


The Contribution of Africa's Tourism to Sustainable Development Goals: A Cluster Analysis on Employment, Decent Work, and Gender Equality

Abstract

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Tourism is critical in driving socioeconomic progress, particularly in regions like Africa. Despite its growth trajectory, Africa must catch up to other continents in tourism development. Nonetheless, the sector holds immense potential to advance Sustainable Development Goals (SDGs). However, the extent to which tourism impacts SDGs, especially concerning labour market dynamics such as access to resources, decent work, and gender equality, remains underexplored at a global level and within the context of the global South. This paper addresses this gap by analysing statistical indicators and employing a cluster analysis to categorise these countries based on tourism's significance in the labour market, decent work and gender equality. The results reveal three different clusters with distinct levels of reliance on tourism, job creation, and achievement of decent work for all. There are also challenges in gender equality and suboptimal youth employment. Through this exploration, the paper contributes to a deeper understanding of how tourism intersects with sustainable development imperatives, particularly in the context of labour dynamics and gender equality in Africa.

Keywords: Tourism, sustainable development goals, access resources to all, gender equality

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Introduction

Tourism is essential in fostering the socioeconomic development of many countries and regions, and Africa is no exception. Over the years, Africa has become an interesting tourist destination, offering diverse cultures, artistic expressions, landscapes, biodiversity, and experiences (Christie et al., 2013; Rodríguez-Antón, 2020). In Africa, tourism has been growing steadily over the years, but the continent still lags behind other regions in terms of overall tourism development. Africa recorded 5.2% of the international tourist arrivals in the world in 2023, compared to Europe (54.5%), Asia and the Pacific (18.2%), the Americas (15.4%), and the Middle East (6.8%). However, between 2005 and 2023, the number of international tourist arrivals had an average annual growth rate of 3.6%, higher than in Europe, the Americas, Asia and the Pacific. Since tourism is one of the world's most important industries, it can significantly impact achieving sustainable development, embracing development's economic, social, and environmental dimensions (Chiwawa & Wissink, 2023; Shereni, 2019). Tourism can be crucial in advancing the Sustainable Development Goals (SDGs) by fostering economic growth, cultural exchange, social inclusiveness, employment, and poverty reduction while promoting environmental conservation and community well-being (Mohale et al., 2020; United Nations World Tourism Organization [UNWTO], 2018). The relevance of tourism is even more crucial in developing and emerging countries (Adu-Ampong, 2018; Siakwah et al., 2020), such as most African countries, which still have low sustainable development indicators. The score of the Sustainable Development Index 2023, the percentage towards SDG performance, was 66.7 in the world, and from the 42 African countries for which this index was calculated 36 (86%) have scores below the world average (Sachs et al., 2023). Tourism exhibits a substantial capacity to create employment, significantly impacting the labour market. Labour is the most important resource accessible to impoverished individuals globally, serving as their primary source of income generation (United Nations, 2009). Tourism's contribution to job creation, notably for specific groups such as women and youth, is fundamental, especially in developing countries. However, the tourism sector grapples with significant decent work challenges that must be addressed comprehensively to fully harness its potential for fostering socioeconomic development. Through the labour market, tourism, a labour-intensity industry in which female participation is high, can be an enabler of some SDGs, particularly access to resources for all, decent work, and gender equality, boosting female empowerment. However, some of the literature emphasises that many tourism businesses prioritise profit over fair treatment of their employees, often resorting to underpaying and exploiting workers, including vulnerable groups like women and youth (Scheyvens, 2012). This practice goes against the principles of SDGs, particularly SDG 5 (Gender Equity), SDG 8 (Decent Jobs), and SDG 10 (Reduced inequalities), as outlined by the United Nations in 2015. Most of the literature on the relationship between tourism and the achievement of SDGs in Africa focuses on case studies in particular segments of the tourism industry (Bacari et al., 2021; Dube, 2021; Mabibibi et al., 2021; Madeira & Silveira, 2020; Nwosu, 2014), while studies are scarce at a global level. Besides, limited investigations have been conducted on the global South, yet it is a focal point within the SDGs (Mabibibi et al., 2021). Thus, this article aims to analyse some statistical indicators that explore whether tourism impacts SDGs particularly those related to the labour market, such as access to resources for all, decent work, and gender equality in African countries, a continent that presents substantial challenges in these areas. Cluster analysis is also used to group these countries into homogeneous groups based on indicators of tourism's significance in the labour market.

Literature review

The declaration by the United Nations of 2017 as the International Year of Sustainable Tourism for Development was a recognition of the potential of tourism to foster economic, social, and environmental development. This was particularly important in the context of the 2030 Agenda for Sustainable Development and the SDGs as part of the Agenda. Tourism is



addressed explicitly in three of the Global Goals (8, 12 and 14). However, it is widely acknowledged that tourism can directly or indirectly support all 17 SDGs (Saarinen, 2020; Sharples, 2020). From a social point of view, tourism creates jobs for all, can promote decent work for all, fosters inclusivity through job opportunities for women and youth, empowers women, promotes gender equality, and reduces inequalities. Thus, this investigation will focus on Goal 8 - Decent work and economic growth, specifically employment development and job creation (Target 8.3), decent work for all (Target 8.5), and youth unemployment (Target 8.6); Goal 5 - Gender equality, specifically, women's equal rights to economic resources (Target 5.a.); and Goal 10 – Reduced inequalities, specifically promote social, economic and political inclusion (Target 10.2.) and achieve greater equality (Target 10.4.). From the social point of view, tourism can create employment opportunities for both men and women (European Institute for Gender Equality [EIGE], 2017; UNWTO & United Nations Entity for Gender Equality and the Empowerment of Women [UN Women], 2011), and the sector's interconnection with other industries also generates additional job opportunities. Tourism is labor-intensive, with a high proportion of female workers, and the growth of tourism over the years has facilitated female employment (Jackman, 2022). "In developing countries where women have less access to education and often have greater household responsibilities, the low barriers to entry, flexible working hours, and part-time work [in tourism] present potential opportunities for employment" (UNWTO & UN Women, 2011: vii). Additionally, "Tourism can also help poor women break the poverty cycle through formal and informal employment, entrepreneurship, training, and community betterment" (UNWTO & UN Women, 2011: vii). Tourism can promote gender equality and empower all women and girls. The Equality in Tourism organization was established with the primary objective of integrating gender considerations into tourism development, which is crucial since women play a significant role in the industry's workforce, comprising nearly half of the formal sector. However, they are disproportionately represented in lower-paying, unskilled positions and often work in gender-segregated environments, limiting their access to higher-paying jobs and training opportunities (Baum, 2013; UNWTO, 2019; Vettori & Nicolaidis, 2019). Additionally, women are significantly underrepresented in management roles (Freund & Hernandez-Maskivker, 2021; Hutchings et al., 2020; UNESCO et al., 2023), and there exists the glass ceiling (Mwashita et al., 2020).

Moreover, the exclusion of women from equitable participation not only impacts them individually but also detrimentally affects their communities and societies as a whole. Thus, addressing gender disparities in tourism is essential for fostering fair and inclusive development within the industry and beyond (Equality in Tourism, n.d.) and often arises in response to economic, social, and geographic inequalities, leaving certain groups excluded from participating in the tourism economy (Lekgau et al., 2024). The role that tourism can play in gender equality is also recognised in the literature (EIGE, 2017; Freund & Hernandez-Maskivker, 2021; Jackman, 2022; Shereni, 2019; UNWTO, 2019). Gender equality is a fundamental human right (Jackman, 2022) and aims to enhance the welfare of all individuals (Milner et al., 2020), and the attention has predominantly centred on the needs and rights of women and girls (Susan & Natu, 2023). This importance is recognised in Goal 5, as well as empowering all women and girls. To the World Bank (2023: x), "Empowering women is not just a matter of social justice. It is a prerequisite for economic development". Despite the progress in this area, and according to the 2023 World Economic Forum's Global Gender Gap Report (World Economic Forum, 2023), no country worldwide has achieved complete gender parity. In African countries, the situation is very uneven: while Namibia is among the top ten countries worldwide regarding gender parity, Chad, Algeria, Mali, the Democratic Republic of Congo, and Guinea are among the ten lowest-performing countries. Scheyvens (2018) considers that the tourism sector shows a deficiency in addressing SDG 5, particularly concerning the treatment of women within the industry. Worldwide, women in the tourism industry face significant disadvantages compared to their male counterparts. They typically earn lower wages and are often clustered in lower-tier positions of lesser quality (Baum, 2013). The World Bank (2018) has determined that the losses in wealth from inequality in earnings between men and women in the Sub-Saharan Africa region are estimated to be around 2.5 trillion USD. A growing body of research indicates that advancements in gender equality are associated with higher employment rates, enhancements in economic efficiency, and overall economic expansion (International Labour Organization, 2016; Macieira, 2017).

Jackman (2022), in a study of 143 countries from 2006 to 2017, found a positive relationship between tourism and gender equality in the labour market, but the impact is not homogeneous. In developed countries, the findings suggest that tourism positively correlates with gender equality. However, it demonstrates an inverse association with gender equality in Sub-Saharan Africa and has no impact in the Middle East and North Africa. Susan & Natu (2023), in a study of 44 African countries also conclude that development promotes gender equality. Gender equality is also linked to Goal 10 – target 10.2, which aims to promote economic and social inclusion, among other objectives. SDG 10 emphasises mitigating inequality within and among nations, and Target 10.4 envisages achieving greater equality. This goal is interlinked with others; unequal societies often struggle to meet environmental sustainability targets and are prone to heightened social discord (Kamp, 2023). Disparities in the distribution of resources and opportunities manifest across various aspects of existence. Promoting fairness in this distribution is essential for diminishing inequality within nations and across borders (United Nations, 2023). Income inequality is one of these facets, and the tourism sector can reduce inequality by generating new employment prospects and enabling individuals at the bottom of the income pyramid to participate in the industry (Subramaniam et al., 2022). However, tourism's redistributive impact may disproportionately benefit affluent individuals, exacerbating economic disparities.

Tourism also can be an important gateway to employment for young people, which is a challenge nowadays. In recent years, there has been a drop in the number of young people joining the tourism industry workforce. This decline is due to poor working conditions, skill shortages, and changing employment patterns within the tourism sector (Fernandez, 2023). Young people face underemployment due to a lack of work experience, leading to few prospects for career advancement within the sector (Booyens, 2020). Despite expectations of gaining better employment with experience, many still need to improve in low-



paying and unstable positions, contributing to high turnover rates among young professionals (Booyens, 2020; Walmsley, 2015). If tourism can be a significant source of employment, it also may promote decent work, as envisioned in Goal 8. Decent work comprises appropriate remunerations, job security, safe working conditions, and opportunities for professional development. Career growth, self-esteem, recognition, rewards, work environment, and relationships with management promotes quality of life (Supina & Singh, 2024). Given the spatially distributed nature of the tourism sector, its advantageous spatial effects during favourable conditions are reversed into detrimental consequences in bad times. Industries reliant on services, like tourism, often exhibit a substantial proportion of low-wage labour. Such workers, alongside those in the informal economy, typically lack adequate social protection coverage (Kamp, 2023). High-wage jobs provide greater economic security and well-being, reflect the value that organisations place on workers' skills and contributions, and are associated with better working conditions.

Methodology

This study aims to investigate the social impact of the tourism industry on the labour market and the achievement of respective targets of the SDGs, such as employment, decent work to all, gender equality, social inclusion, and greater equality in the tourism sector in African countries and to group countries according to these performances. Several methods were pursued to achieve the goals of the current study. First, a descriptive analysis was made through secondary data gathered from the World Travel & Tourism Council (WTTC) in 2021. Second, a cluster analysis was developed to identify subgroups of countries with different levels of the variables used in the descriptive analysis. A hierarchical cluster analysis was designed to determine the appropriate number of clusters, followed by the k-means cluster analysis. ANOVA was applied to verify the significant differences between the clusters for each variable, and Tukey post-hoc tests were used to analyse significant group differences. A significance level of 5% was employed for statistical inference. The sample comprises 46 African countries for which WTTC publishes data, with the exemption of Reunion, a French department and overseas region. The majority of the countries are classified as lower-middle income (43,5%) or low-income (41.3%), while only 13% are upper-middle income, and just one is classified as high-income. Table 1 summarises the variables used in the analysis for each target and goal.

Table 1: Variables

Goal	Target	Variables
8 - Decent work and economic growth	8.3. Employment development and job creation	Share of total national employment supported by T&T
	8.5. Achieve decent work for all	Share of T&T jobs in higher-wage sectors
	8.6. Youth employment	Share of youth employment (15-24) supported by T&T
	8.9. Promote sustainable tourism	Tourism direct GDP as a proportion of total GDP
5 - Gender equality	5. a. Women's equal rights to economic resources	Share of female employment supported by T&T
10 - Reduced inequalities	10.2. Promote social, economic and political inclusion	
		10.4. Achieve greater inequality

First, the analysis focuses on the importance of tourism in generating GDP in African economies, which will be measured by the *Tourism direct GDP*, as proposed by the Inter-agency and Expert Group on Sustainable Development Goal Indicators (IAEG-SDGS), which “corresponds to the part of GDP generated by all industries directly in contact with visitors” (Organisation for Economic Co-operation and Development, 2024). *Employment development and job creation*: This will be assessed on how much of the overall national employment is driven by T&T. *Decent work for all*: According to WTTC (2023a), high-wage jobs are “a critical indicator of progress - demonstrating that the sector can provide opportunities for people of all backgrounds to create meaningful, globally competitive careers.” (WTTC, 2023a: 2). High-wage jobs can be associated with more decent work since they can provide increased economic stability, demonstrating an organisation's appreciation for employees' expertise and contributions. These jobs are also frequently linked with a superior working environment. High-wage jobs in T&T are estimated by the number of jobs supported by T&T in each country's top third of earnings (WTTC, 2023a). High-wage employment is “defined as employment within industries whose average wage is above the 65th percentile of earnings in the country” (WTTC, 2023b: 2). *Access resources to all and gender equality*: One of the SDGs is to achieve gender equality and empower women and girls (Goal 5), and one of the targets (5. A) is women's equal rights to economic resources. Although the data on sex-disaggregated tourism is limited at the country level, which limits a more in-depth analysis, that target can be analysed by the share of female employment in T&T. This target, along with target 10.2, which includes social inclusion, will be assessed by the share of female employment supported by T&T (%), as WTTC (2023a).

Tourism can also be an important pathway to youth employment. This will be analysed by the share of youth employment (16-24) in T&T. *Economic and social equality*: To analyse the effect of T&T in achieving greater equality (Target 10.4), it was used the average labour share of GDP in T&T. GDP, in the income approach, represents the total income generated by the production of all economic goods and services and is split between company owners in the form of profits, and workers in the form of wages. A higher labour share (wages) can “indicate that gains from economic growth are shared more broadly, i.e. distributed among households rather than concentrated among (relatively fewer) owners of capital” (WTTC, 2023b: 4).

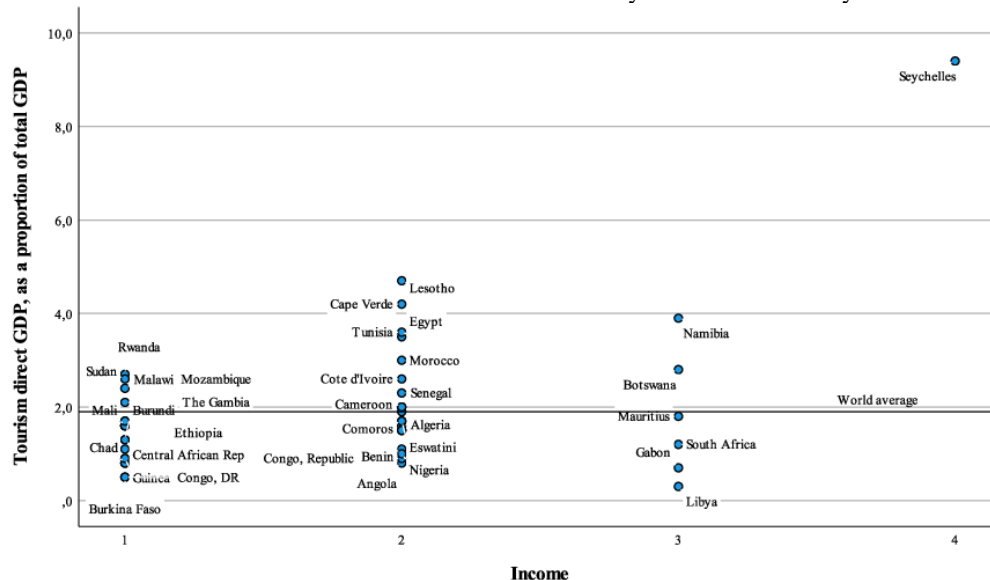
Results and discussion

The importance of the tourism industry

The direct contribution of tourism to GDP ranges from a minimum of 0.3% in Lybia to a maximum of 9.4% in Seychelles in 2021. On average, tourism in the sample contributes approximately 1.976% to total GDP, with a standard deviation of 1.5028. This indicates considerable variability in the contribution of tourism to GDP across the different African countries, with an average slightly higher than the global average of 1.9%. Several African nations exhibit a T&T direct contribution to GDP that



surpasses the global average, reflecting the importance of this sector to the overall economic activity. These countries are Cameroon, Zimbabwe, The Gambia, Senegal, Malawi, Cote d'Ivoire, Sudan, Rwanda, Botswana, Morocco, Egypt, Tunisia, Namibia, Cape Verde, Lesotho, and Seychelles (Figure 1). By income level, in Seychelles, the only high-income country in the sample, tourism has the highest direct contribution to GDP. Among upper-middle-income countries, the value of direct contribution to GDP spans from a minimum of 0.3% in Libya to a maximum of 3.9% in Namibia, with a median of 1.5%. In lower-middle-income countries, this contribution varies between 0.8% (Angola) and 4.7% (Lesotho), with a median of 1.8%. In the 19 countries with low-income, the direct contribution of T&T to GDP ranges from 0.5% (Burkina Faso) to a peak of 2.7% (Rwanda) with a median of 1.6%. So, apart from Seychelles, it is essentially in upper and lower-middle-income countries that the tourism industry contributes directly more to GDP.



Legend: 1- Low-income; 2- Lower-middle-income; 3- Upper-middle-income; 4- High-income
 Figure 1: Direct contribution of T&T to GDP

Employment development

Figure 2 shows the share of total national employment supported by T&T.

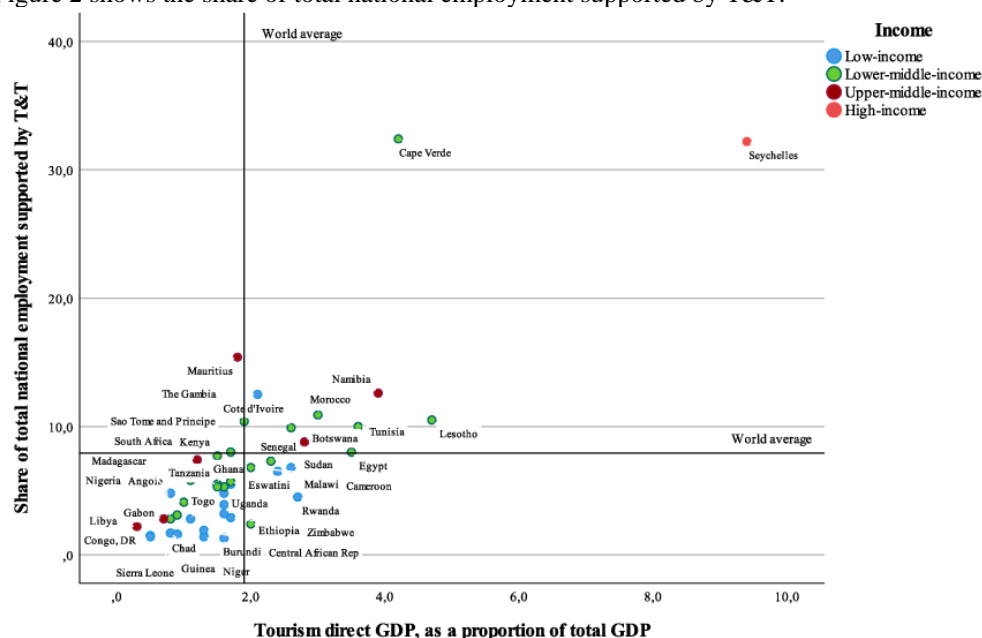


Figure 2: Share of total national employment supported by T&T

Tourism is a labour-intensive industry. Data show that T&T in Africa supports a share of national employment ranging from 1.3% in Niger to 32.4% in Cape Verde, with an average of 6.824% and a standard deviation of 6.5021. This underscores the importance the T&T sector can have in providing employment opportunities at a national level, although there is notable variability in its impact. Botswana, Comoros, Egypt, Cote d'Ivoire, Tunisia, Sao Tome and Principe, Lesotho, Morocco, The Gambia, Namibia, Mauritius, Seychelles, and Cape Verde exhibit a proportion of employment within the T&T sector relative



to national employment that equals or surpasses the world average (Figure 2). Moreover, there exists a strong positive correlation (0.812) between the direct contribution of T&T to GDP and employment, highlighting the crucial role of the sector in fostering economic growth and employment opportunities.

Decent work for all

In Africa, the share of direct T&T jobs categorised in high-wage sectors varies considerably between a minimum of 7% in Madagascar and a maximum of 98% in Rwanda. On average, in the sample, approximately 40.04% of direct T&T jobs are found in higher-wage sectors with a standard deviation of 23.12 (Figure 3). 58.69% of the countries in the sample have a share of high-wage direct jobs in T&T above the world average (34%), and contrary to the world trend where high-wage jobs in T&T have a larger share in low and lower-middle-income countries, in Africa, this is mainly observed in upper-middle-income countries (Figure 4). This may be explained by the fact that in the world, in high and upper-middle countries, high-wage jobs are observed in other sectors (WTTC, 2023a). In 2021, the majority of the countries in the top twenty countries in the world with the highest share of high-wage direct jobs in T&T are African, with Rwanda and Burundi leading the list in the world, the two outliers represented in Figure 4. This highlights that the tourism sector in these countries ensures equitable access to high-wage T&T employment opportunities, which is crucial for advancing the principles of decent work, including fair remuneration, social protection, and opportunities for personal and professional development.

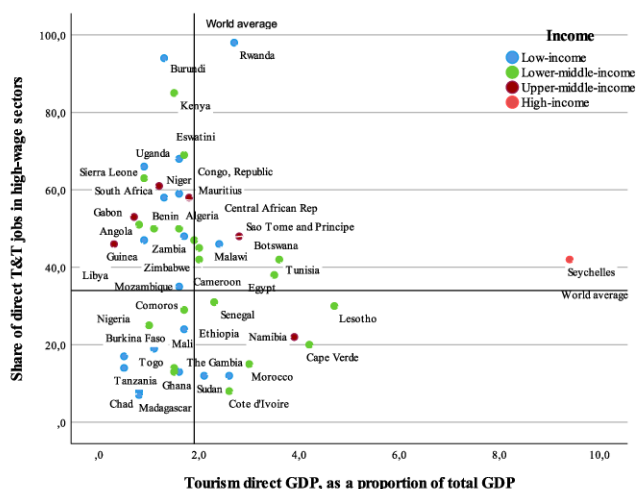


Figure 3: High-wage direct jobs in T&T

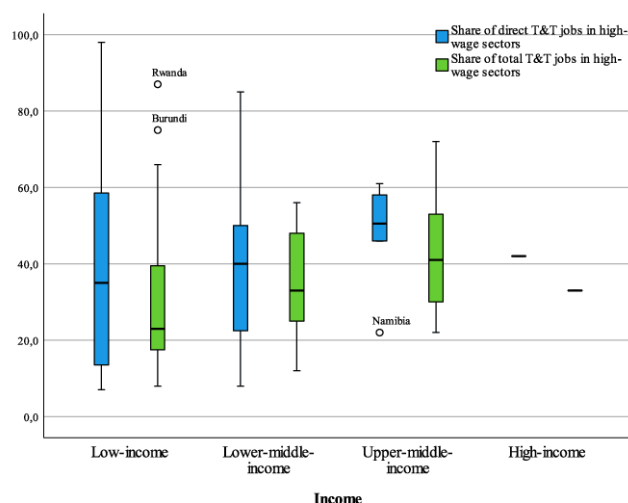


Figure 4: High-wage jobs in T&T by country level of income

When comparing the proportion of direct and total jobs (including indirect and induced) in tourism, focusing on high-paying sectors, we find that sectors directly involved in tourism tend to offer better wages than those indirectly and induced by tourism-related activities in a significant percentage of countries (57.5%). In this case, Uganda, Kenya, and the Central African Republic stand out with a difference of more than 25 percentage points (pp.). In these countries, the high-wage jobs supported directly by the tourism industry can be a source of promotion of decent work. However, in 17 economies, the proportion of jobs with high wages is lower in direct employment compared to total employment in T&T, particularly in Madagascar, Ghana, South Africa, Lesotho, and Chad. This result suggests a challenge in creating higher earnings in the sector. The comparative analysis of job attractiveness, in terms of high wages, in the tourism sector (direct) against all the sectors of the economy reveals a significant disparity, notably in countries like Burundi, Rwanda, and Kenya, where the difference exceeds 50 pp. This discrepancy highlights the potential of the tourism industry to contribute to achieving enhanced decent work in these nations.

Access resources to all and gender equality

Gender equality

Tourism is particularly important for women in countries where the male workforce dominates the labour market (WTTC, 2023a). Sustainable development can not be achieved without gender equality and women empowerment (Alarcón, 2017). While sex-disaggregated tourism data at the country level is limited, hindering a detailed analysis, the target can be assessed using the proportion of female employment in T&T. The female share in tourism direct employment ranges from 13% (Egypt) to 63% (Tanzania and Togo), with an average of 38.8% and a standard deviation of 12.95. This share was below the economy-wide average for the region in 2021 (43.5%) and the world (39%). There are several countries with very high shares of female employment in tourism (more than 50%), such as Togo, Tanzania, Uganda, Ghana, Namibia, Democratic Republic of Congo, Seychelles, Burkina Faso, and Botswana (Figure 5).

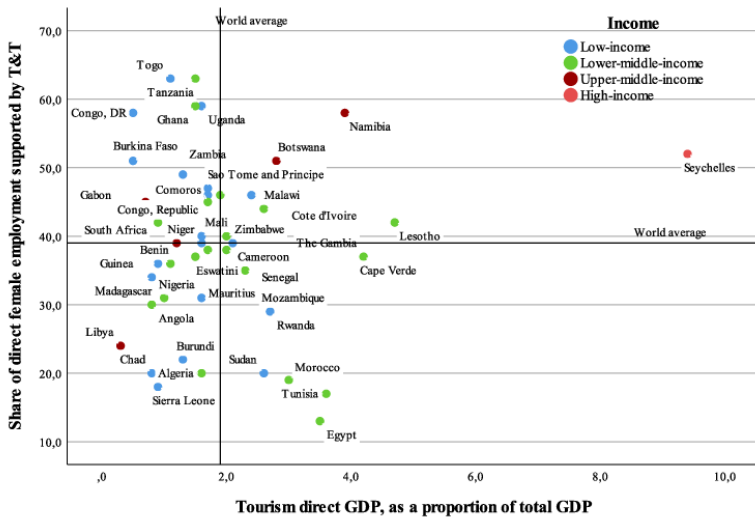


Figure 5: Share of direct female employment in T&T

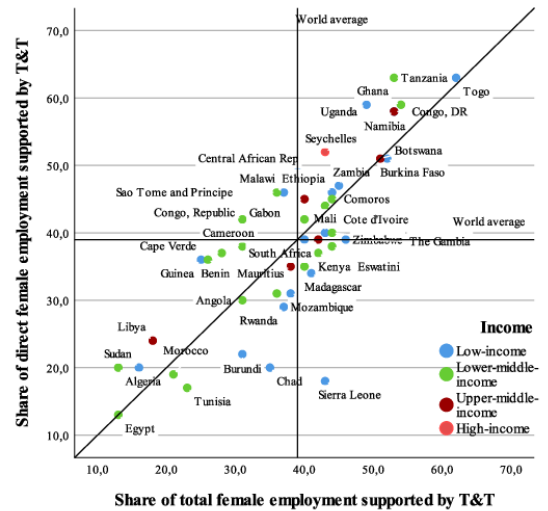


Figure 6: Direct and total female employment in T&T

While in the world, on average, there are no differences between the female share of direct and total employment in tourism (39%), in the sample of the African countries, female direct employment (38.8%) is slightly higher than total employment in this industry (38.1%). A very significant set of countries exhibit high levels of both direct and total employment in tourism (exceeding the global average) (upper right quadrant of Figure 6), and where the direct contribution of tourism to female employment absorbs a higher percentage of women than when additionally considering indirect and induced employment. This is the case of Botswana, Central African Republic, Comoros, Democratic Republic of Congo, Cote d'Ivoire, Ethiopia, Ghana, Gabon, Lesotho, Namibia, Seychelles, Tanzania, Togo, Uganda, and Zambia. It is also important to mention that in several African nations, the tourism sector exhibits female participation rates (direct employment) that exceed the average within the broader economy. More specifically, this phenomenon is observed in Togo, Tanzania, Ghana, Sao Tome and Principe, the Democratic Republic of Congo, and Uganda, where female direct employment in the tourism industry is at least 10 pp. higher than in the respective overall economy. This suggests that in these African countries, tourism can have an important role in advancing gender equality and women's empowerment.

Youth employment

The tourism sector can be an important source of employment for young people. In the sample of the African countries, the share of direct youth employment in the tourism workforce ranges from a minimum of 8.0% in Lesotho, Mauritius, and Nigeria to a maximum of 27.0% in Uganda and Mozambique (Figure 7). On average, approximately 15.15% of the direct employment supported by the T&T sector is filled by young people in Africa (with a standard deviation of 4.65), similar to the total youth employment in the industry (15.02%). In most African countries, young workers represent a smaller share of the direct (and total) workforce in the T&T sector compared to the national average for the economy as a whole, particularly in Niger, Zimbabwe, Central African Republic, Guinea, Mali, Burkina Faso, Zambia, Madagascar, Tanzania, and Malawi. Indeed, the agricultural industry is the primary source of employment for young individuals across Africa (WTTC, 2023a). Africa is the only region where the proportion of youth employment is lower than in the overall economy.

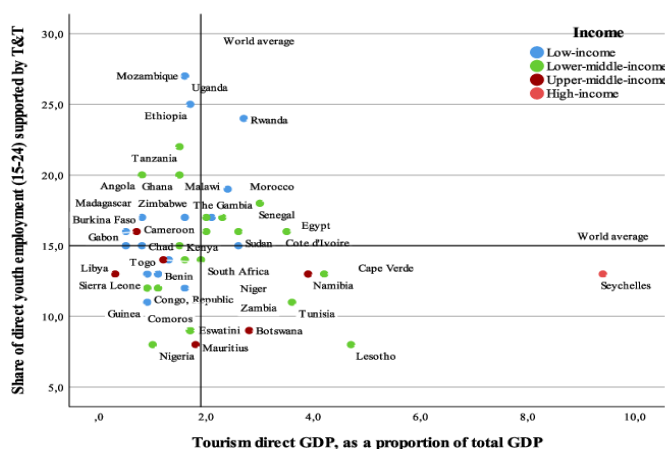


Figure 7: Share of direct youth employment in T&T

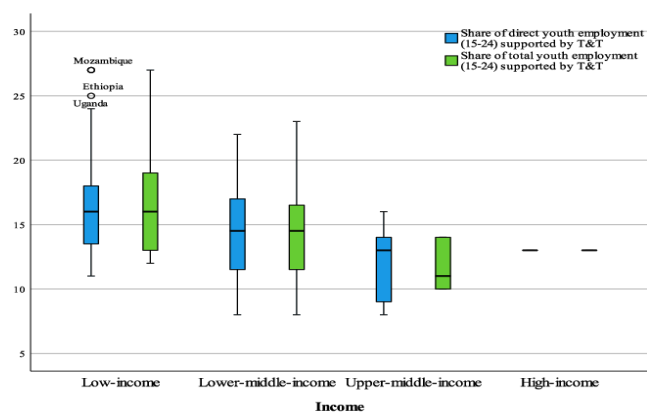


Figure 8: Share of direct and total youth employment in T&T by level of income



In lower-income economies, tourism emerges as a significant source of employment for young individuals (particularly in Mozambique, Uganda, and Ethiopia), followed by lower-middle-income economies (Figure 8). This trend contrasts with the scenario worldwide, where high-income economies typically boast the highest levels of youth employment opportunities within the tourism sector, often in entry-level roles like hospitality and retail. Conversely, in developing countries, tourism jobs are typically more valuable in the long term, attracting older workers (WTTC, 2023a). However, the results from Kruskal-Wallis tests (K-W) reveal no statistically significant differences between both the share of direct youth employment in T&T by country level of income (H de K-W=5.362, p-value=0.147) and the share of total employment by level of income (H de K-W=7.475, p-value=0.058).

Greater equality

GDP can be understood as an economic surplus split between company owners in the form of profits and workers (labour) in the form of wages. The average labour share of GDP in T&T is 49% in the world, while in the sample of African countries is 30%. This means that in the world, on average, gains from economic growth are shared more broadly, i.e. distributed among households rather than concentrated among (relatively fewer) owners of capital. The statistics for Africa indicate that the labour share of GDP within the T&T sector ranges from 8.5% (Central African Republic) to 58.8% (Comoros) (Figure 9). This highlights that only in a few countries does the GDP generated in tourism accrue more to the workforce than to profits.

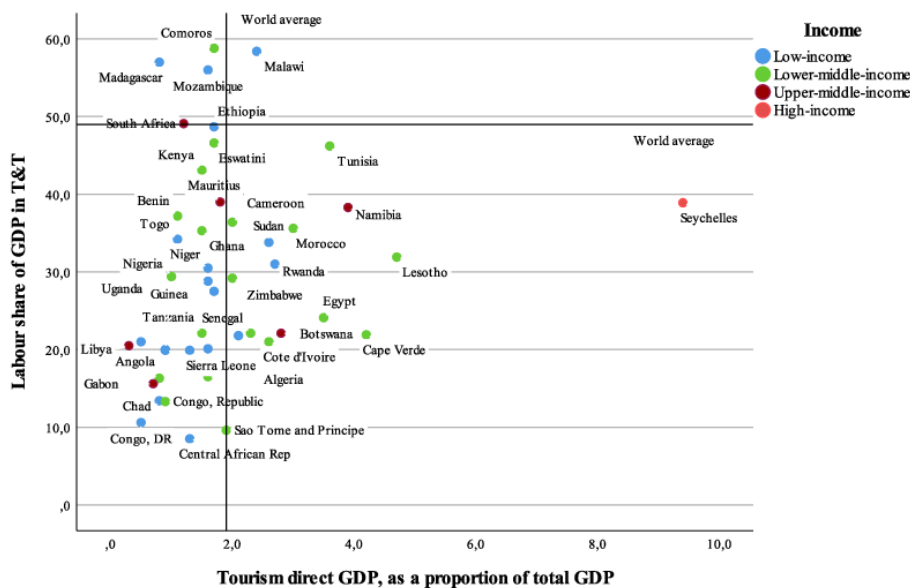


Figure 9: Labour share of GDP in T&T

Cluster analysis

To identify groups of countries with similar performance related to tourism, from the perspective of its importance to the economy and the social impacts related to the labour market it was made a cluster analysis. To do so, the variables were binned, first by the world average and then by the minimum and maximum value in the region. A hierarchical cluster analysis was applied, with the nearest neighbour method using the squared Euclidean distance as a measure of dissimilarity among countries. After analysing the dendrogram and the criteria of the distance between the clusters, a three-cluster solution was decided. Following that, the analysis underwent further refinement using the K-means method, and the outcome of dividing the data into three clusters yielded the most understandable interpretation. Table 2 reports the average values for the original variables and the ANOVA results for the three clusters retained. The results for the Z-value reveal that the clustering variables' means differ significantly for the tourism direct contribution to GDP, the share of total national employment and youth employment supported by T&T, and the share of higher-wage jobs. Employment, higher-wage jobs, and tourism's direct contribution to GDP allow more discrimination among the clusters.

Table 2: Results of the cluster analysis

	Average values (original variables)			ANOVA				
	Cluster 1 n=20	Cluster 2 n=15	Cluster 3 n=11	Sum of Squares	df	Mean Square	Z	Sig.
Tourism direct GDP, as a proportion of total GDP	1.34	1.57	3.68	10.471	2	0.510	20.534	<0.001
Share of total national employment supported by T&T	3.86	4.94	14.97	16.384	2	0.330	49.576	<0.001
Share of direct female employment supported by T&T	35.95	42	39.45	1.307	2	1.043	1.252	0.296
Share of direct youth employment of total employment supported by T&T	14.7	17.67	12.55	4.098	2	0.723	5.664	0.007
Share of direct T&T jobs in higher-wage sectors	58.9	19.8	33.63	18.013	2	0.588	30.640	<0.001
Labour share of GDP in T&T	26.97	35.14	28.62	1.958	2	0.730	2.680	0.080



Cluster 1 comprises 20 countries: Algeria, Angola, Benin, Burundi, Cameroon, Central African Republic, Republic of Congo, Eswatini, Gabon, Guinea, Kenya, Libya, Niger, Nigeria, Rwanda, Sierra Leone, South Africa, Uganda, Zambia and Zimbabwe. 45% of these countries are lower-middle income economies, 40% low and 15% upper-middle income. In examining the economic dynamics of this cluster, it is evident that the reliance on tourism as a significant contributor to global economic activity is low: the direct contribution of tourism to total GDP averages 1.3%, which is below the worldwide average, ranging from a minimum of 0.3% (Libya) to a maximum of 2.7% in Rwanda. Apart from Rwanda, only Cameroon and Zimbabwe surpass the world average, but by just 1pp. The share of employment in this industry relative to national employment is the lowest among the three clusters under consideration, and in all countries, this share is below the world average (on average 4.1 pp.). Also, the proportion of female employment within the tourism sector is the lowest among the three clusters, with direct female employment in T&T falling below the world average in 60% of the economies. However, Uganda and the Central African Republic exhibit higher rates than the world (20 and 10 pp., respectively), as well as Zambia, Gabon, Congo Republic, and Zimbabwe. Compared to the overall female employment rate across all sectors of the economy, Uganda exhibits a higher rate of direct female employment in tourism by 10 pp., and Algeria exhibits a marginal increment of 1 pp., while the Central African Republic and Gabon have an increment of 4 and 6 pp., respectively. In the remaining countries, direct female employment within the tourism industry notably lags behind the average workforce representation across all sectors, reflecting an average deficit of 13.6 pp. However, in several countries, the share of direct female employment in T&T is higher than total female employment in this industry.

In this cluster, youth employment is marginally below the world average. Only in Algeria, Gabon, Libya, and South Africa do direct and total youth employment in tourism surpass the national average. Comparatively, when juxtaposed with the same indicator at the world level in the T&T industry, Angola, Cameroon, Central African Republic, Gabon, Rwanda, Uganda, and Zimbabwe have higher levels of direct youth employment. Despite these trends, it is noteworthy that employment in the tourism industry within Cluster 1 exhibits the highest average share in higher-wage sectors, nearly triple the value observed in Cluster 2, and is higher at 76% than the observed in Cluster 3. In all countries, the share of direct jobs in higher wage sectors in tourism vastly exceeds the national level (by 25.9 pp.) and, except in Nigeria, the world rate (26.7 pp.). This suggests that while tourism may not be the primary driver of economic activity in these countries, the jobs it generates offer relatively higher wages than other sectors, which can be an attractive factor for tourism development. Regarding equity in income distribution, this cluster exhibits a low relative share of GDP allocated to workers compared to capital, falling 23.2 pp. below the global average. Only South Africa surpasses the world average by 0.1 pp. These figures underscore significant challenges in achieving equitable income distribution within the tourism industry in these countries.

Cluster 2 consists of 15 countries: Burkina Faso, Chad, Comoros, Democratic Republic of Congo, Ethiopia, Ghana, Madagascar, Malawi, Mali, Morocco, Mozambique, Senegal, Sudan, Tanzania, and Togo. These countries are primarily low-income (66.7%), and the remaining are lower-middle income. The tourism direct contribution to GDP is marginally lower than the world average but not so low as in Cluster 1. Only four countries surpass the world average with an average of 0.7 pp. The contribution to total employment is also lower than the world average, except in Morocco. The average share of female direct employment in tourism is 42.0%, which is higher than the world average. However, in Burkina Faso, the Democratic Republic of Congo, Ghana, Tanzania, and Togo, the tourism sector has a higher direct share of females employed than in all the other sectors of the economy, and when compared with the world, Malawi and Mali also join. This cluster demonstrates the best performance in direct youth employment within the tourism sector, surpassing the world average, albeit with the exceptions of Comoros and Togo. However, in most countries within this cluster, the youth employment rate in tourism remained lower than the national average for all job sectors. Nevertheless, it exhibits the most subpar performance concerning high-paying direct employment opportunities, with an average rate of 19.8%. Across the nations, excluding Comoros, Ethiopia, Malawi, Mozambique, and Senegal, the proportion of high-wage direct employment within the tourism sector falls below that of the overall economy. Furthermore, in 87% of the countries, this proportion is also below the world average for direct employment within the tourism industry. Among all clusters, this sector boasts the highest labour share in GDP within the tourism industry, averaging 35.1%. However, this figure still falls significantly below the global average. Notable exceptions include Comoros, Malawi, Madagascar, and Mozambique. The Republic of Congo stands out unfavourably, with only 10.6% of GDP accruing to workers, highlighting a stark disparity in labour's share compared to capital within the tourism sector.

Cluster 3 includes 11 countries: Botswana, Cape Verde, Cote d'Ivoire, Egypt, The Gambia, Lesotho, Mauritius, Namibia, Sao Tome and Principe, Seychelles and Tunisia. Countries with higher income levels form this cluster: 9.1% are high-income, 27.3% are upper-middle, 54.5% are lower-middle, and 9.1% are low-income. This cluster has the highest average contribution of the tourism industry to global GDP, amounting to 3.7%. Seychelles emerges as an outstanding leader within this context, followed by Lesotho, Cape Verde, Namibia, Tunisia, and Egypt. The tourism industry is an important driver of national economic dynamics in these countries. Tourism's direct contribution to GDP is directly linked with employment in the sector, making this cluster with the highest average share of employment in tourism relative to total employment, nearly 15%, with Seychelles reaching a peak of 32.2%. Furthermore, female direct employment within the tourism industry is marginally higher than the world average. Nevertheless, when juxtaposed with the overall employment rate in each country, the tourism industry contributes a more significant share to female employment only in Botswana, Cote d'Ivoire, Namibia, Sao Tome and Principe, and Seychelles. In comparison to global statistics on female direct employment in T&T, Botswana, Cote d'Ivoire, Lesotho, Namibia, Sao Tome and Principe, The Gambia, and Seychelles present a more favourable performance, fostering gender equality and female resource access. This cluster has the lowest rate of direct youth employment in tourism. Compared



to the global average for direct youth employment and youth employment across all sectors in their respective economies, most countries in this cluster lag. This highlights a significant challenge in leveraging tourism as a driver of youth employment.

In terms of decent work, as gauged by the prevalence of higher-wage employment, the cluster exhibits an average of 33.4% of direct jobs commanding high wages, surpassing the economy-wide average in 55% of the economies. This cluster displays a lower share of high-wage jobs compared to cluster 1. Although the average is marginally lower than the global average, in 63.6% of the countries within this cluster, the proportion of high-wage direct jobs in tourism exceeds the global average for this industry. This suggests a localised trend towards comparatively higher remuneration within the tourism workforce, potentially reflecting efforts towards enhancing job quality and economic sustainability within the sector across these nations. Across all countries in this cluster, the labour share of GDP in tourism falls below the global average by 20.4 pp. Sao Tome and Principe stands out within this cluster for experiencing the most significant inequality in income distribution between labour and capital in the tourism sector, with only 9.6% of GDP attributed to labour income.

Conclusions and policy implications

Tourism in Africa presents significant potential for driving socioeconomic development, although it has persistent challenges compared to other regions globally. Despite the share of international tourist arrivals in Africa being comparatively lower, the tourism industry has exhibited higher growth rates, suggesting unexplored opportunities for sustainable development. To advance the SDGs in African countries, it is crucial to take advantage of tourism's myriad impacts, such as decent work and gender equality. However, addressing decent work challenges and promoting fair treatment of workers, particularly women and youth, remains imperative to align tourism with SDGs effectively. This paper contributes by examining statistical indicators and employing a cluster analysis to comprehend tourism's impact on labour-related SDGs in Africa, offering insights to guide policy and practice toward more inclusive and sustainable tourism development. Tourism's economic impact in Africa varies widely by country, with Seychelles leading in direct GDP contribution. Upper- and lower-middle-income countries rely more on tourism to generate GDP and employment. Some countries have well-developed tourism industries that could profit from increased investments. The significant relationship between tourism's impact on GDP and employment highlights the sector's crucial role in stimulating economic expansion and the generation of jobs. If job creation is important, decent work is fundamental for individuals' well-being. Upper-middle-income countries in Africa exhibit a trend where high-wage tourism jobs are more marked compared to the global pattern, potentially due to job distribution across other sectors in higher-income countries worldwide. The emphasis on high-wage tourism employment in some African underscores the industry's role in promoting decent work, including fair pay and professional development. In about 35% of African nations, the tourism sector demonstrates direct female participation rates exceeding the broader economy. This demonstrates the potential of tourism in promoting gender inclusivity by exceeding average female employment rates within the sector, suggesting a pathway for leveraging tourism for broader socioeconomic empowerment of women in Africa. In most African countries, young workers constitute a smaller proportion of the tourism workforce compared to the overall economy, but in some lower-income economies tourism serves as a channel for youth employment and economic participation, contrasting with global trends dominated by high-income economies. Also, in most African nations, the proportion of GDP accruing to tourism workers is lower than the global average. Addressing disparities in labour share can be crucial for promoting a more equitable distribution of economic gains from tourism, potentially fostering broader inclusive growth in the region.

The cluster analysis led to a three-cluster solution with statistically significant differences in reliance on tourism, employment, youth employment, and decent work. Several conclusions can be drawn from comparing the characteristics of the three clusters in this analysis. First, Cluster 1 has limited economic impact in terms of generating GDP and job creation, gender disparities, missed youth opportunities, and inequalities between the share of GDP that accrues to workers as compared to the share that accrues to capital in favour of capital. Nevertheless, the share of higher-paying tourism jobs is much higher than the world average. Secondly, Cluster 2 tourism also has a low contribution to economic activity and employment, has income disparities, and offers suboptimal high-paying direct employment opportunities in the tourism sector. The share of direct female and youth employment has the highest rates among the three clusters, but there is room for improvement in gender and youth inclusion in tourism employment. Finally, Cluster 3 has a strong tourism sector and generates many direct jobs, but the labour share on GDP is very low, and the share of direct jobs in higher-wage sectors within the industry is marginally lower than the world average, denoting income inequalities and challenges related to decent work. There are also concerns regarding youth employment in tourism, which lags behind global averages. Clusters 1 and 2, in particular, need to invest in the growth of the tourism sector, boosting job creation since it is a labour-intensive industry. Investing in infrastructure, training initiatives, and incentives for entrepreneurship in tourism-related industries could boost job creation and economic development. Although African countries have made substantial progress in implementing legal reforms to advance gender equality, countries in clusters 1 and 3 should focus on promoting it in tourism. This could involve implementing policies to promote women's participation, namely in higher-paying roles, and providing training programs in the tourism industry. In cluster 3, authorities could promote broader gender inclusion strategies to maximise the benefits of tourism.

Several measures could be implemented to achieve substantive progress toward gender equity in the tourism workforce. Firstly, initiatives should be directed at encouraging women to enter the labour market, and towards women's access to quality job opportunities to foster equitable access to career advancement (WTTC, 2019). Policies need to have provisions for extensive support systems that assist women in joining the workforce. This involves ensuring that childcare facilities are easy to access, providing extensive social benefits, strong safeguards for maternity, and encouraging women to return to work after having children. Flexible work arrangements should be broadened to encompass a range of caregiving duties and promote a harmonious



blend of work and personal life. It also involves encouraging women to pursue education and professional development to acquire the necessary skills for career success. Secondly, measures must be taken to address wage disparities for the same job to reduce the gender wage gap. Governments can significantly mitigate this inequality by establishing systems to oversee and enforce fair compensation methods. Thirdly, promoting female participation in leadership positions within companies is crucial, as this will support varied decision-making and establish an inclusive work environment that promotes gender equality. In addition to these actions, it is important to attempt to address the subconscious prejudices that continue to support gender discrimination in the process of hiring and promoting employees. It is crucial to educate employers and raise awareness about the advantages of gender diversity in the workplace to foster an inclusive and merit-based atmosphere. Furthermore, policies are essential in encouraging the development of female entrepreneurship through providing fair access to funding and support for starting businesses. Governments can assist women in attaining economic self-sufficiency by removing obstacles to getting started and fostering the growth of their enterprises.

African nations must recognise the importance of tourism in generating youth employment and put in place tactics to fully leverage this opportunity. This could include funding education and training directed towards the tourism industry's requirements, backing young entrepreneurs' projects, and creating career progression paths in the sector. This may involve investing in education and training programs geared toward the needs of the tourism sector, supporting youth entrepreneurship initiatives, and creating career progression within the industry. This is particularly important in clusters 1 and 3 to address missed opportunities for youth employment in the sector. African countries should focus on ensuring equitable job opportunities within the tourism sector. This involves promoting professional development, particularly in high-wage tourism jobs, and addressing disparities in the distribution of tourism-related income. By fostering a more inclusive workforce, countries can harness tourism's potential to drive sustainable economic development and reduce inequality. Addressing disparities in the distribution of GDP within the tourism sector is crucial for promoting inclusive growth, particularly in Clusters 1 and 3. African countries should strive to ensure that the economic benefits of tourism are shared more equitably among workers and capital holders.

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