLE TO PROPEL EVERY SECTOR AS AFFECTED. THE TMPIO INVOLVEMENT IN MAJOR ISSUES IS IMPERATIVE SINCE IT WILL BE OPERATING UNDER THE PERVUE OF THE PRESIDENT AND P.C.T. IT WILL REGULARITY TAKE DIRECTIVES AND REPORT BACK. THE TMPIO SHALL ALSO BE RESPONSIBLE FOR THE IDENTIFICATION AND SOURCING OF FUNDING OF THE TOURISM MASTER PLAN ACTIONS. THE IMPLEMENTATION OF THE TMP SHOULD BE STRICTLY CONTROLLED BY THE PRESIDENCY TO MAXIMIZE SUPPORT FOR THE INTERNATIONAL ORGANIZATIONS.

6.3 Project funding

The cost of implementing the Tourism Master Plan in accordance with the strategic recommendations outlined will be presented by the Tourism Master Plan Implementation Organization as the programmes fall in to place. An initial conservative budget has been submitted through the Federal Ministry of Culture and Tourism to be considered in the 2006 budget for the jump starting of the implementation of the Tourism Master Plan. It is recommended that this budget should be placed under the TMPIO in the Presidency when appointed.

The implementation of the Tourism Master Plan will initially be funded from two main sources, namely the government (Federal and State) and International Funding Agencies. Investment in the Nigeria tourism product and infrastructure by government with the support of international funding agencies will stimulate the private sector interest while the establishment and the Tourism Development Fund shall stimulate rapid back-up funding of the programmes.

An early action for the TMP Implementation Organization will be to identify sources of funding and investor and technical assistance for each of the actions as identified in the Action Programme. It is anticipated that the main sources of funding will be generated from the following sources:

- Federal Government
- State Government
- Private Sector (domestic)
- Foreign private investment
- U.N.D.P.
- World Bank
- European Union
- Other International Funding Agencies
- International Labour Organization
- Bi-lateral government aid *
- Other (including Sponsorship) **

* THE GOVERNMENT OF GERMANY HAS FINANCED THE RECONSTRUCTION OF PART OF KANO CITY WALLS

** IN A NUMBER OF COUNTRIES MULTI – NATIONAL COMPANIES HAVE BEEN SUCCESSFULLY TARGETED TO FUND ENVIRONMENTAL ENHANCEMENT PROGRAMMES